# Table of Contents

**Welcome to Envision** .................................................................................................................. 9  
**What’s New** .................................................................................................................................. 10  
**More Information** ......................................................................................................................... 11 

**Installation Introduction** ............................................................................................................. 12 
**Installation** .................................................................................................................................... 12  
  **Envision Pilot Checklist** ................................................................................................................. 12  
  **Customer Requirements** ............................................................................................................... 12  

**Software Application** .................................................................................................................. 13  
**Navigation** ..................................................................................................................................... 14  
  **Plant Navigation** .......................................................................................................................... 14  
  **Main Tree Object and Description** .............................................................................................. 14  
  **How to Navigate with ENVISION** .............................................................................................. 15  
    **Top Navigation Bar** ..................................................................................................................... 15  
    **Main Tree Navigation** ............................................................................................................... 15  
    **Object String Navigation** ........................................................................................................ 15  
    **Object Tree** ............................................................................................................................. 16  

**Cycle Browser** .............................................................................................................................. 17  
**Location** .......................................................................................................................................... 17  
**Cycle View Browser Break Down** ................................................................................................. 18  
**Selecting a cycle** ............................................................................................................................ 19  
**View Types** ...................................................................................................................................... 20  
**Heartbeat View** ............................................................................................................................. 20  
**Sequence View** .............................................................................................................................. 20  
  **Object Properties** ......................................................................................................................... 22  
**Distribution – Cycle View** ............................................................................................................. 23  
**Baseline Editor (Auto Learn)** ........................................................................................................ 24  
  **Opening the Baseline Editor** ........................................................................................................ 24  

**Cycle View Evaluation Module** ..................................................................................................... 26  
**Open Cycle View** ............................................................................................................................ 26  
**Selecting Cycles to Compare** ......................................................................................................... 27  
**Open Cycle Compare Window** ....................................................................................................... 27  
**Configure Cycle Collection** ........................................................................................................... 28  
**Adding More Cycles** ....................................................................................................................... 28  
**Zoom Feature** ................................................................................................................................. 29  
**Deleting a Cycle** ............................................................................................................................. 31  
**Deleting a Collection** ..................................................................................................................... 31
Cycle Toggle Feature ............................................................................................................ 32
Reference ............................................................................................................................ 33
Cycle Compare (Collection) Window...................................................................................... 33
Adding Addition Cycles ...................................................................................................... 33
Notes .................................................................................................................................. 34
Opening Notes ..................................................................................................................... 34
Select Common Notes ........................................................................................................ 34
Enter Custom Note ............................................................................................................. 34
View Notes ............................................................................................................................ 35
Cycle History ...................................................................................................................... 36
Color Code ........................................................................................................................... 36
Location ................................................................................................................................ 37
History Filter Options ......................................................................................................... 38
Bar Chart ............................................................................................................................... 38
Parameter History ............................................................................................................... 38
Table View in New Window (v2.4 or lower). ....................................................................... 38
Export last 1000 Cycles to Excel ....................................................................................... 39
Toggle Filter Good ................................................................................................................ 40
Toggle Filter Watch ............................................................................................................. 40
Toggle Filter Warning ......................................................................................................... 40
Toggle Filter Fault ............................................................................................................... 40
Toggle Filter Missing .......................................................................................................... 40
Toggle Trend Line ................................................................................................................ 40
Collapse Table .................................................................................................................... 40
Cycle Date Options ............................................................................................................ 41
Cycle History View types .................................................................................................... 43
History View ........................................................................................................................ 43
Model View .......................................................................................................................... 43
Table View ........................................................................................................................... 43
Cycle History Day View ..................................................................................................... 44
Cycle History Higher Level View ....................................................................................... 45
Production Counts in a New Window ................................................................................ 46
Opening the Production Counts ......................................................................................... 46
Parameters Window ............................................................................................................ 46
Select Date Range .............................................................................................................. 46
Efficiency ............................................................................................................................. 47
Select Area ............................................................................................................................ 47
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Target Rounding</td>
<td>47</td>
</tr>
<tr>
<td>Change Parameters</td>
<td>47</td>
</tr>
<tr>
<td>Reporting</td>
<td>47</td>
</tr>
<tr>
<td>Dashboard Overview</td>
<td>48</td>
</tr>
<tr>
<td>Dashboard Item and Description</td>
<td>49</td>
</tr>
<tr>
<td>Dashboard Item and Description</td>
<td>50</td>
</tr>
<tr>
<td>User Dashboards</td>
<td>54</td>
</tr>
<tr>
<td>Filter</td>
<td>54</td>
</tr>
<tr>
<td>Create New Dashboard</td>
<td>55</td>
</tr>
<tr>
<td>Import Dashboard</td>
<td>56</td>
</tr>
<tr>
<td>Template Actions</td>
<td>57</td>
</tr>
<tr>
<td>Run</td>
<td>58</td>
</tr>
<tr>
<td>Optional Filters</td>
<td>58</td>
</tr>
<tr>
<td>Realtime (Current Shift)</td>
<td>59</td>
</tr>
<tr>
<td>Edit</td>
<td>60</td>
</tr>
<tr>
<td>Editing Toolbar Tab</td>
<td>60</td>
</tr>
<tr>
<td>Delete</td>
<td>62</td>
</tr>
<tr>
<td>Copy</td>
<td>62</td>
</tr>
<tr>
<td>Subscribe 00</td>
<td>63</td>
</tr>
<tr>
<td>Optional and Email Settings</td>
<td>63</td>
</tr>
<tr>
<td>Export</td>
<td>64</td>
</tr>
<tr>
<td>User Dashboard Menu</td>
<td>65</td>
</tr>
<tr>
<td>Save</td>
<td>65</td>
</tr>
<tr>
<td>Data Sources</td>
<td>65</td>
</tr>
<tr>
<td>Create Data Source</td>
<td>66</td>
</tr>
<tr>
<td>Filter Editor</td>
<td>66</td>
</tr>
<tr>
<td>Creating a Calculated Field</td>
<td>67</td>
</tr>
<tr>
<td>Add Calculated Field</td>
<td>67</td>
</tr>
<tr>
<td>Title</td>
<td>68</td>
</tr>
<tr>
<td>TEXT</td>
<td>68</td>
</tr>
<tr>
<td>ALIGNMENT</td>
<td>68</td>
</tr>
<tr>
<td>IMAGE</td>
<td>68</td>
</tr>
<tr>
<td>PREVIEW</td>
<td>68</td>
</tr>
<tr>
<td>Parameters</td>
<td>69</td>
</tr>
<tr>
<td>Name</td>
<td>69</td>
</tr>
<tr>
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<td>69</td>
</tr>
<tr>
<td>Type</td>
<td>69</td>
</tr>
</tbody>
</table>
Quick Jump Table of Sections

Click on a Icon to go to the section (when opened in PDF).
Welcome to Envision

ENVISION enterprise solution helps companies to optimize automation processes, minimize unnecessary maintenance, and increase production throughput. In the scope of process diagnostics and quality management, ENVISION’s patented technology is a quantum leap beyond traditional motion sensing diagnostics tools.

Whereas existing diagnostic tools use vibration sensors or other signals, ENVISION creates digital traces of all sets of events pertaining to the automated or manufacturing processes. Envision solution LISTENS to the rhythm of machine and automated operations; ILLUMINATES untapped and currently invisible process data to pinpoint possible problem areas before a critical failure; and TRANSFORMS how systems’ operational and quality performance is measured and managed.

CAPTURING THE HEARTBEAT OF AUTOMATION: ENVISION monitors and records every automated motion and process in real-time. ENVISION actually acts as an EKG of an automated system – comparing the actual process performance against ideal (design intended) cycle time to gauge the health of the system.

Beet Analytics Technology brings the power of digital technology and advanced knowledge of factory automation together, creating a powerful Automation Intelligent System, ENVISION™.

ENVISION demystifies the industrial operations by digitizing each automated process down to every minute detail and presents it in a simple and intuitive way.

ENVISION enables true Preventive Maintenance to minimize downtime, improve production throughput and achieve faster problem solving.

ENVISION creates a competitive advantage by addressing key operational challenges including:

- Provides accurate real-time and historical machine and process performances information to the right user at the right time.
- Enables proactive preventive maintenance by highlighting potential problem areas and providing prioritized list of “Hotspots” in the manufacturing and automation processes.
- Enables all users to monitor and analyze the system performance anywhere via web.
- Delivers high return-on-investment by increasing throughput, reducing machine downtime and achieving faster root-cause analysis.
What’s New
Click on an Image icon or link, to go to the New Feature Sections.

- System Health Monitor
- BI Reports and Dashboard
- Hotspots Pivot Table
- Hotspots Filtering Feature
- Cycle View Distribution Bar Chart
- Production Monitor Filter
- PM Show/Hide Feature
- Auto Learn Baseline Editor
- Dashboard Reports
More Information

This Document has an Hyperlinking Icons feature that will allow you to jump to the Table of Contents and a Quick Jump Table of Sections from anywhere in the document, when it is downloaded and opened in PDF format. When this document is opened in PDF, use the logo at the top left in the upper header, to jump to the Table of Contents and use the page number or this icon in the upper right corner of the upper header, to go to the Quick Sectional Jump for ease of navigation.

This feature makes it easier to navigate will using a PDF reader on Smartphone, Tablet, and Computer.
Installation Introduction

Installation

Envision Pilot Checklist

1) Update all hot fixes in Windows and Drivers
2) Update Software / Application
   a) Check/Update Kepware License
   b) Check/Update OPC System License
   c) Check/Update Envision License
3) If there is SAN,
   a) Network Cable from SPA/SPB to Switch
   b) Fiber Cables connect to Server HBAs
   c) Follow SANs Checklist
4) KVM Switch
   a) EAS (Envision Application Server)
   b) EDC (Envision Data Collector)
5) UPS check Battery Condition
6) Connect Monitor / Keyboard / Mouse Console
7) Network Cable from Servers to Switch
8) Network Cable from RSAs to Switch
9) VPN Installed and Tested
10) 200 ft of CAT5e Extension cord
11) NEMAL 620-ft Extension cord
12) 2 IP be able to accessed Internet
13) 1 IP for PLC

Customer Requirements

1) NEMAL-30R
2) 1-portonPLC
3) 1-portonLAN
4) Loaner Agreement Signed
5) Shipper Document Signed
Software Application

Envision features many helpful tools to help maximize productivity. The following section describes those features in detail, as well as giving instruction on how to use them.

- **Navigation**
- **Cycle Browser**
- **Cycle View Evaluation Module**
- **Cycle History**
- **Production Counts in New Window**
- **Hotspots**
- **Notes**
- **Scheduling**
- **Production Monitor**
- **Reporting and Dashboard**
- **Reports**
- **Dashboard**
- **Run**
- **Subscribe**
Navigation

Plant Navigation

In ENVISION, your plant is broken down into a hierarchy of manufacturing categories.

