



Configuring and Using ArchFX Action Manager

4 March 2025



About this training

- This training covers ArchFX Action Manager features that are typically used by:
 - Operators
 - Line Managers
 - Supervisors
 - Maintenance Engineers
 - Manufacturing Engineers
- ... to create Action Manager Triggers and respond to them.

ArchFX Action Manager basics

| | |
|---------------------|--|
| Product | ArchFX Action Manager |
| Customer Pain Point | Manufacturers need to keep manufacturing processes within targeted ranges on numerous metrics to ensure continuously high productivity. When processes deviate from prescribed ranges, they need to automatically detect this and promptly inform the appropriate person or team for timely resolution. |
| Summary | ArchFX Action Manager enables manufacturers to define triggers that will create an alert when a specified condition occurs. Alerts are assigned to the desired person and escalated if needed. Alerts include a link to a playbook describing the standard operating procedure. Analytics measure how effectively teams respond. |



Logging in to ArchFX Cloud at app.archfx.io


User logs in to
ArchFX Cloud

Enter customer
name after
“Server”

Arch Factory

app.archfx.io/login

Welcome to

ARCH 

Server .archfx.io

Login with

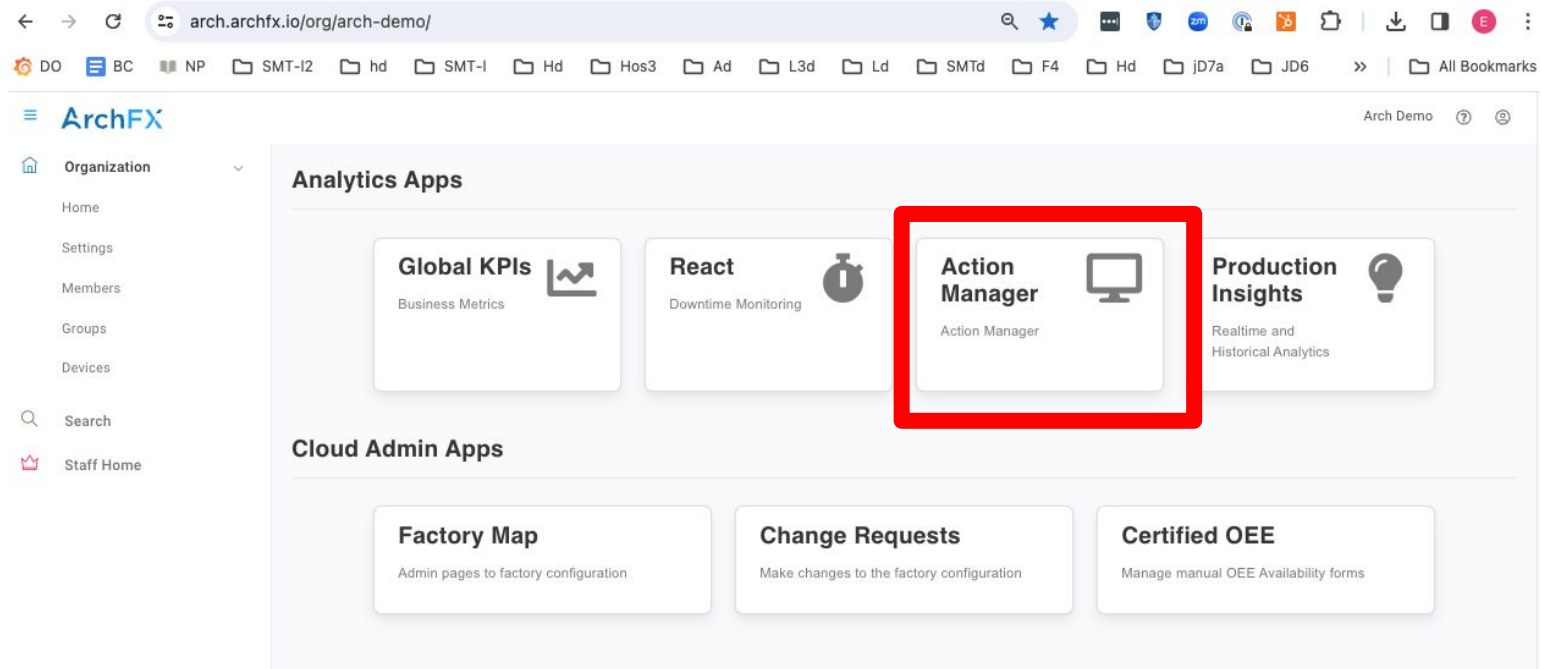
ArchFX

"From incompatible machines to manufacturing intelligence"



Logging in to ArchFX Action Manager

User opens
ArchFX Action
Manager.



