

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.

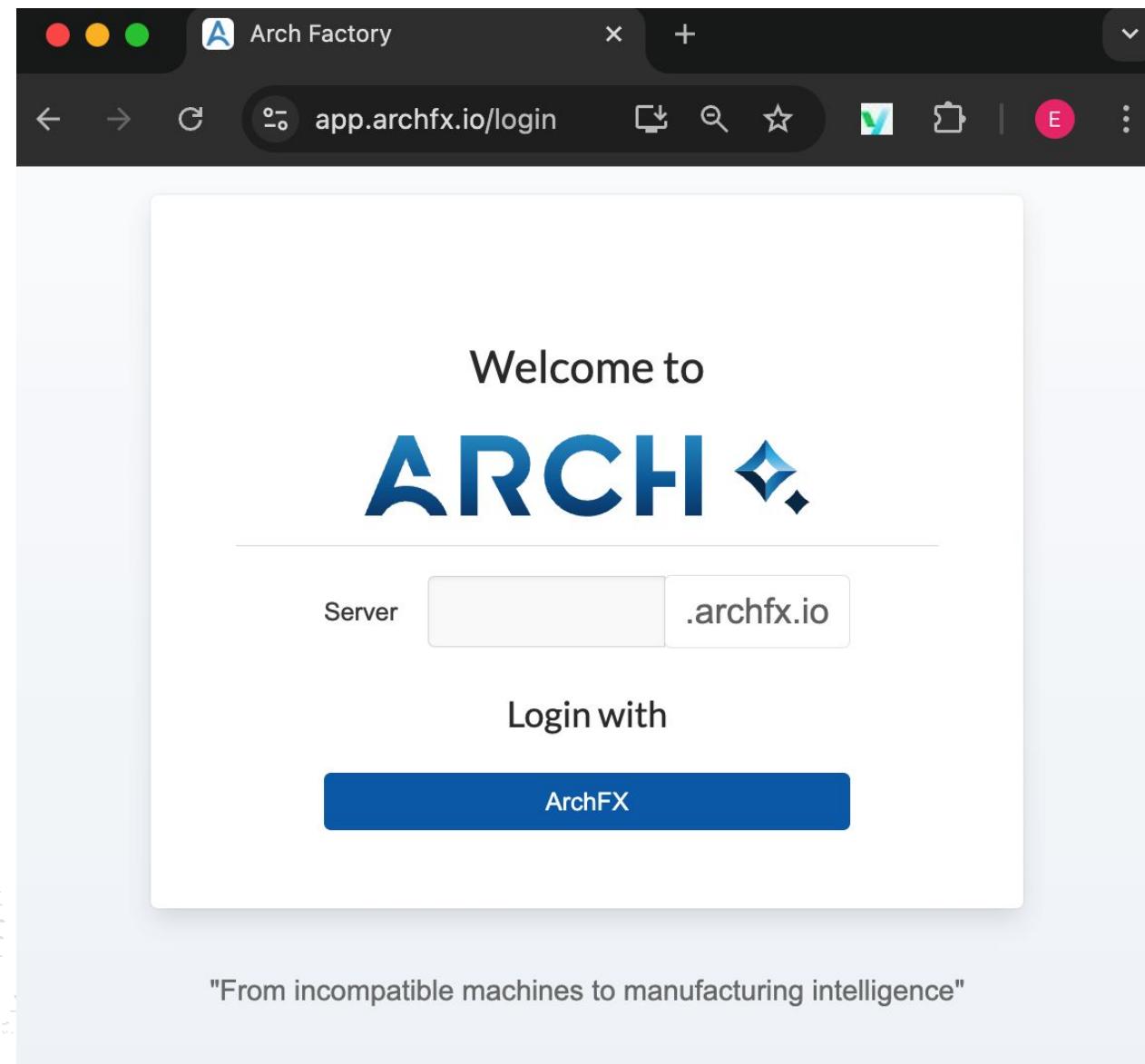
ArchFX Action Manager basics

