ONSIGHT FLOW GUIDE

Overview

LIBRESTREAM

TABLE OF CONTENTS

1. GETTING STARTED - QUICK GUIDE

INTRODUCTION

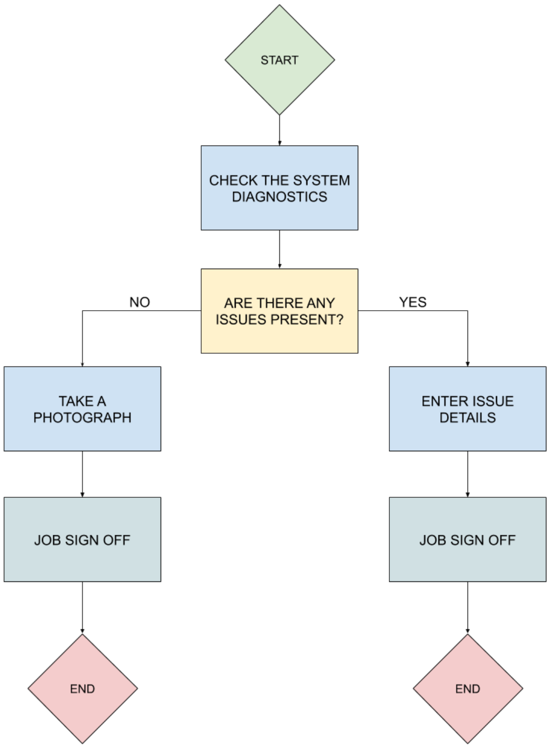
Onsight Flow is designed for workers completing a job, focusing on ease of use and simplicity while enabling efficiency improvements and true insight into business processes.

Onsight Flow is made up of a few key components:

COMPONENT	PURPOSE
Editor	Designing workflows
Mobile and Wearable Clients	Completing jobs, based on a workflow template
Dashboard	Configuring settings, managing users, viewing your company data
Accounts	Managing your Onsight Flow account

A **'workflow'** is a template for a job and is created inside the **'Editor'**. For example, the user might need to complete an inspection of some equipment. In such a job, the person carrying out the inspection might need to check the equipment diagnostics, confirm there are no issues, take a photograph and sign off on the job. If there is an issue present, they may need to enter details about the issue. Each of these is a **'step'** inside a workflow.

The workflow for the example above might look something like the following:



When the user executes the workflow template, they're completing a **'job'**. When the job is complete, the data is sent up to the server and is available for the administrator to see. Jobs are completed on a **'client'**, which can be an Android phone or tablet, an iPhone or iPad, or a Realwear HMT-1 head-worn wearable device.

In the **'Dashboard'**, the administrator can see data for all jobs completed inside their team. The administrator can also configure settings for the team, manage users and access, configure workflow access rights, set up triggers, and much more.

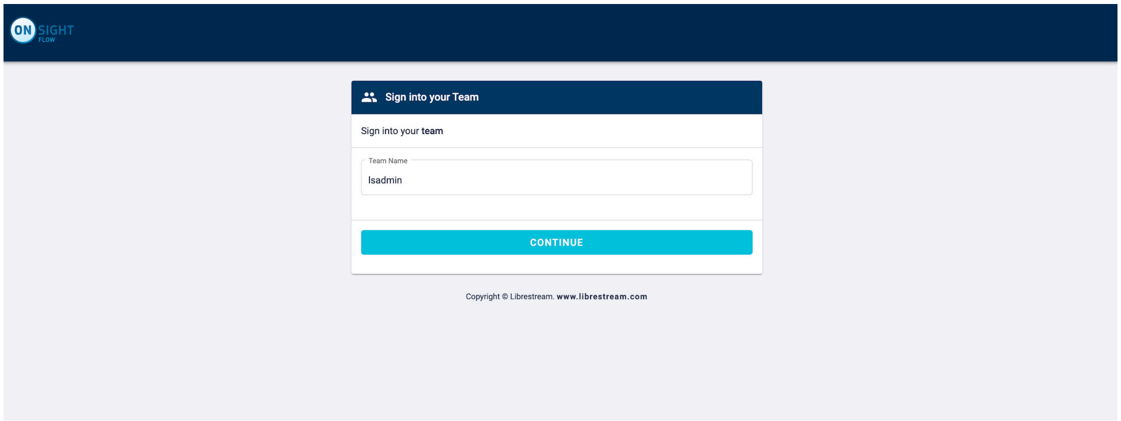
Every user can access the **'Accounts'** screen, where they can manage their account.