If you don't see "Action Manager," email help@archsys.io to request access.



Availability



Action Manager Home Page

🔍 Search

English ▾

Arch Demo ▾



You are not available

Mark Self as Available

Actions

See your assigned actions

Activity Feed

See activity and trends

Playbooks

Manage solutions

Trigger Management

Manage alert sources

Groups

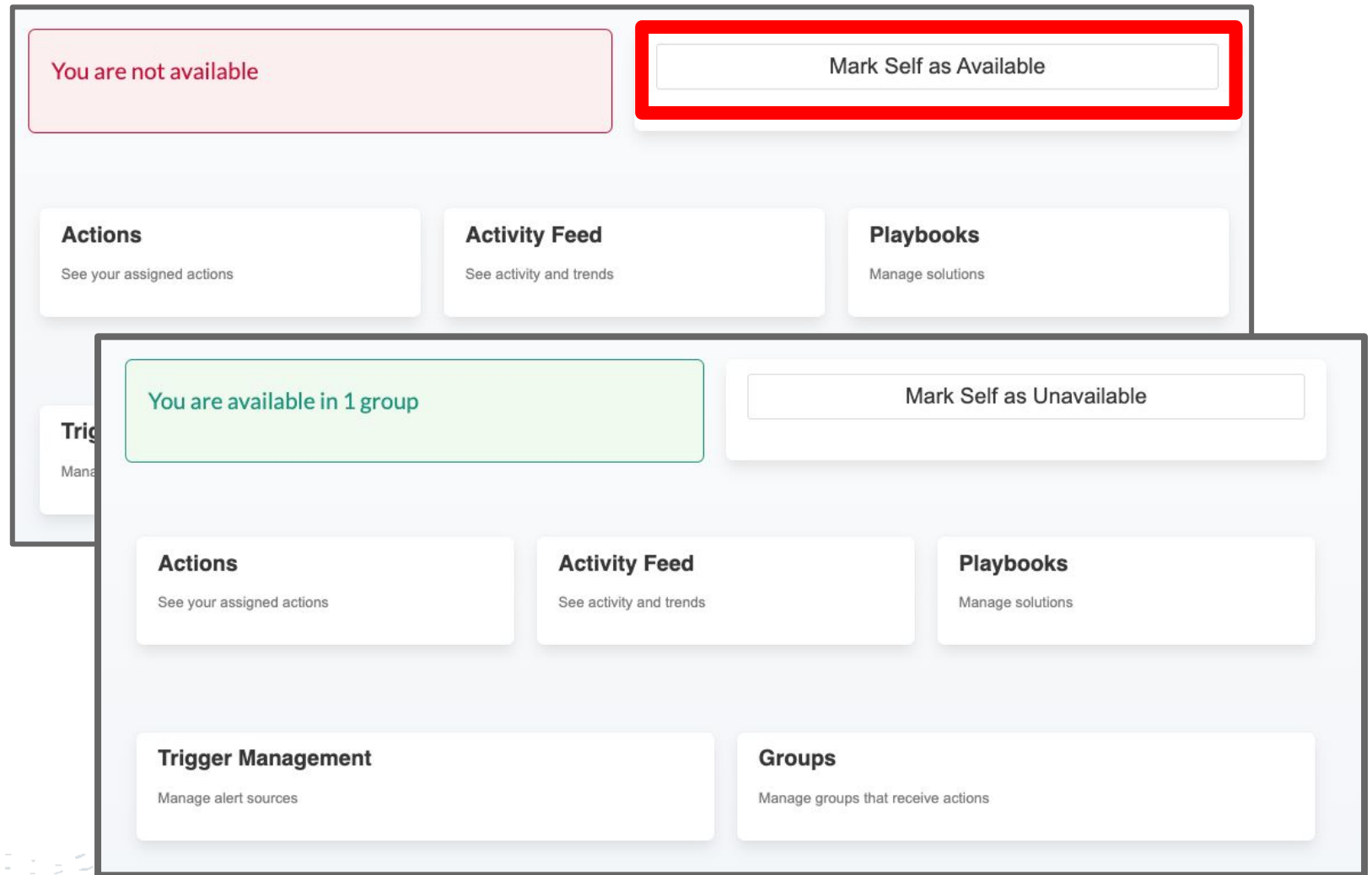
Manage alert sources



Setting self “available”

User starts out “not available.”