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

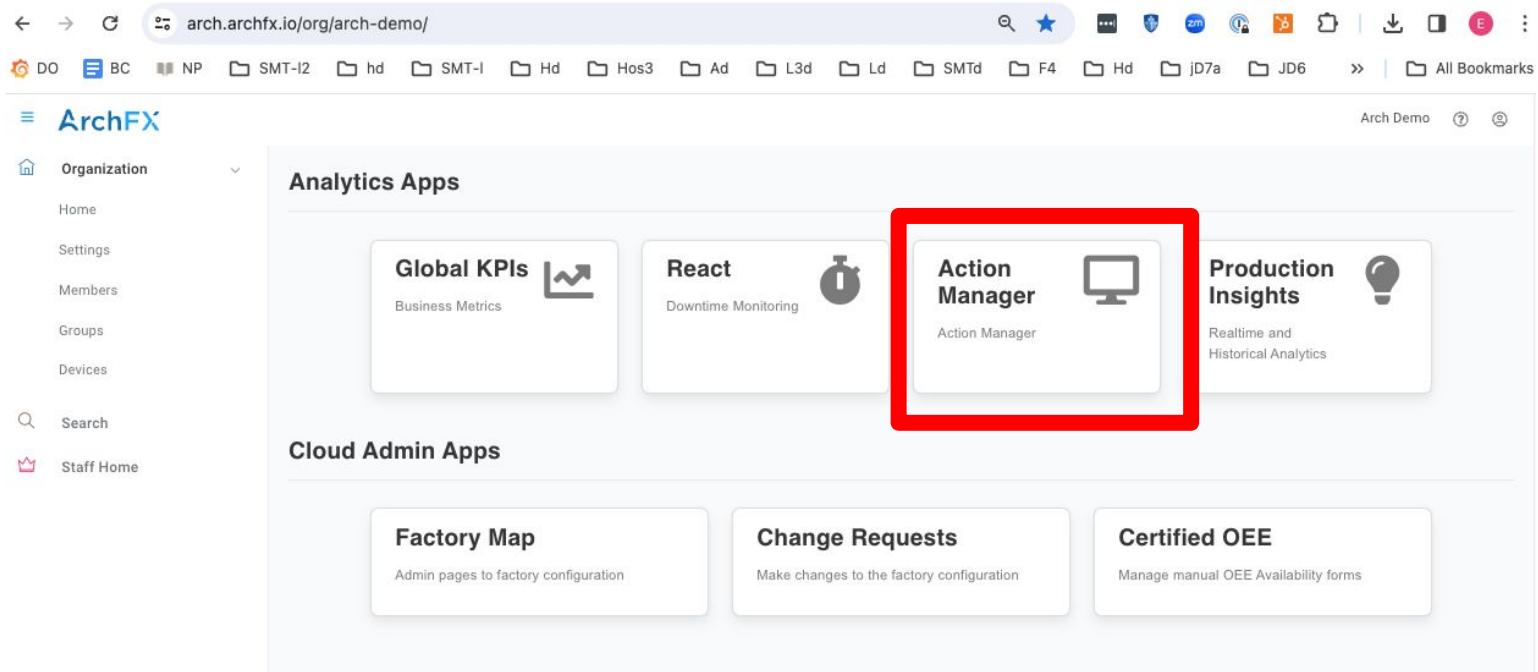
User logs in to ArchFX Cloud

Enter customer name after “Server”