The Factory Plant defines the organizational tree down to the component level. The top 3 levels (Areas, Lines, and Stations) are used to organize the tree into a meaningful and friendly navigation structure. The lower 2 levels (Assets, Groups) are the data objects.

Main Tree Object and Description

**AREA**  The Area of the Plant where a particular assembled part is built (example: RWD and FWD Transmission Assembly Areas).

**LINE**  A part/place of the Area that is responsible for assembling a part of the assembly (Example: Internal and External parts assembly Lines).

**STATION**  A Station within the Line that is responsible for the collection of Assets (Example: Gear build, valve body, and torque converter build Stations).

**ASSETS**  Assets are used to define a repeatable set of motions/activities (Groups) that have defined Start and End signals (Example: Builds the Valve body and inspects/quality check assets).

**GROUPS**  A Group is a collection of OPS (individual motions/event data objects). Assets are a collection of Groups that describe a particular sequence of events that comprise one complete cycle for the Asset (Example: A part enters On-Deck, then Part is present On-Deck, signal to show OP is complete).
How to Navigate with ENVISION

Navigating to the area of your plant you would like to monitor can be done at any time using the top navigation bar in the ENVISION browser. Navigate to any object to view in depth critical performance data. If you are reopening, it may return to the area of the object tree you were previously viewing. If not, then it will open to the Dashboard with only the Object Tree. Select the Object Tree Icon to proceed.

Top Navigation Bar

When first opening Envision, it will open to the Dashboard window. The head navigation bar can be found at the top of your ENVISION browser.

1. The top navigation area can be used to access any of the different features of Envision: Dashboard, Cycle view, Hotspots, Reporting, and Notes.

2. The plant breakdown can be used to navigate to the object you want to view.

Main Tree Navigation

Click Object Tree on the navigation bar to open the Main Tree window to navigate to the Object desired.

Object String Navigation

You can also navigate by using the Object String next to the Object Tree Icon. Click on the Object label Icon to open a window to proceed to the next level down. Or hover over an Object label and a drop down option will appear to go to the next level down.
Select the box next to each item to further expand the areas. Continue to expand areas until you reveal the object you desire, then **Click** on the Object to open the cycle browser. This will open the browser window with the last 100 cycles.

Click on the Cycle View Tab at the top of the browser to open the cycle view. Once selected, the Cycle view browser will open with the Last 100 cycles in the History Display Panel, displayed for that object.

The upper graph will be empty (No Cycle Selected), until you select a cycle to view. Simply select a cycle to view by Clicking on the lower graph (History Display Panel) in the Cycle view browser.
Cycle Browser

- Location
- Selecting a Cycle
- View Types

The cycle browser provides graphical data on your processes cycle status, including the machine heartbeat. The Cycle Browser has two main displays, the Cycle View Upper display and the History Display panel.

Location

Make sure you have the Cycle View tab selected on the ENVISION top menu.

You can then access the cycle browser by using the Main Tree window to navigate to your desired object. Click on the + sign beside the object. This will reveal the lower level objects. Proceed until you reach the object desired. Click on the object and the Cycle Browser will open. After selecting the desired object, the cycle browser will launch to this browser. A cycle has not been selected yet, so the upper graph will be empty and say No Cycle Selected.
Cycle View Browser Break Down

Top Navigation Bar

Object Tree Navigation String

Object/Model Properties Bar

Cycle View Browser - Heartbeat Mode

Cycle View Menu Bar

Cycle View Browser - Sequence Mode

Day View Navigator

History Filter Control Panel

History Display Panel
Selecting a cycle

To Select a cycle, go to the bottom of the cycle browser, known as the History Display Panel. From here you can select a cycle to view in the Upper Graphical area of the cycle browser. While browsing over the History Display Panel, you can hover over a cycle to view the details of that cycle. Select a cycle by clicking on that cycle. After you click on it, a white line will appear above the selected cycle, and the upper window will update with the selected cycle.
View Types
Located in the top right of your cycle browser, are 2 buttons to change the views to either Heartbeat or Sequence.

Heartbeat View is the default view. The Blue Heartbeat Baseline can only be viewed in Heartbeat view.

Sequence View contains state labels which can only be seen in the sequence view.
View Options
Below is a list of View options you can apply to your cycle view. These buttons are in the top right corner of the cycle browser, they are Cycle view tabs. X-Axis, Baseline, Tolerance, and States. The **Baseline** can only be viewed in the Heartbeat view as the **States** tab is only active in the Sequence view as shown in the figures below.

Below is a list of options you can apply to your Cycle view.

1. **X-Axis**
2. **Baseline**
3. **Tolerance**
4. **States**

Toggle **X-Axis** button to show or suppress x-axis labels.

Toggle **Baseline** to show the Heartbeat of the machine by blue line or Blue bracket in Sequence mode.

Toggle **Tolerance** button to suppress or show if the object is in the allowable range to maintain a healthy state.

Toggle **States** to suppress or show the State Labels in Sequence view only.
Object Properties

The Object Properties are located in the top left of the cycle browser. Model, AGV, Part, CycleNumber, Cycle time, and time data can all be located here. The highlighted Cycletime is dependent on the status of the cycle displayed. It can be Green (Good), Yellow (Watch), Orange (Warning), Purple (Missing), or Red (Fault).

- Good / Green - Normal, Optimum Performing Range
- Watch / Yellow - Watch, Not Optimum but within defined Tolerance window.
- Warning / Orange - Warning, Outside Defined Tolerance Window
- Fault / Red - Fault
- Missing / Purple - Missing Data due to Stoppage or Missing Input/Output.
Distribution – Cycle View

To view the last 100 cycles or the current cycles in the History Display panel, you can use the Distribution button. By selecting this action, it will open a distribution bar between the History Display Panel and the Upper graphing areas. It will display all the Status States in an easy to read stacked bar graph.

It displays Good Time, Non-production, Over Cycle, Blocked, Starved, Faulted and Idle.

It can also perform the same functions on a selection of cycles.

Note: This function does not apply to using the zoom feature.
Baseline Editor (Auto Learn)

The Learned Baseline Editor is an application/tool within the ENVISION Cycle browser, that can take a selection of objects at the Asset level and filter the data values to view the baseline data. Within the Learned Baseline Editor, lies a baseline table that you can filter and sort to see the data averages of certain values.

Opening the Baseline Editor

The Learned Baseline Editor can only be used in the Cycle View browser. Open the Cycle View browser and drill down to an Asset level. In the lower part of the Cycle View browser (History Display Panel). Select a cycle from the History Display Panel. From there, navigate to the upper part of the Cycle View browser, on the upper right above the upper graph window. Select the light blue button with the oxford cap (graduation cap) on it.

![Baseline Editor](image)

1. Select a cycle from the History Display Panel.

2. Click on the Baseline Editor button to open the Learn - Baseline Editor window.

After selection of the Baseline Editor button, the Learn – Baseline Editor setup window will open. It displays an editing area, Select Learn Mode and Select # of Cycles, where you can select the number of Cycles to display. You can choose up to ~ 1000 cycles if needed. After you select the number of cycles and Learn mode, click on the Confirm button to the left of the edit box.
After selecting the Confirm button, the **Learn – Baseline Editor** window will open. In this window, it offers a selection of options to filter and sort the available data.

The Object data is separated into three sortable groups: **Model, Group, and Tag**. The available data values are the Events, Mean Cycle Len. (Length), Mode Cycle L (Length), Median Cycle Length, Min Tol. (Minimum Tolerance), Max Tol. (Maximum Tolerance), Min Normal (Minimum Normal), and Max Normal (Maximum Normal). All the Tolerance Values are read from the Classification section in the Admin Module.

To sort the Object data columns, you can utilize the **filtering feature** to the right of each edit box. Clicking on it reveals your filtering choice. Click on the filter button and input the object value and it will start to auto display some choices. After a single row has been changed or altered in any way, click the **Update button**. Click the **Update All button** when all the data changes are completed.

Except for Events and Median Cycle Length, the others can be adjusted by clicking on the value. It will then highlight and offer you a choice to increase or decrease the value. You can also manually input the number to make it exact.

The checkbox for “Overwrite Existing Tolerance Values” will always be unchecked (Default), therefore if the box is checked, then it will Overwrite the existing Tolerance Values.

The Mean, Median, and Modes will read from whichever one is selected. So, make your selection based upon which cycle length value you want it to read from. Click the **Update All button** after your selection.

**NOTE:** When all data is completed, click the **Update All button** to save the work. Not selecting the Update All button will cause a loss of your work. Click Update All before exiting.
Cycle View Evaluation Module

Overview

The Cycle View Evaluation Module will allow users to view multiple cycles at the Asset and Group object level in the cycle view browser. It can be utilized with any cycle, regardless of its status (watch, warning, etc.). The three main parts used for this module is the Cycle View Browser, Cycle Compare (Collection) Window, and the Cycle Compare Browser.

- Open Cycle View
- Selecting Cycles to Compare
- Open Cycle Compare Window
- Configure Cycle Collection
- Adding More Cycles
- Zoom Feature
- Deleting a Cycle
- Deleting a Collection
- Cycle Toggle Feature
- Reference

Open Cycle View

First we need to navigate to get to the Cycle View Browsers, so that the History Display Panel can be accessed.

After opening the ENVISION browser, click on the blue Object Tree icon to open the Main Tree. Navigate the Main Tree to drill down to the Asset or Group level. This module is active at the Asset levels and below.

The Cycle View window will update with the last 100 cycles. Select a cycle from the History Display Panel.
Selecting Cycles to Compare

Once the ENVISION browser is open, select the Cycle view tab from the top menu tab and a new Cycle View window will reveal with the last 100 cycles in the History Display Panel (in the lower browser window).

Select a cycle from the History Display Panel. Once a cycle is selected, it will have a white dash line through the selected cycle, showing that it is selected.

Open Cycle Compare Window

When the cycle is clicked on, the upper display window will show the cycle selected. In the upper right hand side above that window will be the Cycle View Menu bar. On the far right side is the Cycle compare button.

Select the Cycle Compare button, and this will reopen the Cycle compare window, to add additional cycles.

Select another cycle from the History Display Panel.
Configure Cycle Collection

When the Cycle Compare window opens, input a Name for the cycle’s folder, then select the Create a New Cycle Collection button. This will update the window with a new folder (CEM 001) and the first selected cycle. You can click the View button and the upper display will reveal the selected cycle as shown below. This will only show the cycle selected.

Adding More Cycles

To add more cycles, select another cycle from the History Display Panel. Once selected, select the Cycle Compare button. The Cycle Compare window will open. Click on the first cycle that was selected, then select the Save to Collection button in the upper right-hand side of the window. This will add it to your selection. Ensure that you select the correct cycle you want to compare with. If many cycles (assets) are already present in the Cycle Compare window, it is possible to add to a different collection, so selecting the wrong cycle will pair your selection to that cycle instead of the intended one.
Now with 2 (or more) cycles in the Cycle Compare folder (CEM 001) you can select the View button, and this will show the 2 (or more) cycles in the upper browser window.