Click “Mark Self as Available” to show you’re “on duty” for alerts within Action Manager.





Managing Groups



Groups tab

Filter Groups by Site

Add new Group

Action Manager

Groups

Filters: Site ▾

Add new

All

Guadalajara N

Guadalajara N - Mechanicals

Guadalajara S

Milpitas

Milpitas Old

Suzhou Suhong

Suzhou Suqian

Guadalajara Test Group

Connectivity Management - Milpitas

Local PnP Expert Council

Demo Group 2

| | Created by |
|--|----------------|
| | acorona |
| | acorona |
| | sreemarchsysio |
| | gmeikarchsysio |
| | utthra |
| | cponthieu |
| | ekrockstaff |
| | ekrockstaff |



Add new Group

New group x

Name * Milpitas ICT Experts

Site * Milpitas v

Cancel Submit

Add new



Trigger Management



Trigger Management modules

Action Manager has a growing list of Trigger Management modules. Each one supports alerts of a particular kind.

Action Manager

Trigger Management

ModuleLocation

Quality - Defect Pareto

Arch Systems Trigger Driver

Material Downtime (Fuji)

Arch Systems Trigger Driver

Takt Time Deviation (React)

Action Manager Alerting

Downtime Duration (React)

Action Manager Alerting

Line Balance Rate (React)

Action Manager Alerting

Quality - False Call Rate

Arch Systems Trigger Driver

Placement Balance Rate

Arch Systems Trigger Driver

Machine Connectivity

Action Manager Alerting

Quality - Yield

Arch Systems Trigger Driver

Attrition Monitoring

Arch Systems Trigger Driver

Machine Faults

Arch Systems Trigger Driver



Browsing triggers by location

The “Location” tab lets you browse triggers by location.

Action Manager

Trigger Management

Module **Location**

| Location | Active Profiles | Inactive Profiles |
|----------------------|-----------------|-------------------|
| Azteca | 1 | |
| Guadalajara N | 33 | |
| Holly | 1 | |
| Milpitas | 3 | |
| Oradea | 3 | 4 |
| Penang | 3 | 1 |

Profiles + Add

🔍 Type location or description

| Description | Module | Scope | Status |
|---------------------------------|----------------|--|----------------|
| 32570 (3098-30986-30987) | Machine Faults | Areas: B10/B12/B16/B6 - Created at: 2024-02-05T22:36:34.776Z | In-sync |



Attrition Monitoring module

Module's home screen lists the triggers you've defined.

Filter
triggers by
typing
location or
description

Action Manager / Trigger Management

Attrition Monitoring

Profiles Add new

| Profile | Scope | Site | Status |
|--|---|---------------|---------|
| Attrition for Blackwell NPI products | Areas: B12 - Created at: 2023-12-15T03:28:38.736Z | Guadalajara N | In-sync |
| Attrition for NPI Rockwell products | Areas: B12 - Created at: 2023-12-13T19:36:18.822Z | Guadalajara N | In-sync |
| Attrition Threshold > 0.15% | Areas: B6 - Created at: 2023-11-07T08:50:11.128Z | Milpitas | In-sync |
| Attrition > 1% | Areas: B10 - Created at: 2023-11-01T04:25:24.372Z | Guadalajara N | In-sync |
| Attrition > 1% | Areas: B10 - Created at: 2023-11-01T04:16:04.869Z | Guadalajara N | In-sync |
| Attrition above 0.65% | Guad N - Line 1 | Guadalajara N | In-sync |

Add new
trigger

Click trigger
name to open.



Viewing a Trigger

Click “Routing” tab to view routing for this trigger.

In sync?