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

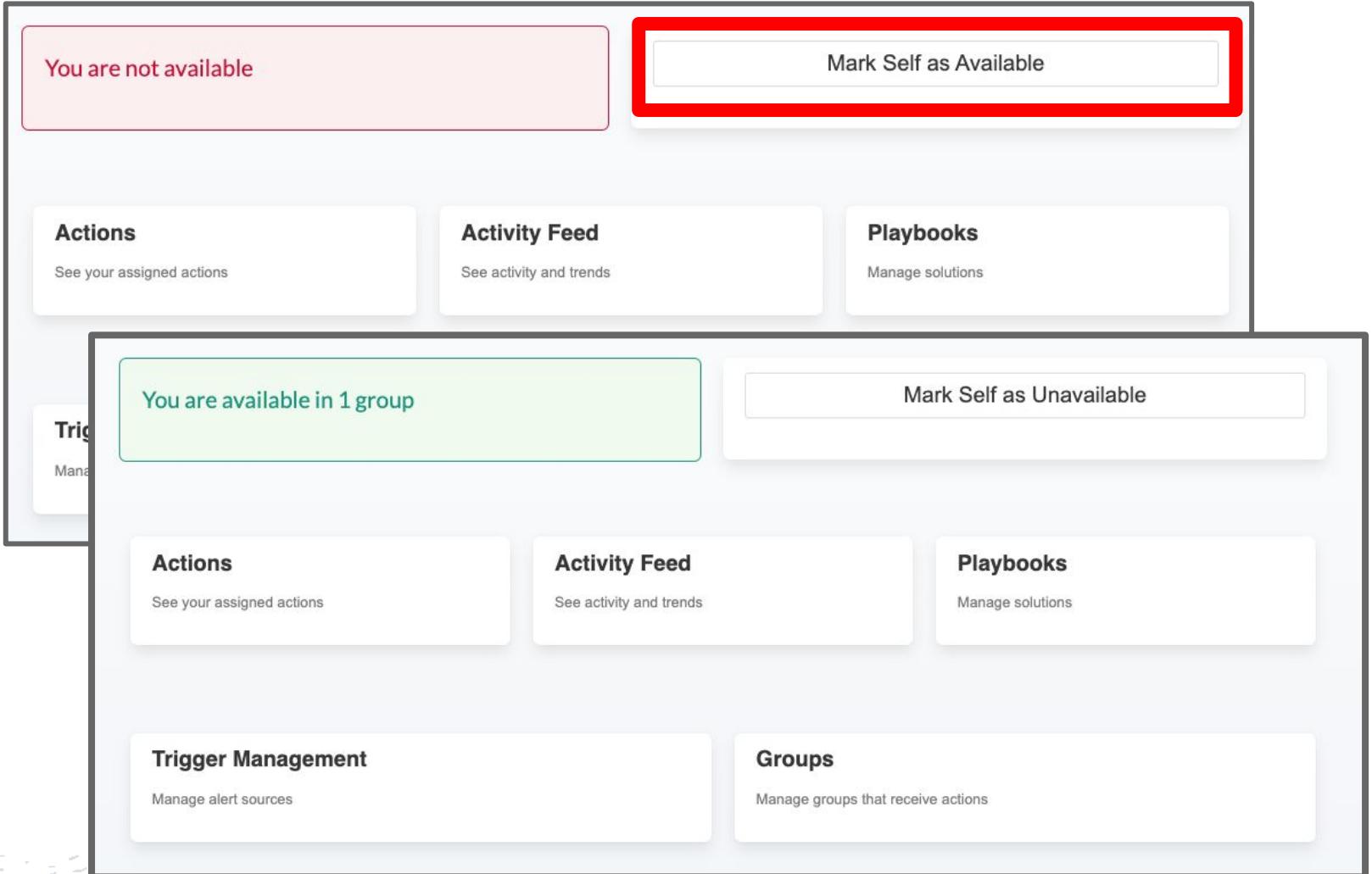
Groups

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

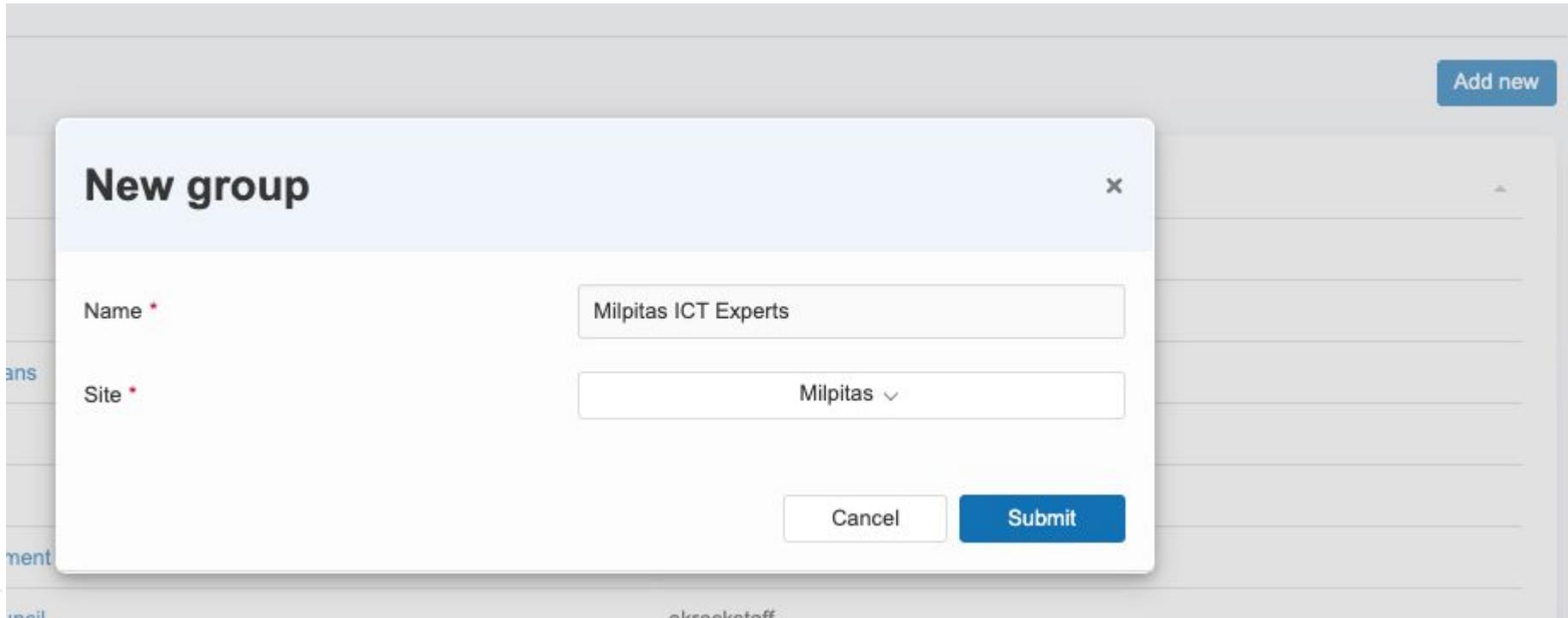
Groups

Filters: Site ▾

Add new

	Created by
All	
NaN	acorona
Guadalajara N	
Guadalajara N - Mechanicals	
Guadalajara S	acorona
Milpitas	acorona
Milpitas Old	sreemarchsysio
Suzhou Suhong	gmeikarchsysio
Suzhou Suqian	
Guau test group	utthra
Connectivity Management - Milpitas	cponthieu
Local PnP Expert Council	ekrockstaff
Demo Group 2	ekrockstaff

Add new Group



New group

Name *

Milpitas ICT Experts

Site *

Milpitas

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

Module Location

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

Add new trigger

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

Click trigger name to open.

Viewing a Trigger

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

In sync?

Trigger scope

Default Playbook for trigger.

Action Manager / Trigger Management / Attrition Monitoring

Profile

[Details](#) [Routing](#)

Status In-sync

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

Description Attrition > 1%

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

Default Playbooks

Attrition exceeds Threshold Remove

Add new playbook

Delete

Save

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

Trigger Routing Tab

Action Manager / Trigger Management / Attrition Monitoring

Profile

Details **Routing**



Delete trigger

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

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?

Step #2

Assign to

Delete

Company PnP Experts

Assignment option

Automatically assign to a random user

Notification Type

Email

Default Priority

▼

Add Escalation level (Routing step)

Add escalation level

Playbooks

Types of Action Manager Playbook administrator users

User Type	Permission settings	Capabilities
Site Playbook administrator	has can_manage_action_manager_playbook 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 can_manage_action_manager_playbook 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

Add

<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 Playbook

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

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Draft tab of in-development playbooks