An authorized user can create and publish workflows using the Onsight Flow Editor. Once published, these same workflows can then be managed directly from the Onsight Flow Admin Dashboard.

User permissions can be set by a site administrator.

ADMIN DASHBOARD

To access the Onsight Flow Admin Dashboard from your browser (supported browsers: Google Chrome, Microsoft Edge, Internet Explorer v11+ and Firefox) go to: **https://dashboard.flow.librestream.com/workflows.**



From the Admin Panel, authorized users can upload new workflow templates and manage versions of existing ones, archive workflows and manage the permissions of each workflow. Users can also manage their account settings

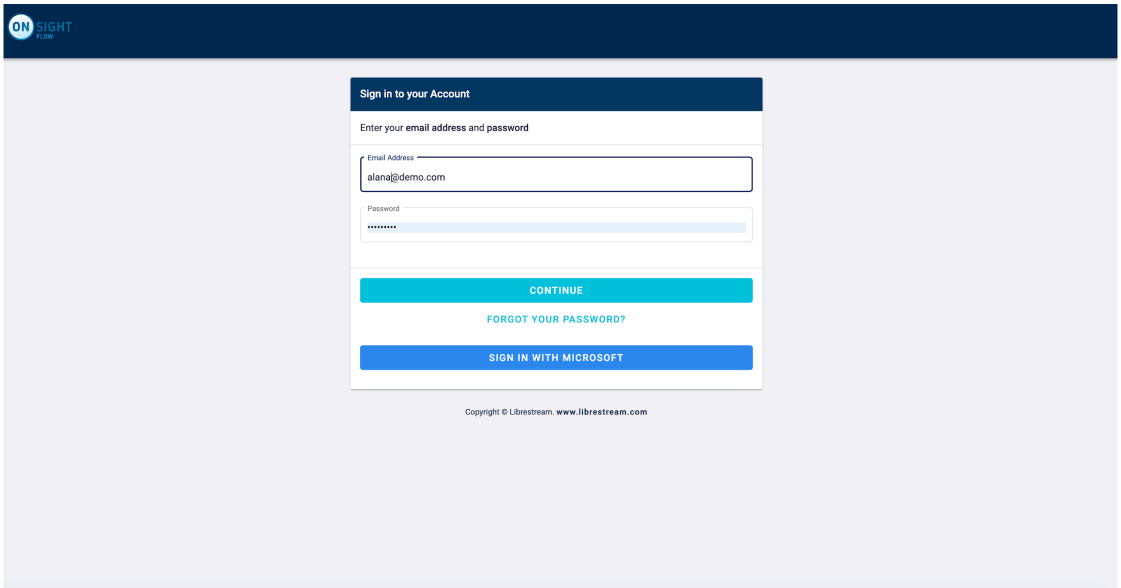
FIRST LOGIN

When a new company or team signs up to use Onsight Flow, you will be sent credentials for your **'Owner'** account. This account is the master account and has full rights to every area of your subscription.

It is recommended that you securely store your Owner account details and create the **'Administrator'** account(s) to manage your subscription on a day-to-day basis.

For your first login, go to **https://dashboard.flow.librestream.com**. Firstly, enter your **'Team'** name.

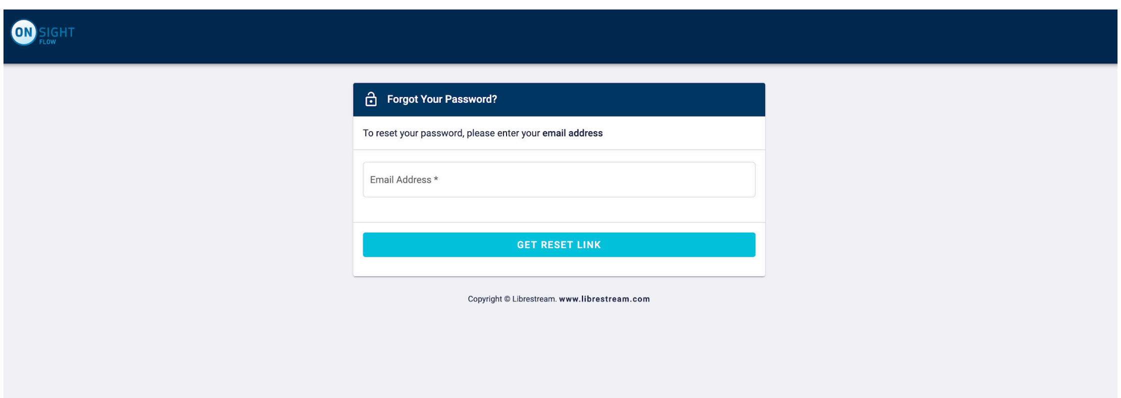
Once you have entered your team name you will be required to enter your Owner credentials to access the system, these will be set by your administrator. You can also sign in with Google if your administrator has set this as an option.