Trigger scope

Action Manager / Trigger Management / Attrition Monitoring

Profile

Delete

Details

Routing

Status

In sync

Scope

Areas: B10 - Created at: 2023-11-01T04:25:24.372Z

Description

Attrition > 1%

Edit

Temporarily Disable

Configuration

Triggered if in the given time window, the attrition exceeds the threshold and the number of placement is greater than the minimum.

Attrition Threshold

10000

PPM

Minimum Placement Count

100000

Level

Machine

Time Frame Parameters

Check Every

20

Minutes

Window

15

Hours

Save

Default Playbooks

Attrition exceeds Threshold

Add new playbook

Delete trigger

Edit trigger

Disable trigger

Threshold for trigger to execute
Minimum placements before trigger fires
Level of trigger: Machine, Line, etc.

Frequency to check
Lookback window when checking

Default Playbook for trigger.



Trigger Routing Tab

Action Manager / Trigger Management / Attrition Monitoring

Profile

Delete

Details

Routing

Step #1

Assign to

Local PnP Expert Council

Assignment option

Automatically assign to a random user

Notification Type

Email

Default Priority

☒ Escalate Automatically

After

15

minutes

Step #2

Assign to

Company PnP Experts

Assignment option

Automatically assign to a random user

Notification Type

Email

Default Priority

Delete

Add Escalation level (Routing step)

Delete trigger

Assign alert to whom at this step?

Assign to random **available** user in group or notify **all users** in the group whether or not they're available?

How to notify?

Escalate automatically? After how long?

Add escalation level



Playbooks



Types of Action Manager Playbook administrator users

| User Type | Permission settings | Capabilities |
|-------------------------------|--|--|
| Site Playbook administrator | has <code>can_manage_action_manager_playbook</code> permission on the Organization, but user is limited to accessing one or more specific sites | <ul style="list-style-type: none">• manage playbooks only for sites user has access to• see all draft/rejected playbooks created in their sites regardless who created them |
| Global Playbook administrator | has <code>can_manage_action_manager_playbook</code> permission on the Organization, and user is NOT limited to accessing specific site(s) (i.e. has access to ALL the sites) | <ul style="list-style-type: none">• manage all playbooks• see all draft/rejected playbooks at all sites |



Explore tab of approved playbooks

Action Manager

Playbook

Explore Draft

<Global>

Filter playbook entities ...

| Title | Location | Description | Created |
|------------------------------|---------------|--|-------------------------------------|
| Improve Line balance (empty) | Guadalajara N | During SMT manufacturing some lines will be ... | filippo 2023-01-27 |
| new collection | <Global> | | dzmitry 2023-05-10 |
| Preventive Maintenance | <Global> | Errors that cause Machine Down time | gmeik_demo 2024-02-05 |
| Quality | <Global> | Quality Issues | gmeikarchsysio 2023-09-09 |
| Solve Attrition issues | <Global> | During SMT manufacturing some components will be ... | filippo 2023-01-27 |

Add ▾

Add Playbook

<Global> means we are at the root of the playbook collections structure, and these playbooks are available across all sites.



Draft tab of in-development playbooks

Action Manager

Playbook

ExploreDraft

SiteStatus

| Title | Location | Approval level | Description | Status | Created |
|---------------------------|---------------|----------------|--|----------|-----------------------|
| Guadalajara Playbook | Guadalajara N | | Steps to resolve attrition in Guadalajara | Draft | ekrock 2024-03-08 |
| playbook (copy - 2) | <Global> | | aaaaa | Draft | dzmitry 2024-01-10 |
| Copy of playbook | <Global> | | aaaaa | Draft | dzmitry 2024-01-10 |
| Playbook (copy - 1) | <Global> | | aaaaa | Draft | dzmitry 2024-01-10 |
| Test Playbook | <Global> | | aaaaa | Draft | dzmitry 2024-01-09 |
| Attrition > Threshold | Milpitas | | Steps when attrition is over the threshold | Draft | dzmitry 2023-11-24 |
| C of Test Utthra Playbook | Guadalajara N | site | Test Utthra Playbook | Rejected | utthra 2023-11-01 |
| Test Utthra Playbook | Guadalajara N | site | Test Utthra Playbook | Draft | utthra 2023-11-01 |
| test playbook quality | <Global> | | test playbook quality | Draft | utthra 2023-10-24 |

[Add Playbook](#)