Action Manager

Playbook

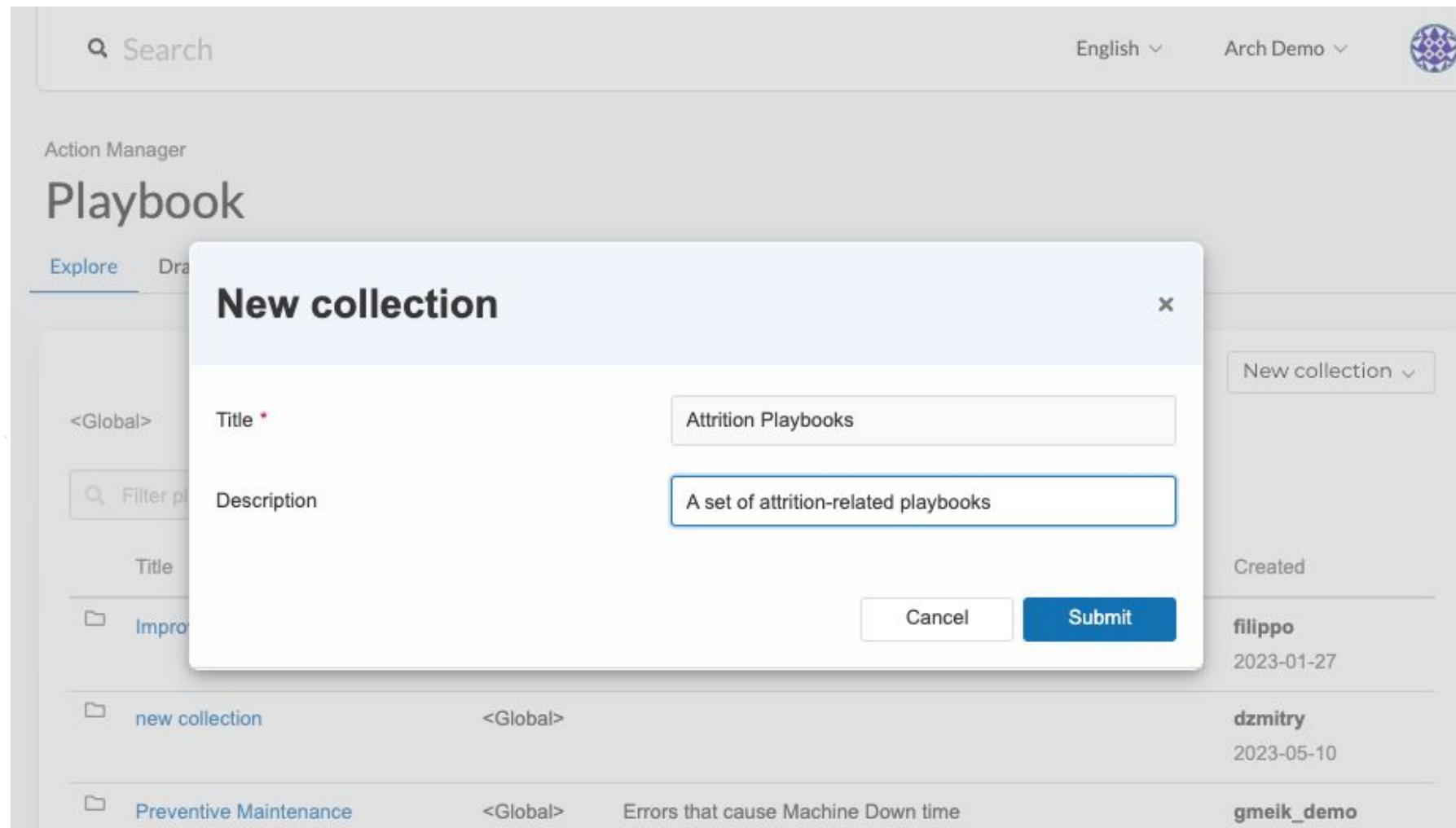
Explore **Draft**

<input type="text"/> Site <input type="text"/> Status				
Title	Location	Approval level	Description	Status
Guadalajara Playbook	Guadalajara N		Steps to resolve attrition in Guadalajara	Draft
playbook (copy - 2)	<Global>		aaaaa	Draft
Copy of playbook	<Global>		aaaaa	Draft
Playbook (copy - 1)	<Global>		aaaaa	Draft
Test Playbook	<Global>		aaaaa	Draft
Attrition > Threshold	Milpitas		Steps when attrition is over the threshold	Draft
C of Test Utthra Playbook	Guadalajara N	site	Test Utthra Playbook	Rejected
Test Utthra Playbook	Guadalajara N	site	Test Utthra Playbook	Draft
test playbook quality	<Global>		test playbook quality	Draft

Add Playbook

Create new collection of playbooks

Add → New collection to create a new collection of playbooks



The screenshot shows a software interface for managing playbooks. At the top, there is a search bar, language selection (English), a dropdown for 'Arch Demo', and a user profile icon. Below the header, the 'Action Manager' and 'Playbook' sections are visible. A modal dialog box is open in the center, titled 'New collection'. It contains fields for 'Title' (Attrition Playbooks) and 'Description' (A set of attrition-related playbooks). At the bottom of the dialog are 'Cancel' and 'Submit' buttons. In the background, a list of existing playbooks is shown, including 'Attrition Playbooks' (Created by filippo on 2023-01-27), 'new collection' (Created by dzmitry on 2023-05-10), and 'Preventive Maintenance' (Created by gmeik_demo on 2023-05-10). The 'Attrition Playbooks' entry in the list corresponds to the one in the dialog.

Playbook	Created	Created by
Attrition Playbooks	2023-01-27	filippo
new collection	2023-05-10	dzmitry
Preventive Maintenance	2023-05-10	gmeik_demo

A Create new playbook

Add → New entity to create a new playbook

The screenshot shows the Arch Demo interface for creating a new playbook. The top navigation bar includes a search bar, language selection (English), a dropdown for 'Arch Demo', and a user profile icon. The main header 'Action Manager' and 'Playbook' are visible. On the left, a sidebar lists categories like '<Global>', 'Title', 'Impro', and 'new c'. The central area is a modal titled 'New Playbook' with fields for 'Title' (Guadalajara Attrition Playbook), 'Description' (Steps to resolve attrition in Guadalajara), 'Collection' (Test Collection), and 'Site' (Guadalajara N). A 'Submit' button is at the bottom right of the modal. To the right of the modal, a list of entities is shown with columns for 'Created' and 'Name'. The first entity is 'filippo' (Created 2023-01-27), and the second is 'dmitry' (Created 2023-05-10). At the bottom, there are links for 'Preventive Maintenance', '<Global>', 'Errors that cause Machine Down time', and 'gmeik_demo'.