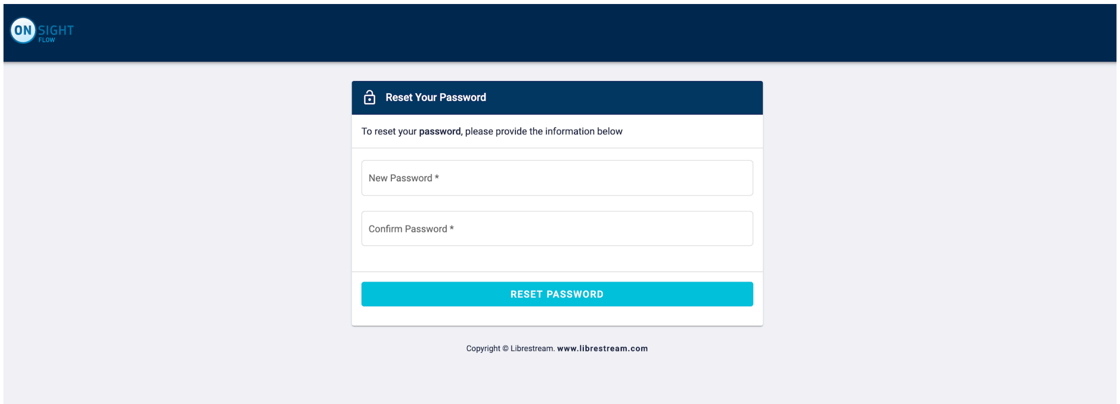
Once logged in, see the article Creating a user to learn about how to set up your first users.

FORGOT YOUR PASSWORD

If you cannot remember your **password** you can reset your password from the login page. Select 'forgot your password' and enter your email address. If your email address is **registered** you will receive an email containing a reset link.



Your reset link will expire after 30 minutes. To reset your password after this link has expired, you will need to request a new link.



Occasionally you may find that your organization's IT rules block the password reset email from arriving in your inbox, in this event the fallback option is to ask a user within your team that has a higher permission level than your own user account to generate a new password for you. They can do this by navigating to your user account from the User panel in the dashboard, from there click Reset Password and follow the instructions; if Reset Password is greyed out it means they don't have a high enough permission to reset the password of that particular user.