Create new collection of playbooks

Add → New collection to create a new collection of playbooks

The screenshot shows the 'Action Manager' interface with a 'Playbook' section. A modal dialog titled 'New collection' is open, allowing the user to create a new collection. The dialog has a title bar with a close button (x). It contains two input fields: 'Title' and 'Description'. The 'Title' field is labeled with a red asterisk, indicating it is required. The 'Description' field is optional. Below the input fields are 'Cancel' and 'Submit' buttons. The background interface shows a search bar, language and demo dropdowns, and a table of existing collections.

| New collection ▾ | | Created |
|------------------|--|-----------------------|
| | | filippo 2023-01-27 |
| | | dzmitry 2023-05-10 |
| | | gmeik_demo |



Create new playbook

Add → New entity to create a new playbook

The screenshot shows the 'New Playbook' modal form in the Action Manager interface. The modal is titled 'New Playbook' and has a close button (X) in the top right corner. It contains four required fields (indicated by an asterisk):

- Title ***: Guadalajara Attrition Playbook
- Description ***: Steps to resolve attrition in Guadalajara
- Collection ***: Test Collection (dropdown menu)
- Site**: Guadalajara N (dropdown menu)

At the bottom of the modal are two buttons: 'Cancel' and 'Submit'.

The background interface shows the 'Action Manager' section with a 'Playbook' heading. There are tabs for 'Explore' and 'Drafts'. A search bar is visible at the top left. On the right, there are dropdowns for 'English' and 'Arch Demo', and a circular logo. Below the modal, a table lists created playbooks:

| Created |
|-----------------------|
| filippo 2023-01-27 |
| dzmitry 2023-05-10 |
| gmeik_demo |



Edit new playbook

Newly-created playbook is empty. You must add Tasks, then Request review.

Search

English Arch Demo

Action Manager / Playbook / Test Collection

Guadalajara Attrition Playbook

Duplicate Delete

This playbook is a draft

Request review

Description

Steps to resolve attrition in Guadalajara

Edit

Tasks

This playbook has no task, it is therefore not actionable in our system. Please create a task for this playbook.

Add New Task

[Request review](#)



Request review: site-level review

The screenshot shows the 'Attrition Playbook V2' interface. At the top, there's a breadcrumb 'Action Manager / Playbook / Solve Attrition issues'. Below it, the title 'Attrition Playbook V2' is displayed. To the right of the title are 'Duplicate' and 'Delete' buttons. A modal dialog titled 'Confirm Approval level' is open in the center. It has a close button (X) in the top right corner. Inside the modal, there's a label 'Approval level' followed by a dropdown menu currently showing 'Site'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. In the background, the main interface shows a yellow box stating 'This playbook is a draft', a 'Request review' button, an 'Edit' button, and a 'Tasks' section with a description: 'Please check the relevant Grafana Live attrition dashboard' and 'High component miss pickup in SMT machines can be caused by several factors- Please check the relevant Grafana Live attrition dashboard (Link) in order to identify potential root cause (Machine / Head / Feeder / PN / Track)'. At the bottom right of the tasks section, it says 'Success 0 Failed 0'.

- Playbook will only be visible within the site
- Approval request will go to site-level administrator
- If there's no site-level administrator, request will go to global playbook administrator

- If there's no administrator defined, error message will say "No playbook administrator has been configured in your organization; please contact Arch Systems"
- All playbook administrators at the appropriate level for review are notified by email
- Reviewers can accept or reject the playbook with a comment for the playbook creator



Request review: global-level review

The screenshot shows the 'Attrition Playbook V2' interface. At the top, there's a breadcrumb 'Action Manager / Playbook / Solve Attrition issues'. Below it, the title 'Attrition Playbook V2' is displayed. To the right of the title are 'Duplicate' and 'Delete' buttons. A yellow banner on the left says 'This playbook is a draft'. A 'Request review' button is on the right. A modal titled 'Confirm Approval level' is open in the center. It has a close button (X) in the top right. The modal contains a label 'Approval level' with a red asterisk, followed by a dropdown menu currently showing 'Global'. Below the dropdown is a 'Site' label and a list with 'Global' selected. The background of the interface shows a 'Description' field with the text 'Series of actions to check wh...' and a 'Tasks' section with a task description: 'Please check the relevant Grafana Live attrition dashboard' and 'High component miss pickup in SMT machines can be caused by several factors- Please check the relevant Grafana Live attrition dashboard (Link) in order to identify potential root cause (Machine / Head / Feeder / PN / Track)'. At the bottom right of the task section, it says 'Success 0 Failed 0'.