Search English Arch Demo

Action Manager

Playbook

Explore Draw

New entity

Created

filippo 2023-01-27

dmitry 2023-05-10

gmeik_demo

New Playbook

Title *

Guadalajara Attrition Playbook

Description *

Steps to resolve attrition in Guadalajara

Collection *

Test Collection

Site

Guadalajara N

Cancel Submit

<Global> Preventive Maintenance <Global> Errors that cause Machine Down time 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 Edit

Steps to resolve attrition in Guadalajara

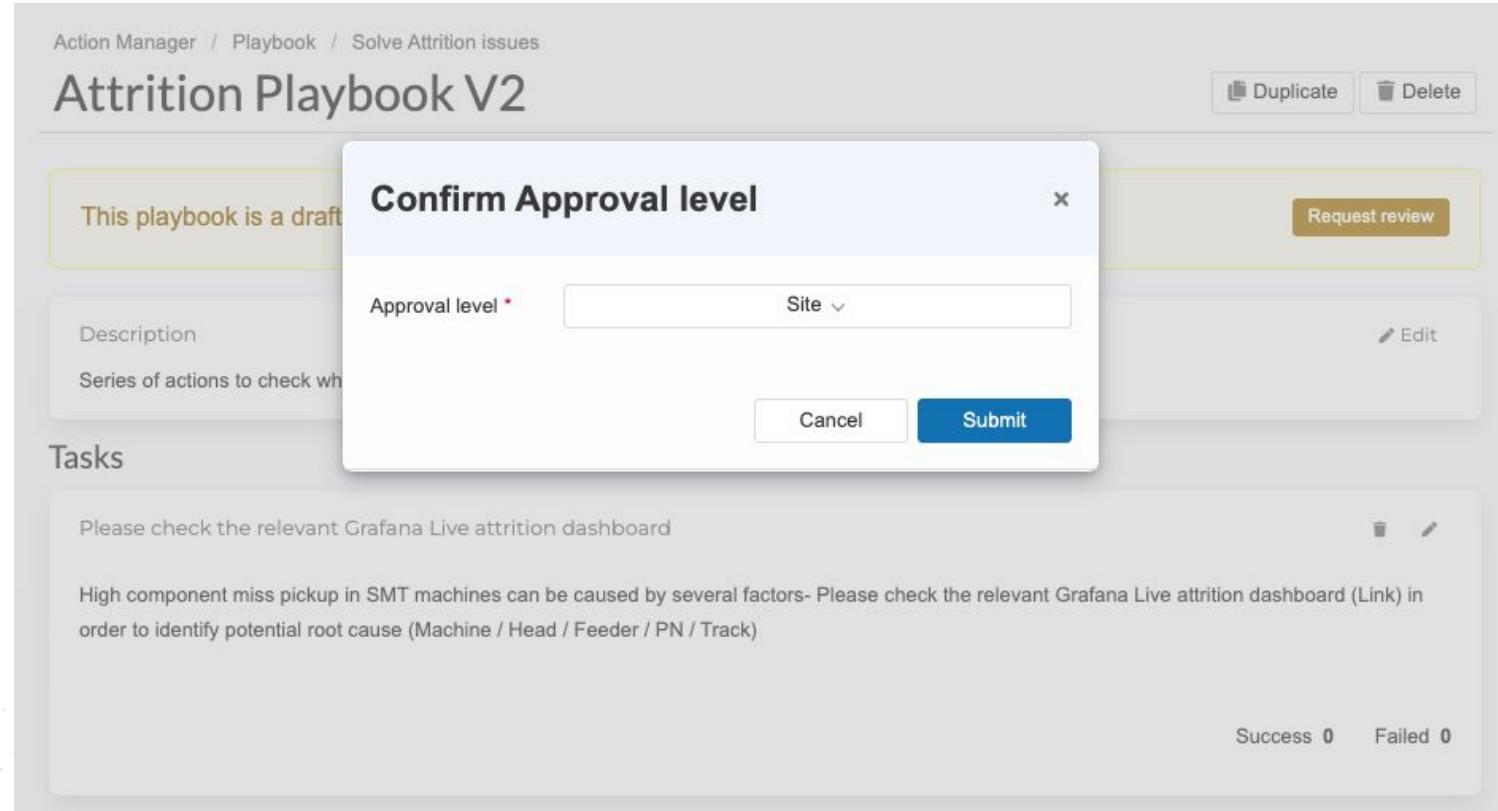
Tasks

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

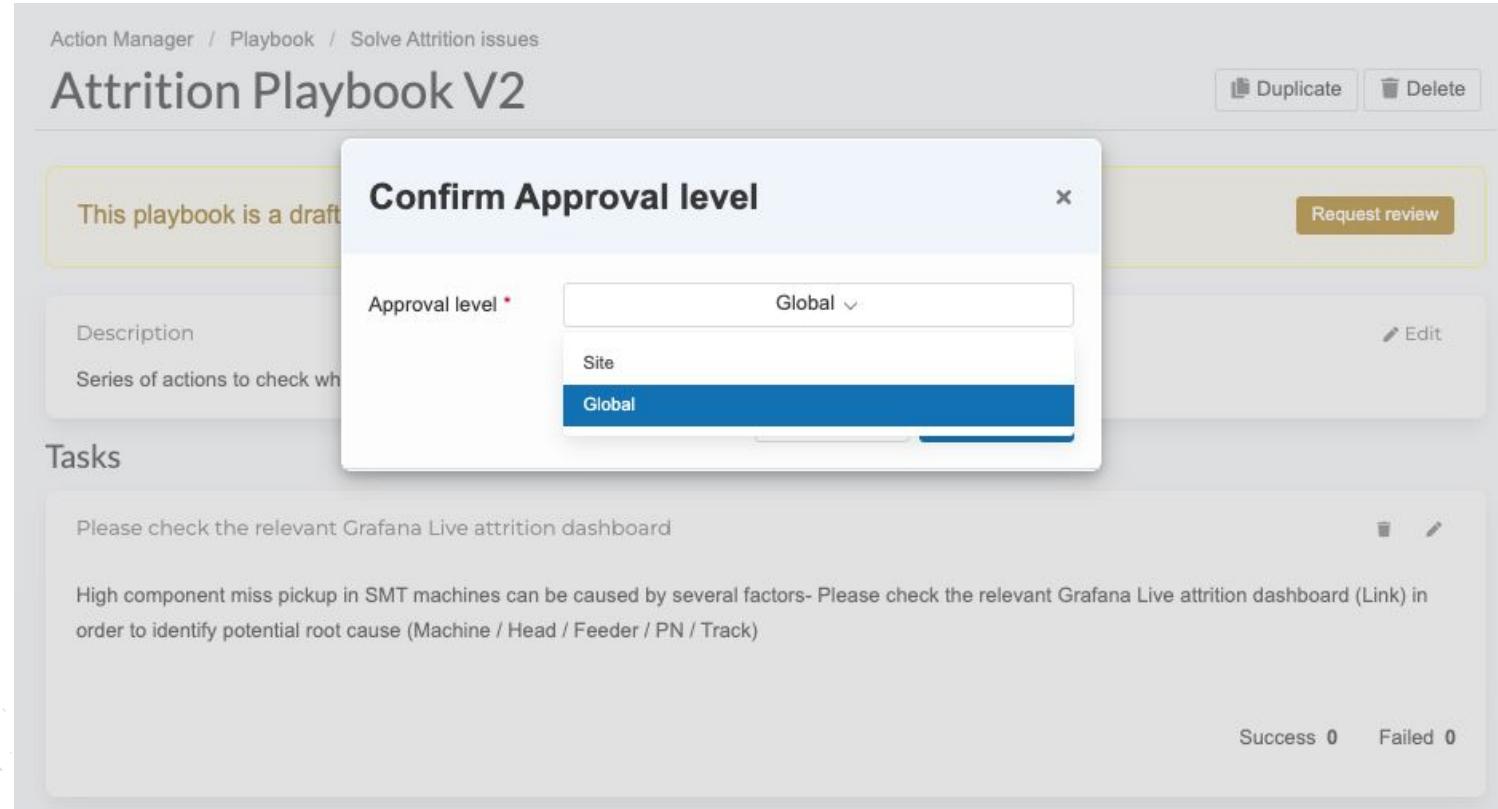
Request review: site-level review



- 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



- Playbook will 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/translates 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

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Actions tab shows pending actions

Action Manager

Actions

Search: Status: Module: Priority: Milpitas: B6: Line: Machine:

My Assigned Actions

Title	Module	Created	Site	Area	Line	Machine	Assigned To	Status	Priority
No action was found									

