
ONSIGHT FLOW GUIDE

Customized Reporting Overview

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TABLE OF CONTENTS

REPORT DESIGNER - OVERVIEW	3
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REPORT TOOL BAR	3
TAB BAR	4
PRESET BAR	4
CODE EDITOR	4

HANDLEBARS	5
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PREVIEW PANEL	6
TOOLBAR	6
LIVE PREVIEW	7

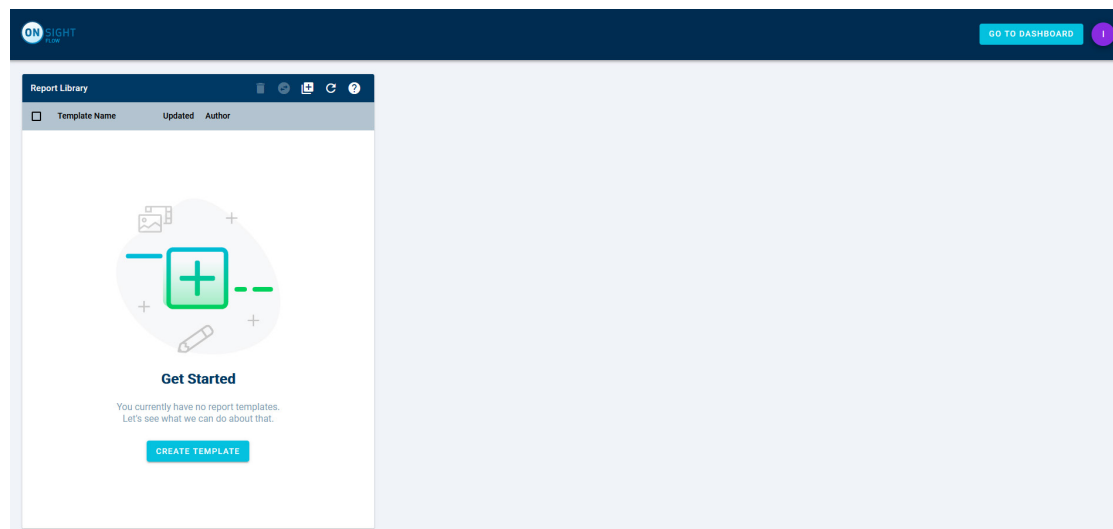
REPORT DESIGNER - OVERVIEW

The Report Designer allows you to create report templates using HTML. You are then able to set the default report template for your team, meaning that when you download a report on the Dashboard or app, your team's default report template is used, rather than the Onsight Flow default template.

Report templates are also used in triggers (see triggers for more information) where you can select a report template to use when a trigger is executed. In addition to this, you can set the default report template on a per-workflow basis, overriding the default report template for your team.

To use the report designer you must have either Owner, Administrator, or Editor permission.

The Report Designer can be accessed in the Dashboard by navigating to Settings and then clicking on the Reports button. When the Report Designer loads, you will see a screen that looks like this:



REPORT TOOL BAR

The toolbar has the following functionality:

1. Delete: Allows you to delete one or more templates.
2. Set Default Report: Allows you to set the default template for reports.
3. Create New Report: Click this button to start a new report.
4. Refresh: This will refresh the screen.
5. Help: This will bring up the help dialog.



TAB BAR

The tab bar allows you to switch between editing the body, header, and settings of the report template.

There are 3 tabs:

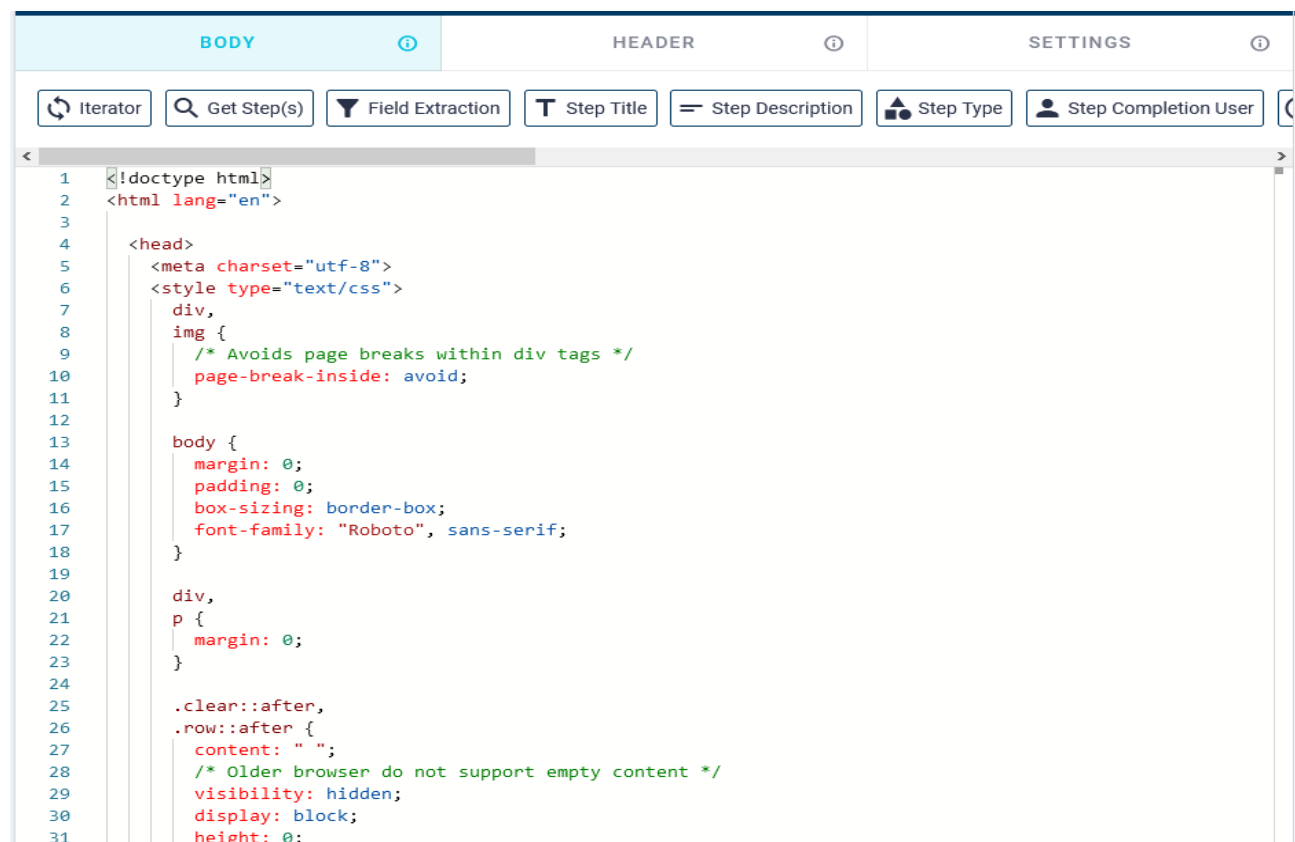
1. Body: allows you to edit the body of the report template. The body appears underneath the header and should contain the details about the steps completed in a job.
2. Header: allows you to edit the header of the report template. The header appears at the top of every page of the report.
3. Settings: allows you to edit the settings of the report template. These include the report orientation, and the ability to set the team's default report template.



PRESET BAR

The preset bar allows you to insert several presets for various pieces of data about the job or its steps. The preset bar scrolls horizontally. The presets that are available differ between the body and header of the report. Details about each preset can be found by hovering over each of the presets.

Clicking on a preset will either insert the text the preset contains at the last place that the cursor was positioned in the code editor, or produce a dropdown menu containing different preset options. Below is a partial snapshot when clicking the **BODY** tab.



Below is a partial snapshot when clicking the **HEADER** tab.

BODY ⓘ	HEADER ⓘ	SETTINGS ⓘ
<div>Job MetadataJob Total DurationJob Active DurationCompletion UserField ExtractionIf-condition</div>		
<div>Header Height48millimeters</div> <div>The vertical space allocated to the header of the report. Experiment with this value until the header is the desired height.</div>		

Below is a snapshot when clicking the **SETTINGS** tab.

BODY ⓘ	HEADER ⓘ	SETTINGS ⓘ
<div>Description</div>		
<div>Report orientation: <input checked="" type="radio"/> Portrait <input type="radio"/> Landscape</div>		
<div>SET DEFAULT This is not the default report template for this team.</div>		

CODE EDITOR

The code editor is where you can make changes to the HTML of the body and header of the template.