The cycles will be displayed layered one atop of the other. Hovering over a bar will reveal the details of the cycle. On the left hand side, it will display the cycle information of the cycles selected and stored in the Cycle Compare Collection. To exit this mode, you can select from one of the Cycle View buttons to the right of the window, such as the Heartbeat and Sequence views buttons.

**Zoom Feature**

While viewing the cycles in this cycle compare window, you can zoom in to a collection by click and holding, then drag the zoom selection area over your intended cycles. The selected area will be highlighted, then Update to a zoomed in view on your selection.

**NOTE:** The zoom selection area is highlighted with a deeper color.
The zoomed area is now reopened to the selected area. Click on the Reset Zoom button in the upper right-hand corner of the graphing area. This will return the selection to the original display size (default).

Click the Reset Zoom button to return the graphing area back to its default size.
Deleting a Cycle

From the Cycle Compare Window, select a single cycle from the list in the Cycle Compare window and select the **Delete Cycle** button to delete the cycle selected.

The Cycle Compare window will update to show the Collection Folder CEM 001 and the unselected cycle.

In the event that you deleted a cycle in favor of a different one, you can close the Cycle Compare window and select a different cycle to compare with the remaining cycle. Click on a new cycle in the History View Panel, then click the yellow Cycle Compare button to open the Cycle Compare Collection. Click on the cycle that you want to compare, then click the Save to Collection button. See **Adding More Cycles**.

Deleting a Collection

Select a Collection Folder from the list in the Cycle Compare window, then select the **Delete Collection** button to delete the folder and the cycles in it.

SPECIAL NOTE: Though the data for the cycle and collection have been deleted, it still can be viewed if you have not closed the Enviion Browser or navigated to another collection.

Simply click on the Teal colored cycle compare button under the Heartbeat and Sequence buttons. This will reopen the last cycle compare set that was previously viewed before.
Cycle Toggle Feature

When viewing the Cycle Compare Browser with multiple cycles, it is possible to remove the cycle data from the present Compare window. With two or more cycles displayed, you can click on the left hand side of the window, and select from the cycle information area. Click on any one or more of the Cycle Information tiles to remove from the Cycle Compare browser area. Click on it again to add it back to the browser.

The first cycle will be on the top in the left hand side information window, and will be on the bottom bar on the Compare Cycle Window.

Clicking on the Cycle Information tile will toggle to deselect or select a cycle.

Note: This is only for the cycles that were selected and saved to the collection. You can add additional cycles if needed.
Reference

Cycle Compare (Collection) Window

Adding Addition Cycles

Cycle Compare Browser
Notes
Within Cycle View browser, there is a button you can use to make notes about the object.

Opening Notes
Select Common Notes
Simply Click on the Notes button and a window will open labeled Cycle Notes.
It will offer you a few options to choose from. There are Select Common Notes, Enter Custom Note, and View Notes.
The Select Common Notes, displays a list of the Notes in the current selection or where you are in the cycle view browser.

Enter Custom Note
The Enter Custom Note tab, will allow you to input a note into the Notes database. Simply, Click on the Category space to reveal a drop down menu with
choices. Select the proper Sub Category (Other in this example), then fill in your comments in the Comments section provided. When you are finished, Click Save to hold the position, or x Close.

View Notes

The View Notes tab will let you view the active notes at the object that you are viewing. The Note button will have a red circle with a number in it (number of active Notes). When you click on the Notes button, click the View Notes to display the active notes.
Cycle History

Overview
Cycle history can be used to identify areas of concern quickly. Located on the bottom of the cycle browser, the cycle history window shows the cycles of an object in sequence across a preset date range.

- Color Code
- Location
- History Filter Option
- Export Last 1000 Cycles to xls
- Cycle Date Options
- Cycle History View Types
- Cycle View History Reference Sheet
- Cycle History Day View
- Cycle History Higher Level View

Color Code
The history module provides performance history for any selected objects. Each cycle’s object status is indicated by a color code.

<table>
<thead>
<tr>
<th>Color</th>
<th>Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Toggle Filter Good</td>
<td>Normal, Optimum Performing Range</td>
</tr>
<tr>
<td>2</td>
<td>Toggle Filter Watch</td>
<td>Watch, Not Optimum but within Defined Tolerance Window</td>
</tr>
<tr>
<td>3</td>
<td>Toggle Filter Warning</td>
<td>Warning, Outside Defined Tolerance Window</td>
</tr>
<tr>
<td>4</td>
<td>Toggle Filter Fault</td>
<td>FAULT</td>
</tr>
<tr>
<td>5</td>
<td>Toggle Filter</td>
<td>Missing Data due to Stoppage or Missing Input / Output</td>
</tr>
<tr>
<td>6</td>
<td>Design Time Line Color, the Optimum Value</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Object is inactive or actual Cycle Length is zero</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Select Object or Cycle</td>
<td></td>
</tr>
</tbody>
</table>
Location

Make sure you have the Cycle View tab selected on the ENVISION top menu:

Use the Main Tree navigate to the object you would like to view for cycle information.

Selecting your object will launch the cycle browser. The cycle history module is located in the bottom portion of the cycle browser. Select a cycle from the History Display Panel and the Upper Graphing area will reveal the cycle selected.
History Filter Options
A list of cycle history options highlighted in Red, is located in the top right corner of the bottom window.

**Column Chart** – The Cycle History Panel contains a color-coded graph that indicates cycle statuses for a selected object over a period of time. This is showing the last 100 cycles.

**Bar Chart** is a bar style color coded graph that shows the actual timeline of the object in progress. It shows a visual representation of the uptime and downtime.

**Parameter History**
This displays the Parameter History data in a window within the cycle browser to view. It shows the Parameter and the Value History. This will display within the cycle browser window.

**Table View in New Window (v2.4 or lower)**
This displays a new window with the cycle parameters in a separate window. This window can be moved out of the cycle browsers window so it can be view on a separate monitor if needed.

The table is displayed in the History Display Panel in v3.0 and above.
Export last 1000 Cycles to Excel

This displays a spreadsheet program to view data. Export last 1000 Cycles to Excel

From the Cycle Browser screen, you can select the .xls button to Export the last 1000 Cycles to Excel. This opens a spreadsheet program to view and plot data.

Click on the .xls button and History Export window will open so that you can configure what you want on your report.

First, set the date range by Clicking on the edit box. A calendar will appear. Click on date on the calendar to set the start date. Click again to set the end date. You can also use the presets at the bottom of the calendar window. Check off any of the statuses that you want to omit from you excel report. Check off any Tags you want to omit from your report.

When you are done setting up the excel report, Click the Export button.

The History Report window will disappear and you’ll receive a Notice in a green window that will let you know that it may take several minutes and it will notify you when the download is complete, with another small green window. The download tab at the bottom left of the browser will open and start downloading. When it is finished, Click on the pull down tab to reveal the menu. Choose Open, this will open an excel file with the data configuration that was selected.

An excel document will now open with the data selected. It can now be viewed, plotted, and sent as needed. The file is in your Downloads folder.
**Toggle Filter Good** – Toggle this filter to suppress the Good data cycles

**Toggle Filter Watch** – Toggle this filter to suppress the Watch data cycles

**Toggle Filter Warning** – Toggle this filter to suppress the Warning data cycles

**Toggle Filter Fault** – Toggle this filter to suppress the Fault data cycles

**Toggle Filter Missing** – Toggle this filter to view the Missing data cycles

**Toggle Trend Line** – This turns on a trend line in the lower graph in Column chart view only.

**Collapse Table** – This button will collapse the graph or table in the lower Cycle browser window. When it’s collapsed, hovering over the icon will restore the graph temporarily, until the cursor is moved off the lower graph, then it will collapse again. Click on the icon again to leave it up.
Cycle Date Options

A list of cycle date options, is located in the top left corner of the bottom graph window.

You can also select the date tab on the left to access open a new graph chart, Click on the date range and a calendar will open that can be used to view any date range (Custom Range View).

Simply select the year, month, and date in the Custom Range view, to be included in the selection, by using the drop down tabs on the calendar. Other options are available as well. By selecting the Last 7 days, 30 days, This Month, and Last month, this will open another Graphic chart in the window that will display the selection chosen:
After submitting the select Data Range, this will open another Graphic chart in the middle of the Cycle Browser Window. This will display a section of the dates you picked. An 18 day period was selected for the example below.

18 day selection. Pick the day by clicking on it.
Cycle History View types

There are 4 different view types in the cycle history options tab. In all 4 views, you can **Click** on the green object area to view data for that cycle.

**History View** – Shows the last 100 cycles for a selected object.

**Model View** – Shows the variances for each cycle.

**Table View** – Opens a scrollable table where the graph was.

**Bar Chart** – Show a color coded graph that show the actual timing or the objects in progress.
Cycle History Day View

Use the date panel in the cycle history browser to access the day view for your object. Or **Click** forward or backward to get to the date desired.

Selecting either the "yesterday" or "today" tab will reveal an hourly view for that day in your cycle history browser. Simply select the hour you would like to see a cycle breakdown for.

Doing so will reveal a graph (Hour View) with bars representing each cycle in the selected hour. Roll the mouse pointer over a single bar for more information on that cycle:

Selecting the **Show Day View** tab, from the top menu will reveal history day view variance data:
Cycle History Higher Level View

You can view the cycle history for objects at levels higher than asset or group. Simply Click any folder or labeled object above the asset or group level in the main tree.

Doing so will reveal a history graph indicating the status percentage of the object day-by-day.

You can also view the State Duration by clicking the Cycle Data button in the top right corner to see a graph indicating how long the object was in the fault, blocked, and starved states, day-by-day.

At a Higher level in the Upper graphing area, you can deselect the parameters, by clicking on the name in the legend area. Clicking on the name will remove it from the graphical representation.
Production Counts in a New Window

Opening the Production Counts

To open the Production Counts in a new window, go to the upper right hand side of the Cycle View Browser. Click on it and it will open a new window with and Parameters window within it.

Parameters Window

In the parameters window is where you configure the data you would like to view.

Select Date Range

To start, input a date ranges by clicking on the Select Date Range edit box. This action will reveal a calendar set that will allow you to select a date range. Click once to select the starting or end date. Click again on a date before or after to include the days in between your selections.

Your selected date range will appear in the edit box and above the calendar selection widget. When your date range is correctly configured, click on the Close button to continue.
Efficiency

The Efficiency parameter is set at a default value. If it is not what is desired, then it can be changed simply by selecting within the edit box and changing it to the desired value.

Select Area

Click on the edit box to reveal a drop down menu. In the drop down menu, will be the areas that are currently present in the Envision. Select the correct area you would like to view.