First Prev Next Last

Other Actions

Title	Module	Created	Site	Area	Line	Machine	Assigned To	Status	Priority
Machine Connectivity	Machine ...	6 days ago	Milpitas	B6	Milpitas - ...	PnP	ericdemo	Pending	
Machine Connectivity	Machine ...	6 days ago	Milpitas	B6	Milpitas - ...	SPI	ericdemo	Pending	
Machine Connectivity	Machine ...	6 days ago	Milpitas	B6	Milpitas - ...	Printer	ericdemo	Pending	
Machine Connectivity	Machine ...	6 days ago	Milpitas	B6	Milpitas - ...	SPI	ericdemo	Pending	
Machine Connectivity	Machine ...	14 days ago	Milpitas	B6	Milpitas - ...	PnP	ericdemo	Expired	
Machine Connectivity	Machine ...	14 days ago	Milpitas	B6	Milpitas - ...	SPI	ericdemo	Expired	
Machine Connectivity	Machine ...	14 days ago	Milpitas	B6	Milpitas - ...	Printer	ericdemo	Expired	
Machine Connectivity	Machine ...	14 days ago	Milpitas	B6	Milpitas - ...	SPI	ericdemo	Expired	
Machine Connectivity	Machine ...	21 days ago	Milpitas	B6	Milpitas - ...	AOI	ericdemo	Resolved	
Machine Connectivity	Machine ...	21 days ago	Milpitas	B6	Milpitas - ...	Printer	ericdemo	Resolved	
Machine Connectivity	Machine ...	21 days ago	Milpitas	B6	Milpitas - ...	AOI	ericdemo	Ignored	