- Playbook will be visible globally
- Approval request will go to global administrators

- If there's no administrator defined, error message will say "No playbook administrator has been configured in your organization; please contact Arch Systems"
- All playbook administrators at the global level are notified by email
- Reviewers can accept or reject the playbook with a comment for the playbook creator



How to use Playbook Review workflow

Example: Site Juarez creates useful Attrition playbook written in Spanish. Advanced Manufacturing Engineering wants triggers enabled globally.

- AME copies Juarez Attrition playbook, makes it draft global playbook on “Draft” tab.
- AME translates draft global playbook into English so more people can read it and submits for review by global playbook administrators.
- Global playbook administrators review playbook. One administrator rejects it with a comment.
- AME updates playbook and re-submits for review by global playbook administrators. One approves it. Playbook is now visible on global playbook list under “Explore.”
- From now on, only global playbook administrators can edit the global Attrition playbook.



How to use Playbook Review workflow (cont'd)

- Each site now makes own copy of global Attrition playbook for their own site and customizes/translated triggers where necessary.
- New steps can be added to site playbooks (by site and global administrators) and to global playbooks (by global playbook administrators) at any time.
- Sites can submit new playbooks for consideration by global administrators by putting them in a new draft playbook and submitting it for review.
- Sites can copy new steps from global playbook at any time.



Actions Tab



Actions tab shows pending actions

Action Manager

Actions

Status ▾

Module ▾

Priority ▾

Milpitas ▾

B6 ▾

Line ▾

Machine ▾

Add new

My Assigned Actions

Title ▾Module ▾Created ▾Site ▾AreaLineMachineAssig... ▾Status ▾Priority ▾

No action was found

First

Prev

1

Next

Last

Other Actions

Title ▾Module ▾Created ▾Site ▾AreaLineMachineAssig... ▾Status ▾Priority ▾

Machine ConnectivityMachine ...6 days agoMilpitasB6Milpitas - ...PnP

Pending

Machine ConnectivityMachine ...6 days agoMilpitasB6Milpitas - ...SPIericdemo

Pending

Machine ConnectivityMachine ...6 days agoMilpitasB6Milpitas - ...Printerericdemo

Pending

Machine ConnectivityMachine ...6 days agoMilpitasB6Milpitas - ...SPIericdemo

Pending

Machine ConnectivityMachine ...14 days agoMilpitasB6Milpitas - ...PnPericdemo

Expired

Machine ConnectivityMachine ...14 days agoMilpitasB6Milpitas - ...SPIericdemo

Expired

Machine ConnectivityMachine ...14 days agoMilpitasB6Milpitas - ...Printerericdemo

Expired

Machine ConnectivityMachine ...14 days agoMilpitasB6Milpitas - ...SPIericdemo

Expired

Machine ConnectivityMachine ...21 days agoMilpitasB6Milpitas - ...AOIericdemo

Resolved

Machine ConnectivityMachine ...21 days agoMilpitasB6Milpitas - ...Printerericdemo

Resolved

Machine ConnectivityMachine ...21 days agoMilpitasB6Milpitas - ...AOIericdemo

Ignored



Viewing an Action

Action Manager / My Actions

599f8

Details

History

Tasks

▼ Attrition exceeds the threshold

Add new playbook

Dashboards

Attrition Drilldown (to segment) - Screenshot

Attrition Drilldown (to segment) - Live

Escalation Steps

Escalate Now

Stop Escalation

Escalating automatically in 12m 37s

| Name | Assigned to | Assignment option |
|---------|----------------------|-------------------------------------|
| Step #1 | Technicians L1 | Automatically assign to a random... |
| Step #2 | G2- Shift Technician | None, notify entire group |