Hourly Target Rounding

The Hourly Target Rounding feature allows you to Round Down or Round to the nearest whole number. Simply select one of the choices:

When all items are complete, check over your inputted values. If everything is as you desire, the click the button.

Change Parameters

If changes in the parameters entered are needed, then simply click the button to re open the Parameters window. Make your changes then click button to re-save.

Reporting

Click the yellow button to download the result to an xls format.
Dashboard Overview

When you log into Envision, you will be greeted by the dashboard screen. There are several graphs available that provide critical object data in the Dashboard panel. You can navigate up or Down the Object Tree by using the Object Tree Icon or by utilizing the Object String next to it. A drop down menu will appear if you hover over the Object Labels.

There is also a new User Dashboard Tab. See User Dashboard.
Dashboard Item and Description

- **Navigation Panel**: The main panel used to navigate the Envision interface.
- **Child History Table**: A quick overview of the cycle performance of your main factory zones.
- **Offload Efficiency Table**: Lets you know how efficiently cycles are being completed.
- **OEE Chart**: A chart that quickly visualizes OEE data calculated automatically by Envision.
- **Cycle Status Graph**: Visualize how positively or negatively cycle time is trending.
- **Notes Panel**: Contains user created notes that are attached to specific machine processes. Can also be found in the notes section.
- **State Duration Graph**: Visualize how often shifts were in certain states.
- **Fault Table**: Visualizes what objects have most recently recorded a fault.
- **Hotspots Panel**: Visualizes which objects have accumulated the most faults in a predetermined time-frame.
Dashboard Item and Description

1. **Navigation Panel**: The main panel used to navigate the Envision interface.

![Dashboard Panel](image1)

2. **Child History Table**: A quick overview of the cycle performance of your main factory zones.

![Child History Table](image2)

3. **Offload Efficiency Table**: Lets you know how efficiently cycles are being completed.

![Offload Efficiency Table](image3)
4 **OEE Chart**: A chart that quickly visualizes OEE data calculated automatically by Envision.

5 **Cycle Status Graph**: Visualize how positively or negatively cycle time is trending.
6 Notes Panel: Contains user created notes that are attached to specific machine processes. Can also be found in the notes section.

![Lastest Notes](image)

7 State Duration Graph: Visualize how often shifts were in certain states.

![State Duration Graph](image)
8 **Fault Table**: Visualizes what objects have most recently recorded a fault.

![Fault Table Image]

9 **Hotspots Panel**: Visualizes which objects have accumulated the most faults in a predetermined time-frame.

![Hotspots Panel Image]
User Dashboards

In the Dashboard section is the User Dashboard Tab. Clicking on this tab or the Monitor Tab will open a new window that will slide in from the right, containing dashboard templates.

The window has a series of action buttons along the top of the window. In the window lies the previously created templates.

In the top of the window, lies buttons for Filter, Create New Dashboard, Import Dashboard, Refresh and Close Window.

Filter

The Filter button when selected, will show a drop-down window with a selection of Show All or My Dashboards. Selecting Show all will display all the created dashboards currently in Envision. Selecting My Dashboards, will only display the dashboards that were created by your logged in profile. It also has a Category sorting feature that will let you sort the Dashboard by Categories types:

- Maintenance
- Analytics
- Production
- System
- Other
Create New Dashboard

Selecting the **Create a New Dashboard** button, will open the New Dashboard Window as seen below. In this window, you will input a **Name** for the Dashboard, a brief **Description** of the dashboard if needed, a choice of **Category** (Maintenance, Analytics, Production, System, or Other) and a check box that will allow you to save it as Public or Private. Selecting Private will not allow you to edit the dashboard unless you are logged in as the creator of it.

After the New Dashboard Setup screen is completed, select the **Save** button, a new Dashboard Template will appear on the New Dashboard Selection window. All the data you inputted on the New Dashboard window, is now on the Dashboard Selection Template.
Import Dashboard

Selecting the **Import Dashboard** button will open an explorer search window. Use this, to find and select the file you would like to import. Clicking on the button will invoke an explorer window for you to locate the XML file that was exported earlier.

In this example the Live Test was exported and was placed in the Download folder of the CPU it was exported from.
Template Actions

In the Dashboard selection window, are separate Templates of different dashboards. They all have a series of action buttons to choose from. These buttons will allow you to Run, Edit, Delete, Copy, Subscribe, and Export the selected Template.

Run

The Run button, will open a new window with the selected Dashboard. This may take a few moments for the Dashboard to load. If the Dashboard loads, and there is no data for that time period, utilize the Day/Shift Filter to zero in on the days you would like to view.

Edit

The Edit button will open the select Dashboard very much like the run button does, but with an area to the left of the dashboard that contain the editing template. In this Editing Template, is a selection of icons that represent the settings and options to add, remove, edit, or change any part of the current template. Note: the editing can only be utilized if you are logged in as the creator of the template.

Delete

The Delete button is used to Delete the template from the Selection Panel. This can only delete the Public Template. The Private Templates cannot be Deleted unless you are logged in as the creator of it.

Copy

Use the Copy button to copy the template (Live Test). When the Monitor button is selected, it will show a duplicate template labeled as Copy of Live Test in the Template selection area.

Subscribe 0

Use this feature to Subscribe to the Selected Template.

Export

This feature will allow you to export this Template to the download folder, which then will be able to be imported to envision.

Default

This feature dictates which Dashboard will open initially. If the Icon is Green, then this is the dashboard that will open. If it is turned off, then it will reopen the last dashboard that was viewed.
Run

Clicking on the Run button on the dashboard that you selected. If the object is running on a current project, then an active screen will display. If not, select the Filter button on the far-right hand side next to the monitor. That will open the Day/Shift Filter, which is a range filter window that will allow you to select a start and end date.

From there, click and hold the start time slider and slide it to the Day/Shift you want to start your date set. Then click and hold the end time I move that to the Day/Shift you want to view. When everything is correctly selected, then click the Apply button.

Optional Filters

You can further filter your selection by clicking on the blue "Optional Filters" button. This button when selected will reveal a selection of four tables. Shift, Shift Crew, Status, and Classification.

In the upper right-hand corner above the display area, is an Export icon. This is it is used to export graph to either a PDF or an image. PDF’s are generally good to send as email. Images can be made to print and display.

When selecting the export to image option, another window will open. It will be an export to image in the name of the test template that you are using. From there, in this form window, input the title name of the template. Next, check or uncheck the show the title checkbox. This will show the time on the template. Next input the name of the title. Below that is the filter State, select None or Below. Next, choose which image format choose between PNG, Gif, or jpg. Next, you can set the resolution. The resolution is set a default of 96 DPI. In the event, you would like to display it on paper, before printing, it would be advised that you increase the DPI, so the printing and images, will be clearer and easier to read.

From here, check over your changes into the export to image window. If everything is satisfactory then click export. If not, you can cancel or click the reset button. The reset button will reset all the parameters and allow you to input them again.
Realtime (Current Shift)

After the selection of the Run button, when there is current activity in the shift, you can select the Realtime (Current Shift) button, to the left of the Apply button. Selecting this button will reveal an active window that updates every 10 seconds. This offers a real-time look at your object level selection.
Next to the Run button is the Edit button. The Edit button will reload the window with a Toolbar to the left of the graphing displaying area. From there you have a choice of a graphing menu of: Common and Filters.

Editing Toolbar Tab

The Editing Toolbar consist of various types of graphing tools. It uses common, maps, and filtering types of graphing tools. Clicking on any one of the icons will instantly add it to the display area. It will initially partition the graphing area equally. When you install a new graph, you can place it wherever you want in the display area. Simply click and hold on the placement tab at the top of the newly installed graph.
After the installation of any graph will require you to link it to the correct data source. Click on any of the graphs in the display area and a Setting Widget will reveal to the left of the selected graph. You will use this widget to Bind the data to the selected graph. It can also be used to edit or change the properties of the selected graph.

Use these toolbars to configure your selection.

**Binding**

Binding allows you to input the objects you want to view.

**Interactivity**

Interactivity gives you features, that enable interaction between various dashboard items.

**Options**

The options tab, allows you to edit the Common, Axis X, Axis Y, Legend, Coloring, and Color Scheme.

**Convert To**

The Convert To tab allow you to change from one graphical representation to another. Note you may have to reconfigure the data binding if necessary.

**Delete**

Use the Delete tab to remove the selected graphical representation from the display area.
Delete

The **Delete** button is used to Delete the template from the Selection Panel. Simply select the red Delete button and the Dashboard Report and the Template on the selection page will be removed.

**Note:** This can only delete the Public Template. The Private Templates cannot be Deleted unless you are logged in as the Admin or logged in as the creator of it.

Please ensure that this Dashboard report is not being utilized by anyone else before it is Deleted permanently.

Copy

Use the **Copy** button to copy the template (**Live Test**). When the Monitor button is selected, it will show a duplicate template labeled as **Copy of Live Test** in the Template selection area.

It is best practice to make a copy to edit or augment. By doing this, you will be able to have a perfect reference to base your model off and it can be used to revert your copy back to the original state.
Subscribe 0

Click on the blue Subscribe button to use this feature to Subscribe to the Dashboard Report you have selected. The Subscription emails contain direct links to the report. Simply configure the report by adding a Name for the report, range of dates, the navigated object to subscribe to, Other option, and an Email address with Message.

This will work in conjunction to the conditional notifications feature. It will allow the users to be notified by email or text message, when certain conditions are met. The Notifications can also be linked to a report via a subscription. When a notification is sent, it will invoke that subscription and send the attached dashboard or report to the recipient.

First, input a Name you would like to call the Report (there may be several subscriptions so, this would be ideal to identify between several similar subscriptions). Enter a Data Range (Last N Hours/Days, Current Shift, Last Shift, Today, Yesterday, Weeks, Months, etc.). Navigate to the object you would like to view. Select the optional data such as Status, Shift, and Shift Crew. Input the Recipient(s), Email Subject, and Email Message.

Set the time and day you would like to have the Subscription sent to you by utilizing the excel based selection chart. Select a cell and the Hour will appear. Click on the minute and set it to your desire. Once everything is set, click the Save button.

Optional and Email Settings

In the image below, shows the editing selection boxes of each of the Optional and Email Settings.

- **Range** – A predetermined range of time you would like to view.
- **Status** – Good, Watch, Warning, Missing, or Fault.
- **Shift** – The time that the shift takes place.
- **Shift Crew** – One of the multiple crews in a single shift.
- **Classifications** – The classification of the object.
- **Recipients** – The person or Person’s email addresses that you would like to send it to.
- **Email Subject** - The subject name of the email. Note there may be several related subscriptions, so this would be a way to distinguish between 2 or more similar subscriptions.
- **Email Message** – Personal message about the subscription.