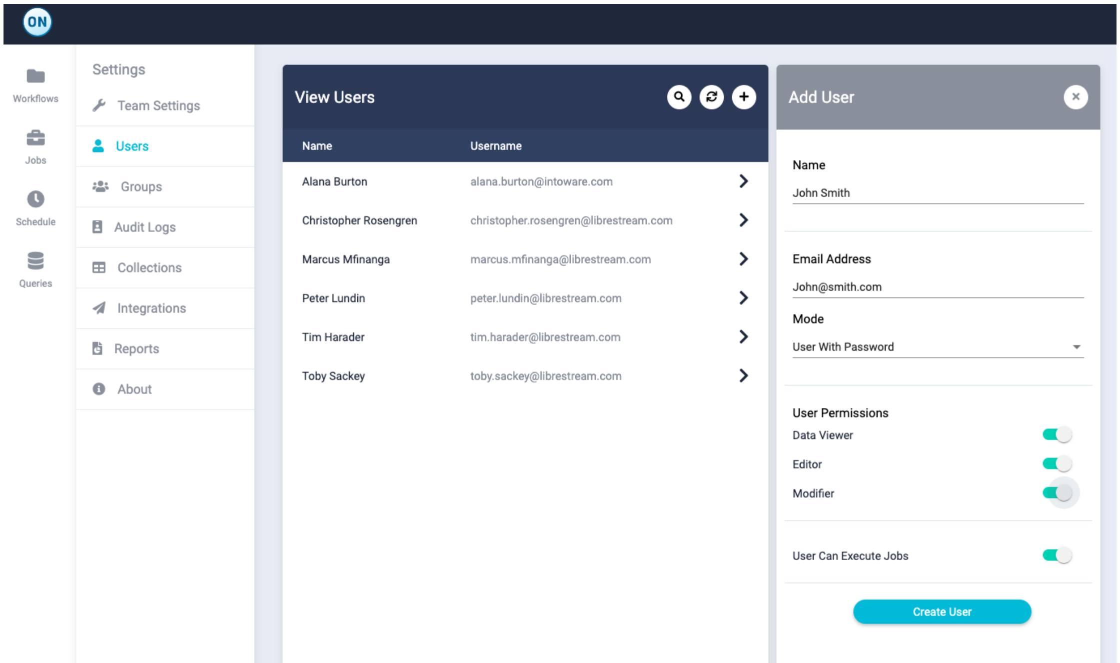
CREATING A USER

New users can be created inside the Dashboard Settings Menu by an Administrator.

Clicking on Users from the Settings Menu will open the View Users panel. The default view is a searchable list of all Users.

Select the plus button at the top right-hand corner of the view user panel, this will open the Add User panel.

Type in the user's name and email. Their email will become the user's Onsight Flow username.



Under Mode, if ‘User with Password’ is selected, a password will be generated upon creation of a new user account. Please Note: The password MUST be copied and saved as for security reasons the password is no longer available after the panel is closed. If ‘User with 3rd Party’ is selected the user will not be given a password. Instead, they will be able to login using credentials from a supported 3rd Party Account (for example Microsoft or Google).

Set any relevant User Permissions. To enable a user to perform jobs on a mobile device execute jobs will need to be enabled (green). It is enabled by default.

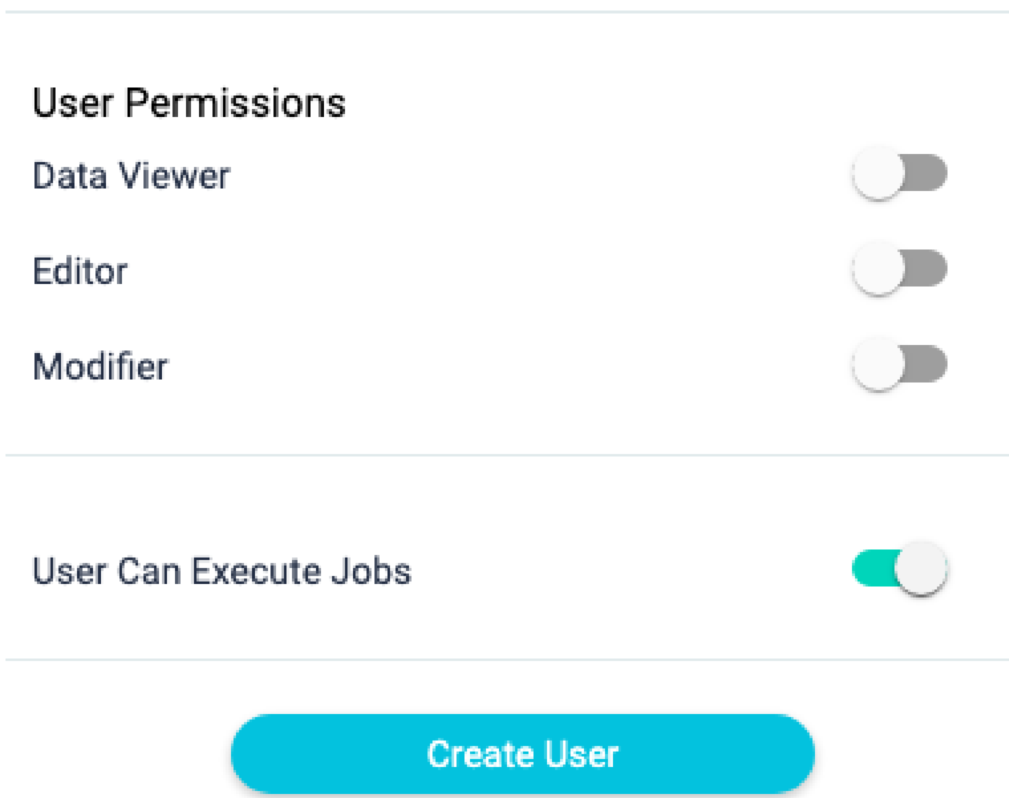
Administrators are able to see all jobs, users and workflow templates (only owners can give admin permissions)

Data Viewers are able to see all jobs and are able to delete or create jobs if they had other permissions (modifier and executor respectively)

Editors can manage workflows

Modifiers are able to edit data on the server and delete jobs

Approvers are able to manage the approval of workflows that are in the Draft or For Approval state



Once all information has been entered and options selected, click the Create User button to add a new user

EDITOR OVERVIEW

INSTALLING THE EDITOR

To install the Onsight Flow Editor, you will need to download the executable file and ensure you meet the minimum system requirements detailed below. You can then run this file to begin the install.