Status

PENDING

Assigned To

Annette Arabasz

Priority

Site

Greymere

Source

SMT / Line 01

Module

Attrition Monitoring

Profile Description

Attrition over 1 pct

First Trigger at

January 15, 2025 at 17:02

Last Trigger at

January 15, 2025 at 17:04

Resolve

Ignore

Created 2 minutes ago



Expanding the list of steps

Action Manager / My Actions

599f8

Details

History

Tasks

^ Attrition exceeds the threshold

1. Check the Grafana Live attrition dashboard ⓘ

2. Inspect and adjust the feeders ⓘ

3. Ensure the correct nozzle is being used ⓘ

4. Check the mechanical condition of the nozzle ⓘ

5. Adjustment of Pickup Position ⓘ

6. Check the orientation of the component ⓘ

7. Check the speed of pickup and placement ⓘ

👍👎

👍👎

👍👎

👍👎

👍👎

👍👎

👍👎

Add new playbook

Dashboards

Attrition Drilldown (to segment) - Screenshot

Attrition Drilldown (to segment) - Live

Status

PENDING

Assigned To

Annette Arabasz

Priority

-

Site

Greymere

Source

SMT / Line 01 ⓘ

Module

Attrition Monitoring

Profile Description

Attrition over 1 pct

First Trigger at

January 15, 2025 at 17:02

Last Trigger at

January 15, 2025 at 17:04

Resolve

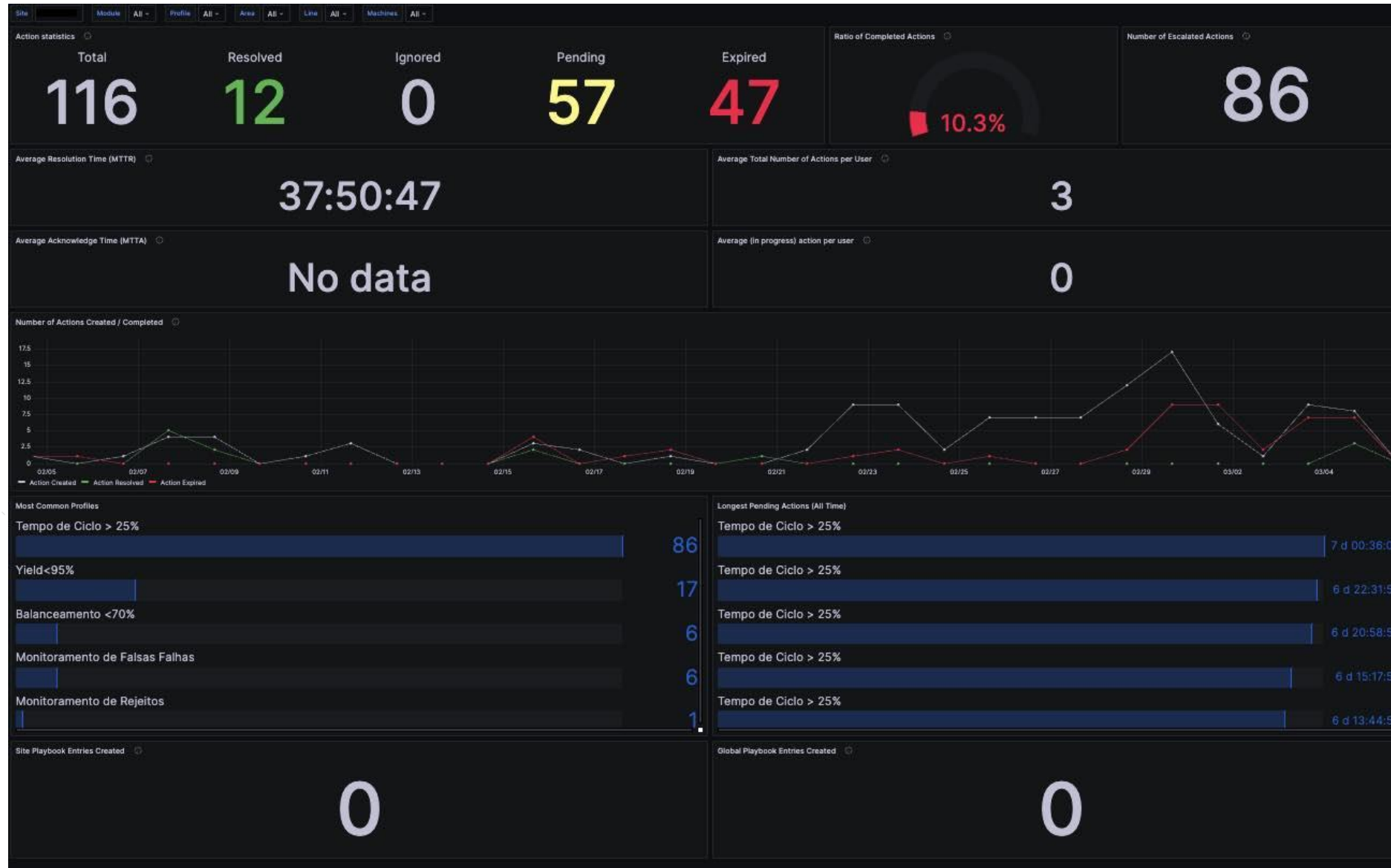
Ignore



Activity Feed



Activity Feed shows usage analytics





Adopting Action Manager



Adopting Action Manager