After every parameter is set to your desire, click the Save button to initiate the subscription, or Close to close the window.
Export

This feature will allow you to export a Template to the download folder. Simply click on the Export button, and the XML file will download the file to Download folder on the computer. From there, it can be imported to another Envision program if needed.
User Dashboard Menu

Above the Dashboard Icons is an tab \text{Dashboard Menu} \text{Tab}. This tab consists of the save option and the following tabs: Data sources, titles, currency, parameters, and color scheme.

\textbf{Save}

The same option is used to save your work. Once it is saved it cannot be reverted. Ensure that your work is ready to be saved, before you select it.

\textbf{Data Sources}

When you select the data sources tab, it opens a data sources window to the right. It has two columns, the \textit{USED DATA SOURCES}, and the Dashboard items related to the Data Sources. The use data sources in this example consist of Cycles, cycle shifts, Hotspots, States, and Notes.

Depending on which data source you selected, the list will repopulate to the right. This is a list of common envision object names and functions that are associated with each data source, such as area name, asset name, Baseline, cycle count, etc.

To add an additional data source, click on the Add link on the top of the Used Data Sources column. This action will reveal the \textit{ADD DATA SOURCE} Window. In this window, it will display the Data Sources available as well as an option to create one by use of the \textit{Create Data Source} link on the top right hand side of the choices.
Create Data Source
Clicking on this link will open another window, a Dashboard Data Source Wizard window. There will be two options available, make a choice of either, Local SqlServer or a Default Connection. Select to proceed to the next window to: Create a Query or Select a Stored Procedure.

Filter Editor
When applying filtering to a specific dashboard item, per the current parameter value, use the Filter Editor.
In the Filter Editor, you can compare a field value with the following objects. Click on the Filter Link above the 2nd table in the Data Sources window. The Filter Editor will open. In this window, will be an and area with a And icon in it. Hover over the And icon and a green + sign will appear. From there, you can either click on the And, or click on the + sign.

Clicking on the And will reveal a choice of several items. And, Or, Not And, and Not Or. Selecting one of these will display it in place in the window. This is the start of your filter.

Now click on the + sign. Clicking on the + sign will open a drop down window that will offer 2 choices. Add group or Add condition.

Add group will add another And sign below and right of the top Filter. The icon will have a red X on the left, and a green + sign on the right. Clicking the red X will delete the added group.

Clicking on the Add Condition option will reveal a set of configurable strings. By default, it will be as follows: areaName Equals Enter a value.
Click on the areaName, and a dropdown table will reveal. It will contain all the possible parameters available for your selection. Choose the proper parameter and it will appear in place of the previous areaName.
Click on the Equals label, and it will reveal a drop-down table to choose the operators you would like to use. Click on your choice and it will appear in place of your previous operator.
In the Enter a Value, clicking on the box will open an editing box for you to input a value based upon your previous selections. Click on the drop-down tab, and it will offer you two options to choose from, Value and Property. Choosing Value will open an editing box just the same as if you clicked on the box as previously explained. Choosing the Property option will open a table so parameters similar to the areaName parameter as the previous one.

Creating a Calculated Field

The User Dashboard provides the capability to create calculated fields that allow you to apply complex expressions to data fields that are accessed from the dashboard’s data source. You can use these fields in data visualizations as regular data source fields.

Add Calculated Field.
Title
Clicking on the title tab will open the title window. From here, there are several edit boxes to configure the Title.

TEXT
The first edit box is the TEXT. Enter the name of the template. There's a checkbox which allows you to make it visible or not.

ALIGNMENT
Below the text portion is alignment. From there you select where do you want it left Justified or centered. Also, there is a check box labeled include Master Filter.

IMAGE
Below the Alignment set, is the image box. Click on this and it will open a window which will allow you to select an image to display on your template next to the Title.

PREVIEW
The Preview window will display what the Dashboard Title will appear.
Parameters

The Parameter tab displays the parameters used in the dashboard. It will allow you to Add, Remove, or Edit the parameters of the current dashboard.

Click on the Add Parameter link, and a Parameters window will open. This window contains a Parameter List, which lists all the current parameters and has an Add link to add additional parameters. Selecting the parameter on the Parameter List and to the left of the list, is the Name edit box, Description, 4 check boxes (visible, Allow Null, Allow Multis, and Select All Values), Type, Default Value, and Look-Up String.

Name
This Name box is used to name the parameter.

Description
Use this edit box to describe the Parameter. Below the edit box are checkoff boxes to add to the Description. They are Visible, Allow Null, Allow Multis, and Select All Values.

Type
They Type category allows you to choose from several options. You can choose by String, Date, Number (16, 32, 64 bit integers, floating points double-precision floating-point, and decimal), Boolean, and Guid.

Default Value
Input a default value.

Look-Up Strings
The lookup settings give you a choice of settings. No Look-Up, Static List, and Dynamic List.
Hotspots

- Navigation
- Hotspot Options
- Hotspot Views
- Count/Accumulation
- Pallet Breakdown
- Model Breakdown

Overview

The Hotspot module displays the list of motions that accumulate the variances over a period of time. It also shows the number of occurrences each day that contributed to the accumulated variances. ENVISION only uses non-faulted cycles for the hotspots calculation. This module shows the accumulated effects of minor variances in certain motions that can cause significant production loss (leakage) over time. For example, for a 60 second cycle time machine, a one second delay in one motion will cause approximately one part per hour production leakage.

Navigation

Use the Main Tree to navigate to the objects you want to view a hotspot report on.

Once you have chosen your object, **Click** on the **Hotspot** tab from the top menu.

The module will launch after selecting the **Hotspot** tab. Each colored box in the module represents the number of over cycle Occurrences that occurred for the object in a given hour on a given day **Occurrences View** shown below). The number in each cell represents the number of occurrences in that particular hour span.
Hotspot Options

Set Date Range

You can select the date range you would like for the hotspot module using the dropdown calendar located in the upper left corner.

Variance

Use the Variance Accumulation tab located in the right corner of the module for the variance view. In the Variance view, the module lets you see the amount of over cycle variance for each hour (in Minutes) of your object cycle.

Hour Detail

By Clicking on any of the individual cells in the hotspot module, you can access a more detailed breakdown of over cycle processes in that hour. The number 218 represents the Over cycle occurrences for that hour.

By selecting the Hour 218 on the figure above, this will display a detailed table revealing a comprehensive breakdown of processes that contributed to the accumulated over cycle time for that hour selected. Hovering over the bar will display the data for your selection.
Clicking on the object bar will display a table of object data that may be sorted by clicking a column header to the top line.

The View Cycle button will open a new browser window with the object data for that selected cycle object.
Hotspot Views

In the top right corner of the hotspot module are options for other table views you can access.

Timeline

The default view in the Hotspot module. A graph showing the total over cycle accumulation for each object.

Count/Accumulation

This tab shows the Variance Accumulation (in minutes) as well as the Overcycle Occurrences from a specific dates selected to view. This data can be exported to excel. Click the yellow button to and it will start a download to an excel file. A tab will open on the bottom left side of the browser. Open to view, plot, and send the excel data.

Use the Filter button to filter by Shift, Shift Label, Classification, Bottleneck, and CycleTime Overcycle. See Hotspots Filtering.

Use the Export to Excel button to download a copy to your download folder.
Pallet Breakdown
This reveals a graph showing which AGVs (carriers) contributed to your over cycle accumulation.

Model Breakdown
This reveals a graph of Occurrences and Variance based upon Model Type.
Hotspots now has a new feature that will allow you to plot data on a Pivot Table. While in Hotspots, click on the Pivot tab to the right of the Model Breakdown Tab. **Clicking** on this will reopen the Hotspots window to a Pivot style table.

From here, you can click on the “Show Field Chooser” Icon on the upper right hand side of the pivot table. This will open the Field Chooser setup window.

Choose from the All Fields area by checking the box, the dragging it over to the Row, Column, Filter, and Data fields. When this action is commencing, the Pivot table will populate and display your choices.

After your fields are set, you can click the x (close window) at the upper right hand corner of the Field Chooser window.
### Hotspot

#### Field Chooser

**All Fields**
- Area
- Asset
- Classification
- Date
- Day Day (Sum)
- Day Hour (Sum)
- Day Of Week
- Delta
- Group

**Row Fields**
- Group

**Column Fields**
- Asset
- Shift (Sum)
- Station

**Filter Fields**
- Delta

**Data Fields**
- Delta

---

### Hotspot

#### Hotspots

**Date Range:** Jan 30, 2017 - Feb 06, 2017

<table>
<thead>
<tr>
<th>Delta</th>
<th>Asset ▲</th>
<th>Shift (Sum) ▲</th>
<th>Station ▲</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIN CLAMPS CLOSE</td>
<td>0.00</td>
<td>0.00</td>
<td>276.62</td>
<td>55.77</td>
</tr>
<tr>
<td>ROBOT LOAD</td>
<td>46.58</td>
<td>6400.32</td>
<td>11118.31</td>
<td></td>
</tr>
<tr>
<td>TRANSFER IN</td>
<td>0.00</td>
<td>1299.96</td>
<td>961.47</td>
<td></td>
</tr>
<tr>
<td>TRANSFER OUT</td>
<td>0.00</td>
<td>961.78</td>
<td>772.57</td>
<td></td>
</tr>
</tbody>
</table>

---

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Hotspots Filtering

In the HotSpots section, there is a new filtering option available to use. Click on the blue Filter button in the upper right side of the Hotspots table. Clicking on this button will open the Filter page. From there, you can sort and filter by checking off the check boxes for “Show only bottlenecks” and “Show only where CYCLETIME is over” choices. You can also sort by Shifts, Shift Labels, and Classifications. When your selections are complete, click the Apply button to update and engage the filtering.
Notes

Overview

The Envision notes panel allows users to input descriptions about any given cycle they wish. This is a practical and convenient method of communicating issues as they happen across an assembly plant. Notes that have inputted at any time are persistently available to be viewed by authorized users.

In the Notes section of enVision, the user will now have the option to Delete or Edit their notes if they are an Admin or the author of the note.

Select the Edit button to re-open the Update Note window. From here, make any correction in Category and in the Note section. When the Note is finished, click the Save button to complete the editing.

Selecting the Delete button will open a warning box and give you a choice to Confirm to remove or not remove the Note permanently.
2/4/2017 8:54:38 AM  bcoffee

Test-Default
Simulation/Test Area/Test Line 2 Copy/STA 1/S01 Fixture
Cycle Date: 2/4/2017 8:52:00 AM, Model: Model Test 1, Pallet: 5, Variance: 20:01
Category: 237-b

2/3/2017 1:52:48 PM  bcoffee

Test-Default
Simulation/Test Area/Test Line 2 Copy/STA 1/S01 Fixture
Cycle Date: 2/3/2017 9:52:00 AM, Model: Model Test 1, Pallet: 5, Variance: 40:14
Scheduling

The scheduling menu allows you to setup and configure a schedule for multiple shifts. It also will allow you to schedule Non-Production Events, such as Preventative Maintenance, Breaks, and other reasons for a scheduled shutdown.