Minimum System Requirements:

.NET 4.6.1

Windows 7 or above

500 MB Disk space

YOUR FIRST WORKFLOW

Workflows can be created either by clicking on New Workflow from the File Menu or from the Start Page. Then either select to start from a Blank Template or from one of the pre-made templates.

Creating your workflow steps in the Editor is easy. Firstly, enter the Workflow name (mandatory) and then the Author and Description (optional). Finally, choose a directory to save the workflow file and click on Create.

The Start Page will then be replaced with the top level workflow editor tab.

Drag in your steps from the Step Panel on the left, choosing from the various step types (see more information here). Connect your steps by dragging arrows between them (see more information here), and then ensure that your workflow validates by clicking on the Validate button at the top.

Once your workflow is validated, you can save your workflow file by clicking Save Workflow from the File Menu.

MOBILE APP

APP SETUP AND LOGIN

HMT-1

To install the app on to your HMT-1 device, install via the Realwear Explorer App for your laptop or PC. Please see the instructions here.

Android

Onsight Flow is compatible with Android Version 5 and above. You can download the latest Onsight Flow app from the Google Play Store.

iOS

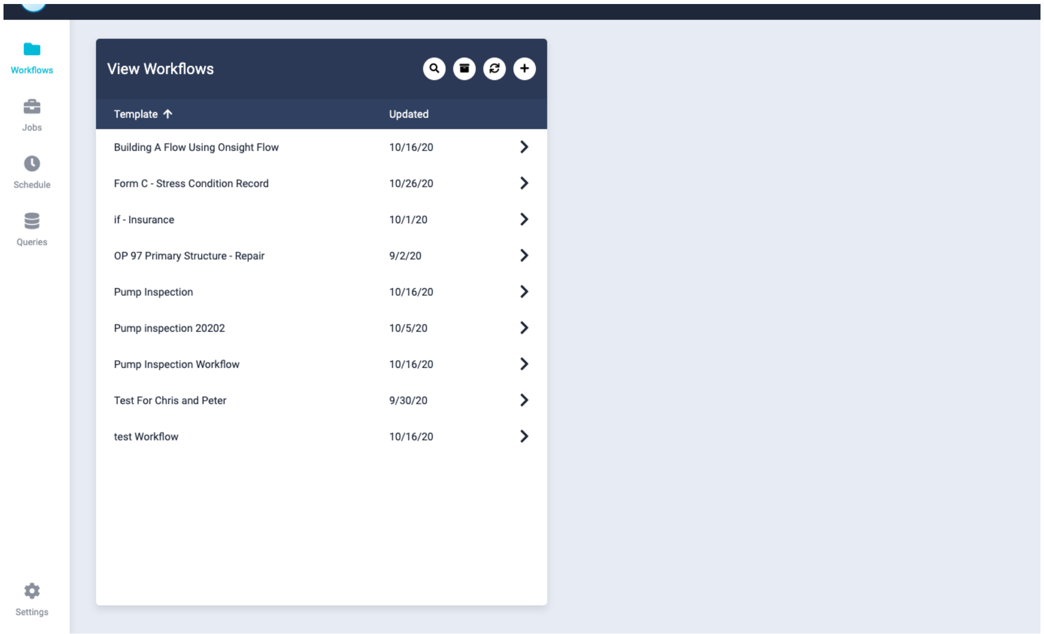
Onsight Flow is compatible with the current and previous versions of iOS (12, 13 & 14). You can download the latest Onsight Flow app from the iOS App Store.

2. AUTHORING AND MANAGING WORKFLOWS

VIEWING WORKFLOWS

Onsight Flow makes it easy to view and manage your workflows.