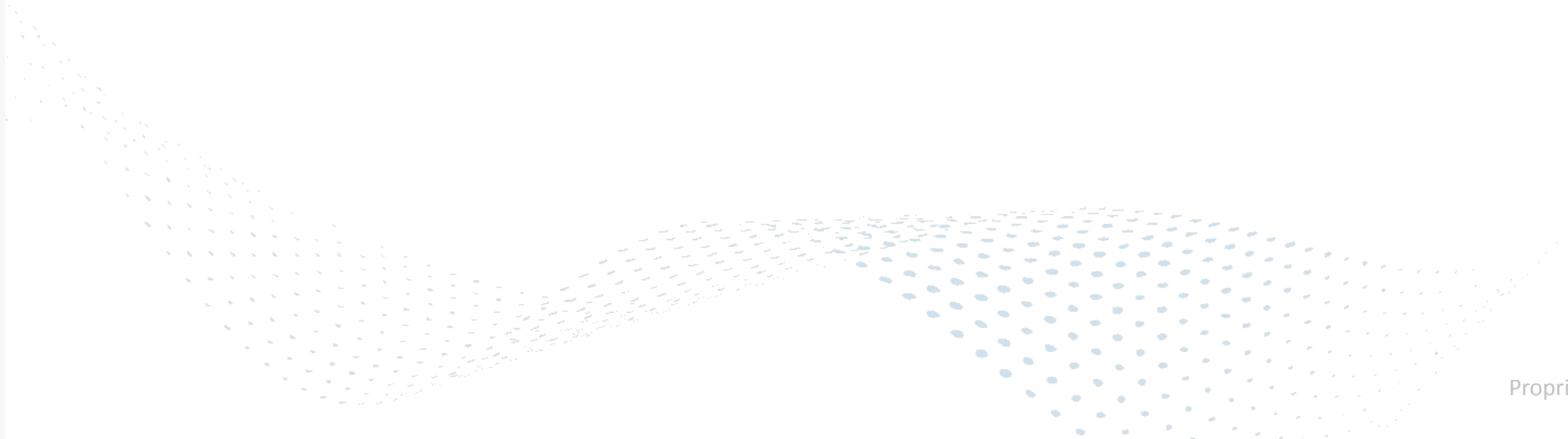
- Make sure to define at least two Global AM Administrators and two AM Administrators for each site (to provide vacation coverage).
- Action Manager starts at each site with no triggers and no playbooks.
- Each site can define its own triggers and playbooks based on its needs.
- Playbooks found to be useful at a site can be copied and submitted for global review to become Global Playbooks.
- Global Administrators can edit and maintain Global Playbooks, adding in the best ideas from all sites.
- Site Administrators can copy Global Playbooks and make them Site Playbooks

How Arch supports customers

- Set up and configure ArchFX, Factory Model, Action Manager
 - Set up Sites, Areas, Lines, Machines
 - Provision users
- Online Help Documentation
- Live training sessions during onboarding
- Email support and Q&A via help@archsys.io
 - See Data to Submit with an ArchFX Bug Report or Enhancement Request
 - Spam us! Please send **one question/issue per email** if possible so the ticket can be individually routed to the right expert
 - Tips on data to submit with a [ArchFX/GKPIS](#) help ticket
- Make improvements via road map feature request process
- Regular status review calls on schedule of mutual convenience



Questions?





Arch Systems