Navigating

On the opening screen, select the calendar icon in the upper left corner of the Envision browser.

- Navigating
- Scheduling Configuration
- Non-Production Event
- Extend Shifts
- Deleting Shifts

Scheduling Configuration

Start by selecting a day on the calendar.

By selecting a date on the calendar, the area to the right of the calendar will now reveal the Create Shift Menu. From here you can enter the name of the shift, which shift (if multiple shifts are present), Start time, and End time.

Enter the name of the Shift (Red). Some shifts have 2 or more other shifts so you can enter which shift it is by labeling them Crew A and B or 1, 2, and 3. Enter the Start Time for the shift by Clicking inside the edit box. This will open a time clock menu. Click on the Hour to set the Hour, then Click on the minutes. Select A.M. or P.M., then Click Save when you are done.
We have selected a Start time of 3:00 P.M. and an End time of 11:00 P.M.
Non-Production Event

During a shift, it may be necessary to have a scheduled shutdown for Preventative Maintenance, Breaks, or a Shift change. For that, we have an area to input a Non-Production Event.

To set this up, start by **Clicking** in the box under the NPE. Input the Name/Reason in that Edit box. **Click** in the Start time box to open a Time Clock Menu. Use this to input the Start Time for the event. Now input the End time. Verify after inputting the times, that the correct time to the right of the Start and End time is correct at intended. If not, you can simply select the delete button or make a correction to either. Select the Planned Schedule to make this repeat for all the shift’s select. Set the Cycle Speed Factor if it isn’t already set to specification. Now select the Repeat Shift checkbox if you would like to add duplicate shifts throughout the week.

After checking the Repeat shift box, a Repeat Until edit box and a weekday selection menu will appear. Use the Calendar to select the date that you to repeat the weekly schedule. This will repeat until the date you select. Now select the days that you would like to repeat on the Weekday Selection menu.

Check over the information you have inputted in this configuration menu. If everything is correct, select **Save** to continue.
The page will update and look similar to this. The calendar will show the shifts, and the area next to the calendar will now have an Edit Red shift window. Also, at the bottom, you now have an option to Extend to future shifts.

**Extend Shifts**

After selecting **Save**, more options will reveal. The **Apply to Future shift**'s check box will appear. Check off the **Extend** button to open an **Extend until** edit box. Input the data you would like to extend the shifts until. Select the days, then **Click Save**.
Deleting Shifts

The Scheduling module also allows you to delete a shift or All (Future) shifts. To Delete a shift, **Click** on the shift name on the calendar, then select **Delete Shift**. You can **Delete All Shifts (Future)** by **Clicking** on a shift on the calendar, then **Click** this button. All future shifts will be deleted.
Production Monitor

Overview

The Production Monitor is a browser that can provide a quick live report on plant productions. The Production Monitor can display data for the entire plant, including overcycle time in accumulated events, production data for each zone hour by hour or by a selected shift.

- Location
- Select Historical Shift
- Change Object
- Alternate Navigational options
- Hour View and Shift View
- Rollup Hotspots
- Filters
- Production Lost
- Buttons and Descriptions
- Reporting
- Screen Print
- Over Cycle (Last 50000) and Over Cycle (Selected Shift)
- Top Assets by Group leader, Station, and Top 3
- Top 3 Pallets (AVG)

Location

The Production Monitor button is located in the upper right hand corner of the Envision Browser window in highlight.

Once selected, it will open a new window with the Production monitor. In this new window, there will be an Objects window for you to navigate to the object you desire.
Click through the Objects string to get to the object desired. Once you have revealed the level desired, then Click on the Save button. This will open a new Browser. This Production Browser can be opened in levels from AREA, LINE, STATION, to ASSET.

A browser window will open to the location selected. The Production Monitor will default to the current day or shift. If there is not any data for current shift, it may be necessary to look back into the past for data. This module works with current data and historical data.

Select Historical Shift
This opens and displays a Previous Shifts window that will allow you to choose from the Current Shift all the way to the last few months. To view a specified date, scroll down to the date, and shift desired and Click on it. This will re-open the window (at the same level) of the day and shift selected.

Once the browser is open to the location desired, an alternate way to navigate to a higher or lower object can be done either by selecting the Change Object Icon, Object Labels, or the Object String Tab.
Change Object

This displays a window to navigate up or down an Object Tree. **Click** on the Object in the white part of the window:

Sta 1
Sta 2
Sta 3

to navigate down the object tree.

**OR**

**Click** in an Object in the black portion of the Object window;

Simulation > Test Area > Test Line 2 Copy > to navigate Upward to an Object desired. **Click** the **Save** button to open the objects below the selected object.

Alternate Navigational options

There are additional ways to navigate to a higher level or drill down to a lower level object, by using the Object Title Label, or the Object String on the top left hand side of the Production Monitor Browser.

Clicking on the Object Title Label 1 of the upper graph will open a new Production Monitor window with a new graph of the objects below the selection.

Clicking on the Object String 2 at the top of the browser. Doing this will open a new browser with a higher level Object.

Navigating by Object Title

The titles on the upper portion of the Production monitors are active links to the next level below the current object being viewed.
Clicking on the S01 Fixture will reopen the window that selected level. You can drill down to the Asset level.
Navigating to a Higher Level

To navigate to a level higher than your current location, you can utilize the Object String (address) on the top of the Production Monitor browser.

Clicking on the Test Line 2 Copy will reopen the PM browser to that level as seen below.
Hour View and Shift View

After selecting location from the Object Tree a browser will open. These examples show the Hour View and Shift view side by side. In the lower part of the browser is the lower graph in a Rollup Hotspots View ON and OFF.

The Shift View shows the bars separated by it’s classifications and color coding. They are yellow for Starved, orange for Overcycle, and blue for Blocked.

In the Hour view, the bars are separated by the 13 hours. The classification are used in stacked style bars.

Hovering over the bars with the cursor will reveal the details of the cycles.

Rollup Hotspots

The Rollup Hotspots button will take the top 10 variances, will roll the group object displayed into the Assets in a display.
Filters

The Filters tab allows the user to select and sort by Classification.

The Filter tab is located on the upper right hand corner of the Production Monitor browser.

By selecting the filter button in the Production Monitor browser, a filter options window will open. From there, you can select the classifications you would view. You can also select to view Bottleneck, Disable PM visibility, show Notes Icon, Show Detail Icon, and adjust the number of Hotspots you would like to view (1 – 10).
Show/Hide Option

When using the Production Monitor, it is possible to remove objects from view. Click on the Show/Hide button and a window will appear with a list of the objects with checkboxes next to them.

On the initial use of this feature, the boxes will all be unchecked. Check or select the objects you want to display on the Production monitor. Now select Apply. The Production monitor will reload and reveal the updated browser, with only the selected objects.

Click on it again and it will show your selection. To re-add the deselected objects, simply check the unchecked boxes, click Apply, and the browser will reload with all the objects in display.
Production Lost

When the Production Lost button is selected, the browser window will open to a similar window as previous, however, the bottom graph will change the scale and will have the total Units lost presented. In the upper graph, it looks similar Minutes (mode/default), but the Minutes and Units will be reversed.
Reference Sheet

Buttons and Descriptions

**Hour**  
Displays Object data, Hour by Hour.

**Shift**  
Displays Objects data in a 10-hour shift.

**Minutes**  
Displays Object data in Minutes and Units in the upper graph in the browser.
Displays the number of Units lost. The Minutes data is displayed as well under the Units.

**Production Lost**  
Displays the number of Units lost. The Minutes data is displayed as well under the Units.

**Trend**  
Trends button displays a trend line on the upper graph in the Hour by Hour Mode only.

**Rollup Hotspots**  
This button will group all the objects and display them in their own groups by station, instead of showing the top 10 accumulations.

**Info**  
This Icon displays a window with a Table of Recorded Overcycles.

**Note**  
This Icon displays a window to view Notes that were taken on the Object cycle. The number indicates how many notes have been taken on that object.

**Starved**  
The Object is waiting for the next part to start working.

**Overcycle**  
A cycle that is outside the tolerance range of the cycle time for that object.

**Blocked**  
An Object that is in a blocked state. The Object completes its work and is waiting for downstream Objects to finish so the finished part can move out of the Object.
Reference Sheet 2

The button opens a table of the recorded overcycles.

Select Historical Shift
This opens a window of the last 30 days. To view a specified date, click on a date, with a choice of Day or Night shift and the browser will refresh with the date selected.

Selecting Hour shows the data based upon an 10 hour shift in the upper graph and show the Variance Accumulations in Minutes (occ) in the lower graph.

Selecting Shift will show the data based upon the whole shift in the upper graph. The lower graph will be the same as Hour mode.

This is the Production Lost graph in the upper area of the browser. It is in the Hour mode. This shows the Production Lost over a 10 hour time period by the Hour.

This is the Production Lost graph of the upper area in the browser. It is in the Shift mode. This shows the production Lost over a whole shift (10 hours).
Reporting – Production Monitor

This displays a window with a selection of Report to view by Preview, Excel, or PDF. Click on the selection under reports, then choose the option to view.

When the Reporting Button is selected, a window will open with a menu in the upper left hand corner. There are 7 choices of ways to view object data.

Choose from the Menu which object data you
Screen Print

Select Screen print will copy the current browser window and open it in a PNG format.

At the bottom left hand corner, a tab will open to view the .png file.

Select Open, and it will open a window to view the Screen Print. The background will be a lighter shade for printing and displaying.

Over Cycle (Last 50000) and Over Cycle (Selected Shift)

Both Over Cycle (Last 50000) and Over Cycle (Selected Shift) work the same way to download to an Excel file for viewing.

Select the Excel button will download the data to an excel spreadsheet.
Top Assets by Groupleader, Station, and Top 3

All 3 have the same 3 view options to choose from. Selecting preview will open a preview window within the reporting window. Choosing Excel or PDF will download and open the object data to the chosen format.

Top 3 Pallets (AVG)

This opens a window with a drop down to select the date. It also has the choices of Preview, Excel, and PDF. Preview is shown in this example.
Reporting

- Opening the Module
- Reports
- Dashboard
- Dashboard Reports
- Run
- Subscribe
- Configuring Subscription
- Setting up the Subscriptions

Overview

Reporting and Dashboard modules are features of Envision that allows a user to design, personalize, setup, and configure customized reports. You can also have it send reports at specific times and choices of reports.

Opening the Module

Open the Envision browser. In the upper menu, select the Reporting Tab. This will open the Starting page menu. The browser will reopen at the starting screen for the Envision Reporting browser. In the main window, there is a menu that consists of a list of previously designed report templates, that can be sorted or filtered based upon category.