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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

Created 2 minutes ago

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

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

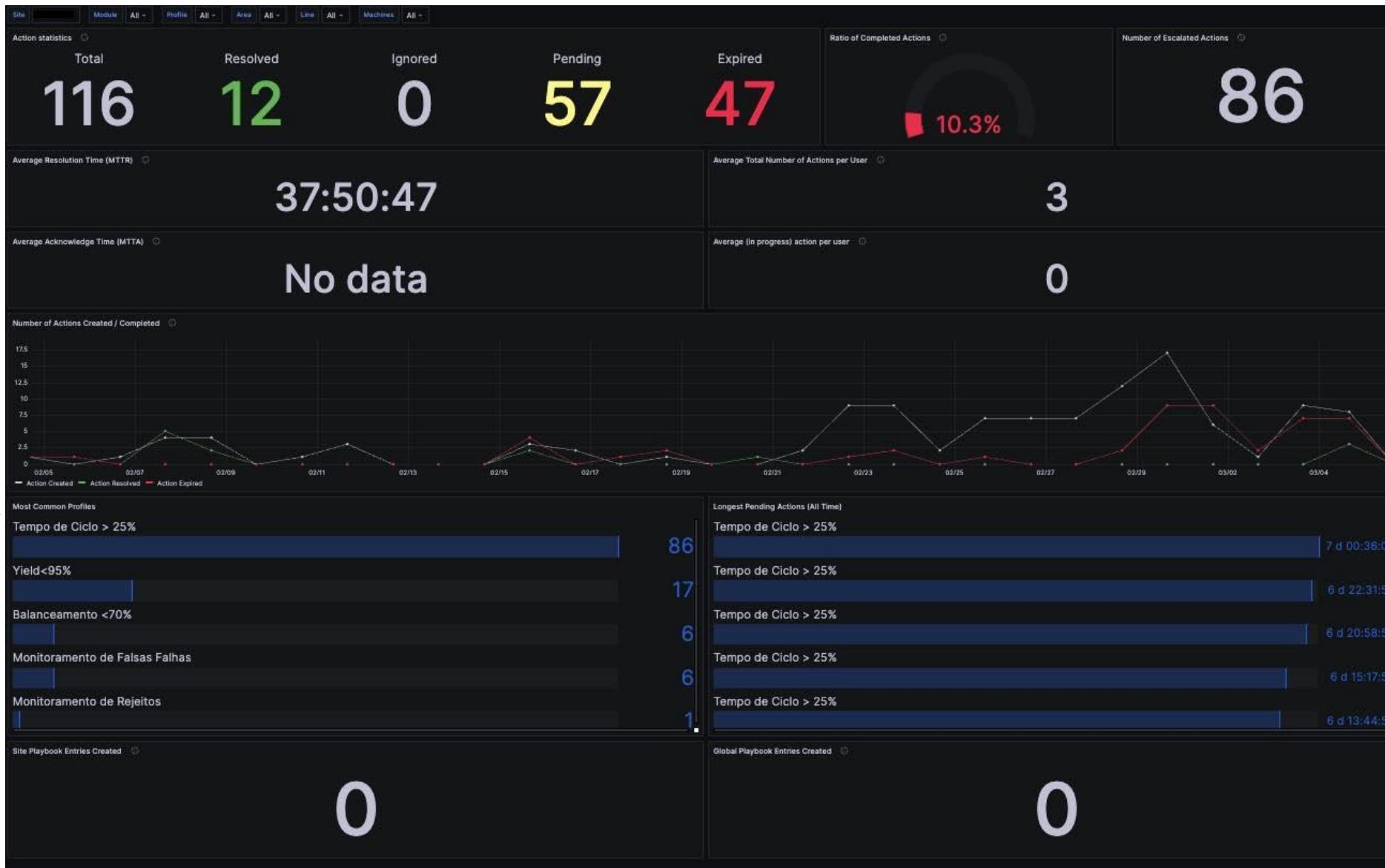
January 15, 2025 at 17:04

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

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Questions?

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Arch Systems