The code editor has several useful features that help you when editing the report template:

- Live preview: the changes made within the code editor will be reflected in the preview panel within a few seconds of the last change.
- Auto-completion: typing a space will display a list of fields that are contained within the job. You can use the up and down arrow keys to highlight the desired field and then press either enter or tab to insert that snippet.
- Error detection: if you make an error in the Handlebars code, a red banner will be displayed at the bottom of the code editor informing you what the error is, and the line on which the error is located. This should help you locate and fix errors, as reports cannot be generated, previewed, or saved while there are Handlebars errors.
- Syntax highlighting: text within the code editor will be highlighted in different colours to make it easier to read the code.
- Command palette: right-clicking on the code editor and then clicking the Command Palette option will display a list of useful commands.

HANDLEBARS

Report templates are written using a mix of HTML and a templating language called Handlebars. You may notice that in the presets, auto-completion items, or boilerplate report, there are pieces of text surrounded by curly brackets, such as `{{JobTitle}}`. The curly brackets denote that the text will be replaced by the value of the field within the curly brackets. For example, the `{{JobTitle}}` text would be replaced in the report by the title of the job.

Something that you should keep in mind when using Handlebars is the context in which fields are used. For example, before you can get the value of a step using the `{{Value}}`, you need to make sure that you are within the context of a step. You can do this by using a step iterator (see the Iterator presets in the Body tab's preset bar). When you are inside the step iterator, you can reference the fields contained within a step.

In order to get a good idea of the fields available within various contexts, familiarise yourself with the boilerplate report, and then take a look at the Job Data by clicking on the  icon on the preview panel's toolbar.

Handlebars reference: <http://handlebarsjs.com/guide/#what-is-handlebars>

Header height (header tab only)

Header Height

48

millimeters



The height of the header in the report. Experiment with this value until the header is the desired height.

The header height can be used to set how tall the header is (in millimeters). This value should be experimented with until you are happy with the resulting report in the preview panel.


PREVIEW PANEL

The preview panel allows you to see a live preview of the report template that you are editing. There are a couple of components in the preview panel:

1. **Toolbar:** the toolbar allows you to select the job that you want to preview and view its data.
2. **Live preview:** the live preview allows you to see a live PDF preview of the report template you are creating using the job selected in the toolbar.

Preview Pump Inspection ▼ 10/27/20 - Pump123 (toby.sackey@librestr... ▼  

Pump123
Completed By - toby.sackey@librestream.com
Started - 27 Oct 2020 at 12:46:04
Duration - 0:00:35


Completed - 27 Oct 2020 at 13:21:41
Actual Duration - 0:00:07

Completed Steps

Inspection information
Completed By - toby.sackey@librestream.com
Total Duration - 00:01:36 Active Duration - 00:01:36

Date
Date of Inspection
27 Oct 2020 at 12:46:00

Department
Enter service department
Maintenance

Asset ID
Please capture or enter the pump asset ID
This step has no value.

Do you have the required tools?
Completed By - toby.sackey@librestream.com

TOOLBAR

The toolbar allows you to select the job that you want to preview and view its data.

Preview Pump Inspection ▼ 10/27/20 - Pump123 (toby.sackey@librestr... ▼  

The toolbar has the following functionality:

- **Workflow Selection:** this dropdown menu allows you to select a workflow to filter the jobs by.
- **Job Selection:** this dropdown menu allows you to select a job to preview the report template against.
- **View Job Data:** this allows you to view the selected job's JSON data so that you can see which fields you can use in the report template.
- **Refresh Workflows and Jobs:** refreshes the workflows and jobs listed in the workflows and jobs dropdowns.

LIVE PREVIEW

The live preview allows you to see a live PDF preview of the report template you are creating using the job selected in the toolbar.

Preview

Pump Inspection


10/27/20 - Pump123 (toby.sackey@librestr...

Pump123

Completed By - toby.sackey@librestream.com

Started - 27 Oct 2020 at 12:46:04

Duration - 0.00:35



Completed - 27 Oct 2020 at 13:21:41

Actual Duration - 0.00:07

Completed Steps

Inspection information

Completed By - toby.sackey@librestream.com

Total Duration - 00:01:36 Active Duration - 00:01:36

Date

Date of Inspection

27 Oct 2020 at 12:46:00

Department

Enter service department

Maintenance

Asset ID

Please capture or enter the pump asset ID

This step has no value.

Do you have the required tools?

Completed By - toby.sackey@librestream.com

Total Duration - 00:01:14 Active Duration - 00:01:14

Do you have the required tools to perform this inspection?

Yes

Once you've selected a workflow and a job, whenever you type into the editor, a preview will be generated and displayed. If there are Handlebars errors (in which case you will see a red banner at the bottom of the code editor), these must be corrected before a preview will be generated.