The Reports page has a list of previously configured reports ready to be utilized. You can create and design a new report to suit your needs. To use an already configured report, select the green button (green) and it will open the setup window for the configured report selected. To open the Edit report window, select the (yellow) Edit Report button to open the reports editing window. To edit the Report Name, click on the edit name button . To delete a report template, select the red Delete button (red), and this will delete the report template selected. You can make a download a report by selecting the button, and this will create another copy to use. To subscribe to a report, select the Subscribe button (blue).
Reports

- Creating a New Report
- Report Editor
- Configuration Menu Panel
- Properties
- Formatting Rules
- Field List
- Report Explorer

Creating a New Report

Click on the + Create New tab to open the Create New Report information window. In this window, you can input the necessary information needed to create a report template. Input the Name of the report, then the Description which appears under the name of the report on the Report List Window. Select the appropriate category for the report. Choose the orientation of the report, between Portrait or Landscape (default is Landscape).

After selecting Save on the Create New Report information window, Report Editor Board window will appear. From here, you can setup, configure, and populate the report with the necessary information that you desire.
Report Editor Board

The Upper menu consist of typical commands common to a windows program. On the left side is the types of objects to install on the Report Editor board. Once an object is placed on the Report Editor board, they can be configured by using the menu on the right-hand side of the window. In default, the configuration menu pane is open. If not, click on the arrow in the top left hand corner to reveal the configuration menu pane.

This is a table of all the objects and functions available based upon what you select to be displayed in the Report Editor Board.
Configuration Menu Panel

Overview

The Configuration Menu Panel is separated into three parts needed to setup and configure the parameters installed in the Editor/Designer window. They are Properties, Field List, and Report Explorer.

Properties

The Properties are, Actions, Styles, Appearance, Behavior, Data, Design, Navigation, Layout and Page Settings. Each of these can open to reveal many different options depending upon what object parameter is chosen. In other words, there are different options for different types of parameters. Not all parameters use all the same Priority Parameters.

ACTIONS

Select an Object on the Editor Board (example below: [assetname]). Once the object is selected, the Properties Menu will update to include the data, setup and information on the selected object. On the Properties menu you can change, configure, and view the setup information for that item.

Areas of the Report Editor Board can be collapse to hide or temporarily remove from view until restored. Simply double Click on the Header of the area you would like to collapse. Double Click again to restore the collapsed are back to open.

All the data pertaining to the object selected will be in the Properties Menu area. The ACTION Menu has several configuration and data that can be inputted based upon needs. To the right of every parameter is a small button. When this button is highlighted (light or darkened), that shows that there is data for this parameter and is in use. You can Click it and it will reveal a dialog box that will offer you a choice to Reset the parameter. If the button is not highlighted, you may input data to configure the object selected.
STYLES
Styles controls the formatting of the selected object. To start formatting, double **Click** the **Styles** drop down. There it will offer you a few choices. You can Create a new style by selecting the **Create New Style** tab or select the **xrControlStyle1**. If you selected the Create New Style, then it will initially name it **xrControStyle2**. Either way, they both can be renamed easily as needed.

Now that it is selected, you can go through each item and customize it to your needs. In this example, we selected **xrControlStyle1**. This will read in the **EVEN STYLE** box. To do this, **Click** on the **EVEN (ODD or STYLE) STYLE** drop down to open the **STYLE** Configuration menu.

In the **Name** box you can personalize the object by naming it, otherwise it will default to the system name **xrControlStyle1**.

**Click** on the **FONT** drop down to reveal the editing menu for **Font Name**, **Size** and **Unit**. It also has a tab for formatting using **Bold**, **Italic**, **Underline** and **Strikethrough**.

**PADDING** controls how much space you would have around the object selected. **Click** on the drop down to reveal the setting for the objects border.

**Color Design** of the object is controlled by the next group of parameters. You can choose the colors of the Background, Foreground, and the border. You can also choose the style (line, slash, dotted) of border you need, with the width at your control.

All these configuration can be done for the **ODD STYLE** and **STYLES**. Other types of objects will have similar configuration and different ones.
Appearance Configuration Tab
Appearance controls the formatting of the selected object. To start formatting, double Click the Appearance drop down. There it will offer you a few choices to add to the appearance of the object selected. The choices are Background Color, Border Color, Border Dash Style, Border Width, Foreground Color, and Text Alignment. The APPEARANCE tab also contains Sub Menu Tabs for FONT, PADDING, and FORMATTING RULES.

Once an object is selected, you can go through each Tab in the Appearance Menu and customize the appearance to your needs.

Background and Foreground Color
The first tab is the Background Color. Click on the drop down, to open a color configuration window. In this window. First select the Vertical Color selector to choose the color you would like to create. Now, move the Color Target Reticle to the Hue you desire. Next, use the Alpha slider to set the opacity of the color of the object selected.

You can also manually input the color coding the R, G, and B if you have a specific color to match. Alpha can be set this way as well.

Once the color is correctly configured, you can Click OK to set the Background color to the object selected.

Border Color, Border Dash Style and Border Width
The Border Color Tab works the same as the Background Tab above it. Simply configure the color you would like the border to be.

The Border Dash Style is used by Clicking on the drop down to reveal the choices of several types of borders to choose from.

The Border Width is set by either Clicking up or down on the Border Width Tab. Click up to increase the width or down to decrease the width.
 FONT

Click on the FONT drop down to reveal the editing menu for Font Name, Size and Unit. It also has a tab for formatting using Bold, Italic, Underline and Strikethrough.

This feature controls how much space you would have around the object selected. Click on the drop down to reveal the setting for the objects border.

FORMATTING RULES

Formatting rules are used in conjunction with an object to change the output data of the object selected to increase or decrease the detail of the output data. You can type the expression manually or select functions, operators and operands using editor controls. Note that the Expression Editor supports numerous standard functions, allowing you to easily perform different string, date-time, logical, aggregate, and math operations over data.
Field List

The Field List can be setup with **DataSources** and **Parameters**. Each of these can open to reveal many different options depending upon what object parameter is chosen. Simply **Click**, hold, and drag the object over to the Editor and drop. **Click** on the object and go to **Properties** to configure.

---

**Add DataSource**

There are several sections under the **Add DataSource Tab.** They are **Cycles (Hourly, Shift, Week)**, **ShiftNoPallet, and WeekNoPallet**, **Hotspots, States, Notes, OEE, and Raw Cycles**. Click on the icon to reveal the objects within. Once revealed, the objects added onto the Report Editor Board.

---

**Parameters**

In this example, under the Parameter label are **NumberDays** and **Baseline**. These are objects that can be dragged and dropped onto the Report Editor Board.

You can add more parameters by selecting the + sign next to it. Click, configure and then you can add them to the report.

In these screenshot example, we selected **assetname** under the cycle label. **Click** and hold, then drag it over to the appropriate place on the Reporting Editor Board.
Click on **assetname** under Cycles and drag to the Reporting Editor Board and Drop.

Click on **NumberDays** under Parameters and drag to the Reporting Editor Board and Drop.
Report Explorer

The Report Explorer is a tool that can allow you to view the data, character and information of the objects on the screen.

The Editing Board is separated into several different areas representing an area of a structured document report. From top to bottom from a default view, it starts with the Top Margin (1), Report Header (1), Detail (1), Report Footer (1), and Bottom Margin (1). Some of these can be duplicated and added to the table for additional content if needed. For example, if you wanted a second Detail area, you can add it by Clicking on the Detail (1) area of the Editor board, then go over to the Report Explorer on the right menu and Click on Detail (1). When you Click on it, a pencil icon will appear. Click on the pencil Icon and this will change the Report Explorer, to the Properties Menu. Under the Actions Tab, hover over the icons on the upper part of the menu until you reach the Detail Report Band. This will install another Detail Band below Detail (1) band. The same can be done for the other areas on the Report Editor Board.
While in the Report Explorer, you can view the data, character setup and status of the objects on the Editing board. Simply **Click** on an object on the screen and right side menu will update to the object you've select. When an object is selected, the Report section if closed, will open and display the section where the object is located and the actual objects below it.

In the image below, this shows the objects and setup of the Report Editing Board. What you click on the screen will be **highlighted** on the Report Explorer menu to the right.
Dashboard Reports

Opening Dashboard Reports
Open the Dashboard Reports by Clicking on the green Run button. Once selected, it will reveal the Dashboard Reports Setup screen.

Run
Selecting the Run button will open a Report Parameters window. This window configures and selects the data for the report. In this window, you have the options to set the date range, select an object from an object tree, and filter the report data by Status, Shift, Shift Crew and Classification.

Click on the edit box of the Select Date Range, and a 2-month calendar will open. Choose the start date by Clicking on it, then Click again on the end date. This will highlight the date range you select. On the bottom of the 2-month menu, are some shortcuts that can be used as well.

Once the date ranges are set, you can now navigate to the object of your desire, by using the Object Tree located below the SelectDate Range menu. Click on the + sign to reveal the object below the current selection. Once you reach the level intended, Click on the Title (label) desired.

After it has been selected, you can also filter and/or sort the results of your report by utilizing the selection menus on the right-hand side of the windows. You can sort by Status, Shift, Shift Crew, and Classification. These are optional. Click the Save button and the report window will launch and display the data based upon the report selected (or based upon how the report was setup).

After Clicking the Save button, the Dashboard will update the data to the template chosen and display in a browser.
<table>
<thead>
<tr>
<th>asset Name</th>
<th>cycle Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>S01 Fixture</td>
<td>1</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>1</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>2</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>1</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>8</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>10</td>
</tr>
<tr>
<td>S01 Fixture</td>
<td>1</td>
</tr>
</tbody>
</table>
The Subscribe button opens a window to setup and configures a way to send reports via email automatically. Simply fill out all the fields and select the time you would like to receive the report. Once set, it will send a report of the time that was selected. The report you receive is for the time you specified.

Configuring Subscription

Select the drop-down menu in the Range dialog box. It will reveal a range of choices. The choices with the letter “N”, when chosen, will open a dialog box under that will allow you to enter a number that represents the “N”. This allows you to specify an exact amount as opposed to Hour, Day, Week, or Month. In the example, 9 is selected, so the “Last N Days” will see it as the “Last 9 Days”.

N=The Number Entered in the Range* edit box (Enter number of days)
Next, below the Range field, navigate the **Object Tree** to go down to the object desired. You can also use the filters to the right of the Tree to sort and/or filter the object selection.

**Status** - Select the status’s that you would like to view.

**Shift** – Select the shift you would like to view.

**Shift Crew** – Choose a crew if this field is populated by the users.

**Classification** – Choose which classification to view.

**Recipients** – Enter an email address of the Recipients that you want to send the Dashboard report to.

**Email Subject** – Enter a Subject to appear in the subject line of an Email.

**Email Message** – Enter a message you would like to send as in email along with the report.

---

**Setting up the Subscriptions**

Select the day and hour when you would like to receive the report. **Double-Click** on the cell and it will reveal a timestamp highlighted in green. The time stamps are hourly but can be edited to make and send a report at a specific time. After selecting a time, enter the specific minutes you would like to select. When finished, check over all fields, then select the **Save** button. From this example, the recipient of this subscription will receive reports on Monday at 5:00 a.m., Tuesday at 6:00 a.m., and Wednesday at 7:15 a.m.
Conditional Notifications

At the Asset level, under the notifications icon, you can open the Conditional Notification window. From this window, you can have Notifications sent to you via Text and Email.

**NOTE:** The user will need to have the Analyst role to create and maintain Conditional notifications.

Click on the Notification Icon to open the Conditional notifications window.

**Range**

Select the Range you would like to view from Hour, Shift, Day, 7 Days, and 30 days. Each range is a selection of how long the notification duration will be.

The Hour selection will make the notification loop duration last for an hour before recycling. The Shift will be a 10-hour duration. Day will be a 24-hour duration, and so on.

**Condition**

Now select the Condition. You have a choice between And or Or. When using AND, all the selected conditions need to be true in order for it to register as Notification. Using OR, will allow it to send a notification if any of the selected conditions have occurred.

Check off the Measures that needs to be monitored. In each measure, there is an Accumulated Duration and Occurrences. Input a value you would like to be monitored.
Email
Input the email address of the recipient of the notification. The recipient will receive an email every time the conditions trigger the notification.

Text Message
Input the phone number of the recipient of the notifications. The recipient will receive a text message every time the conditions trigger the notifications.

However, there are a few limitations for using the text messaging feature.

There is a **25 text** message limit per day on one notification. Once it reaches 25 notifications, it will no longer send any more until the next day. This is controlled by the administrator. It can be increased if need be. The emails, however will keep being sent. Note: in the text message, there is an option to text STOP to halt the sending of the notifications via texting. This feature can be used once then restored. If it is used a second time, then it will not send any more until the next day. You can go back and edit the Conditional Notification to have it restart if needed.

Link to Subscriptions
These notifications can be linked to a subscription. Simply click on the up tab and the subscriptions links will appear. Select the subscription you would like link the Notification to.

**NOTE:** Users need to have the Analyst role to create and maintain Conditional notifications.
**System Health Monitor**

The Envision browser now has a System Health Monitor. It is located in the upper right-hand corner on the Top Navigation Menu. It is utilized by simply clicking on it. It will open the System Health window. This may take a moment to load. When it finishes loading, it will display a section for EAS (Envision Application Server) and an EDC (Envision Data Collector).

### EAS Monitor

In the EAS section, it will have multiple displays. From left to right, it will display the EAS CPU Usage, EAS Memory Usage, and EAS Disk Space. The EAS Disk space may have several drives present, depending upon the demand of the system used.

![EAS System Health Monitor](image)

### EDC Monitor

The EDC will have several multi displays. Each display consists of a CPU, Memory, and Drive Space. Each display will have a highlight bar above it displaying the net address, and the Last Contact Date and Time.

![EDC System Health Monitor](image)
Product Support

Standard Support

Every licensed Envision user is entitled to: 60 days of free email based product support, support@beet.com
Unlimited access to the on-line support materials available at Beet Analytics Technology support website http://support.beet.com
Critical bug fix updates for the version of software purchased.

Service Maintenance Level Support

Submitting Suggestions and Reporting Issues

Every licensed user who holds an active service maintenance contract for Envision is entitled to: Unlimited email based support for the duration of the subscription license support@beet.com

Unlimited access to the on-line support materials available at Beet Analytics Technology support website http://support.beet.com
Critical bug fix updates for the version of software purchased

Product enhancement updates for the duration of the service maintenance contract

If you wish to make a suggestion or report an issue you have discovered using Envision, you can do so using our support website http://support.beet.com. Alternatively, you can email Beet Analytics Technology Support at support@beet.com

The amount of information you can provide us with about the nature of a problem you are having will directly affect our ability to resolve it. The more information you can provide about your environment, the steps to reproduce and any other relevant information the better – please be verbose!
Trouble Shooting

See the Product Support section for available content at Beet Analytics Technology support website: http://support.beet.com

For more information or questions, go to the Envision Customer Knowledge Base website:
https://docs.beet.com/display/EKB/Envision+Customer+Knowledge+Base

See Troubleshooting articles on the Envision Customer Knowledge Base website:
https://docs.beet.com/display/EKB/Troubleshooting+articles

Check your systems health at a glance:

**System Health Monitor**
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8. Miscellaneous

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8.3 Force majeure. Neither Party hereto shall be liable for any default in the performance of its obligations under this EULA resulting from (i) a case of force majeure as defined by the law governing this EULA and the courts in such jurisdiction and (ii) the following causes: strikes (whether previously announced), war (declared or not), riots, governmental action, acts of terrorism, acts of God (fire, flood, earthquake, etc.).
8.4 Severability. If any part of this EULA is found to be invalid, illegal or unenforceable in any respect, the remaining provisions shall nevertheless be binding with the same effect as if the invalid, illegal or unenforceable part was originally deleted.

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8.11 Survival. The following sections of these General Terms shall survive termination thereof: "License Limitations", "Intellectual Property", "Warranties, Limitations and Disclaimers", "Limitation of Liability", "Term and Termination", "Miscellaneous", "Glossary".

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8.13 Counterparts. This EULA may be executed simultaneously in two (2) or more counterparts, each of which will be considered an original, but all of which together will constitute one and the same instrument.

9. Glossary

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**Glossary**

**EAS**
Envision Application Server

**EDC**
Envision Data Collector

**OEE**
Overall Equipment Efficiency

**VPS**
Virtual Private Server

**xls**
Excel spreadsheet
Index

2

2-month menu ........................................ 143

A

ACTIONS ................................................. 132
APPEARANCE ........................................... 135
Area................................................................... 15
assetname.................................................. 138
Assets......................................................... 15
Auto Learn .................................................. 26
AVG .................................................................. 128

B

Background Color ........................................... 135
Baseline ........................................................ 23
Baseline Editor ............................................. 26
BI Button...................................................... 128
Border Color .................................................. 135
Border Dash Style .......................................... 135
Border Width ................................................... 135
Browser........................................................ 19

C

Calendar.......................................................... 143
Change Object ................................................ 112
Classification ............................................... 147
Color Code ..................................................... 44
Color Design.................................................. 133
Color Target Reticle ....................................... 135
Conditional Notifications .................................. 148
Configuration menu pane................................... 131
Configuration Menu Panel ................................. 132
Configuring Subscription .................................. 146
Copy button ................................................... 129
Count/Accumulation ........................................ 93
Create New Report .......................................... 130
Creating a New Report ..................................... 130
Custom Range view ......................................... 52
Customer Requirements .................................... 13
Cycle Browser ............................................... 19
Cycle Date Options .......................................... 50
Cycle History ................................................... 43
Cycle History Day View ...................................... 54
Cycle History Higher Level View ......................... 55
Cycle History Overview ..................................... 43
Cycle History View types .................................... 53
Cycle Toggle Feature ......................................... 38
Cycle View Evaluation Module .......................... 29

D

Dashboard ...................................................... 143, 144
Dashboard Item and Description ......................... 62
Dashboard Overview ........................................ 59
Dashboard Reports ........................................... 143
Day View ....................................................... 55
Delete button ................................................ 129
Deleting a Collection ......................................... 38
Deleting a Cycle ............................................... 37
Deleting Shifts ................................................ 108
Distribution .................................................... 25

E

EAS Monitor ................................................... 150
EDC Monitor .................................................. 151
Edit Report window ........................................... 129
Editor Board .................................................. 130
ENVISION ..................................................... 10
Envision Pilot Checklist ...................................... 13
EVEN STYLE ................................................ 133
Extend Shifts ................................................... 107

F

Field List ....................................................... 137
Filters .......................................................... 44
Filters - Production Monitor ............................... 118
FONT ......................................................... 136
Formatting Rules ............................................. 137

G

Glossary ........................................................ 166
Groups .......................................................... 15

H

Heartbeat View ............................................... 22
History Filter Options ....................................... 46
Hotspot module ............................................... 89
Hotspot Options .............................................. 90
Hotspot report ............................................... 89
Hotspot Views ............................................... 92
Hotspots Filtering ........................................... 98
Hour Detail ..................................................... 90
Hour View .................................................... 54, 116
How to navigate with ENVISION ......................... 16
Index ............................................. 168
Installation ...................................... 13
Installation Introduction ......................... 13

License and Copyright ............................. 155

Main Tree ........................................ 15
Main Tree Navigation ............................... 17
Main Tree Object and Description ............... 15

Navigation ......................................... 15
Non-Production Event ............................. 104
Notes ............................................. 41, 100
Notes Overview .................................. 100
Number Entered .................................. 146

Object Properties ................................. 24
Object Tree ....................................... 143, 146
Occurrences View ................................. 89
ODD STYLE ...................................... 134
Opening Notes .................................... 41
Over Cycle (Last 50000) ......................... 126
Over Cycle (Selected Shift) ....................... 126

Pallet Breakdown ................................ 93
Parameters ....................................... 138
Parameters Field List ............................. 139
Parameters Window ............................... 57
Pivot – Hotspots ................................. 95
Plant Navigation .................................. 15
PM Buttons and Descriptions ................... 122
Product Support .................................. 153
Production Lost .................................. 120
Properties Menu .................................. 132

R
R, G, and B ....................................... 135

Realtime (Current Shift) ......................... 73
Recipients ..................................... 147
Report Explorer ................................. 140
Reporting ........................................ 125
Reporting Issues ................................. 153
Reports page ................................... 129
Run ............................................. 143
Run button ...................................... 129

Scheduling ...................................... 102
Scheduling Configuration ......................... 102
Screen Print ..................................... 126
Select Date Range ............................... 143
Select Historical Shift ....................... 111
Select Date Range ............................... 143
Sequence view ................................... 22
Service Maintenance Level Support ........ 153
Set Date Range .................................. 90
Setting up the Subscriptions ................. 147
Shift .............................................. 147
Shift Crew ...................................... 147
Shift View ...................................... 116
Show/Hide Option (PM) ......................... 119
Software Application ......................... 14
SqlDataSource .................................. 138
Standard Support ............................... 153
State Duration .................................. 56
Status ............................................ 147
Status percentage ............................... 55
Status, Shift, Shift Crew and Classification .. 143
STYLES ......................................... 133
Submitting Suggestions ....................... 153
Subscribe ...................................... 145
Subscribe button ................................ 129
System Health .................................. 150

Template ......................................... 144
Template Actions ................................. 71
Time stamps .................................... 147
Timestamp ....................................... 147
Top 3 ............................................ 127
Top 3 Pallets ................................... 128
Top Assets by Groupleader ..................... 127

131
Top Assets by Station.......................... 127
Trouble Shooting ............................... 154

U
User Dashboards................................. 67

V
Variance............................................. 90

Variance Accumulation.......................... 90
Vertical Color selector........................... 135
View Options ..................................... 23
View Types......................................... 22

W
Welcome to Envision............................. 10