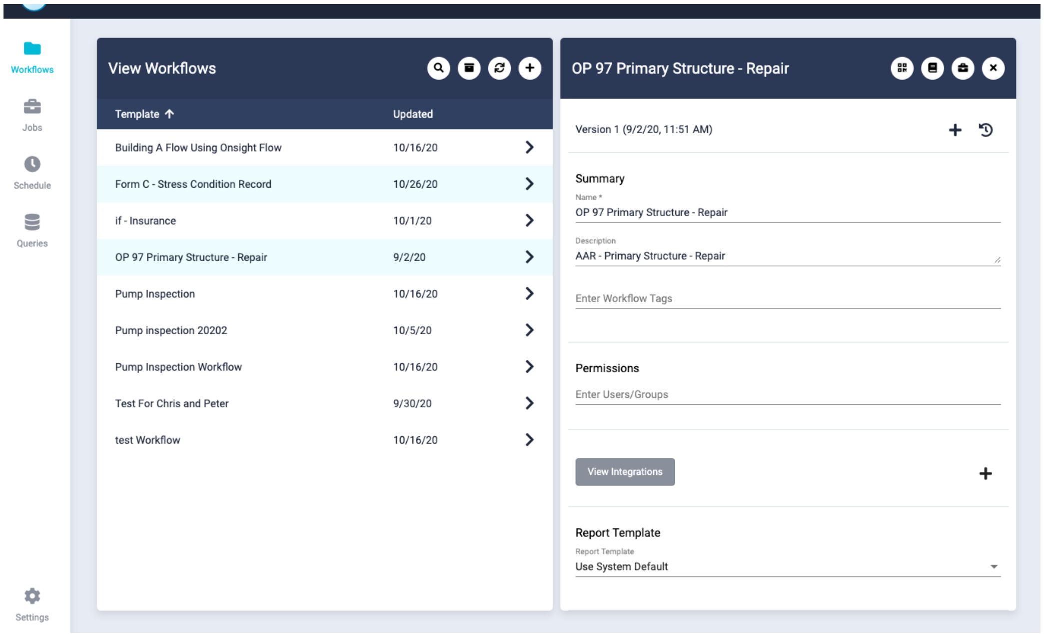
View workflows by selecting workflows in the navigation panel. Once selected this will open up the view workflows tab where you will see a list of all workflows.



From this panel, you will be able to view the workflow name, and the last updated date, this will show as the date or time depending on whether it was last updated in the same day or historically.

You can also filter, search, refresh, and add workflows from this panel using the buttons in the view workflows header.

To open the workflow details panel, click on the Workflow you would like to view. This will open up the panel to the right of the list. From here you can view a summary of the workflow selected, permissions, triggers, advanced information such as the Workflow ID and if you have the required permissions you can archive a workflow.

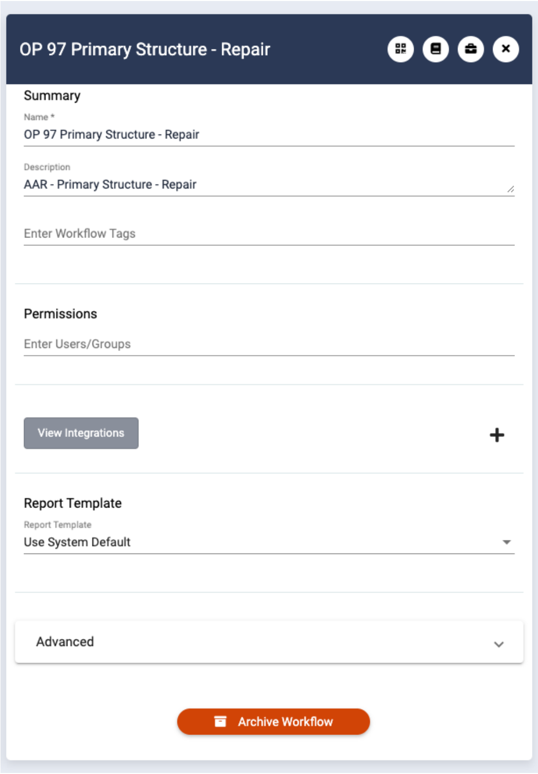


ARCHIVING WORKFLOWS

You may want to archive a workflow so that it can no longer be downloaded or edited, this effectively locks that workflow.

To archive a workflow you will need to have the relevant permissions set by your administrator.

Select the workflow that you wish to archive from the view workflow panel. This action will then open the workflow details panel.

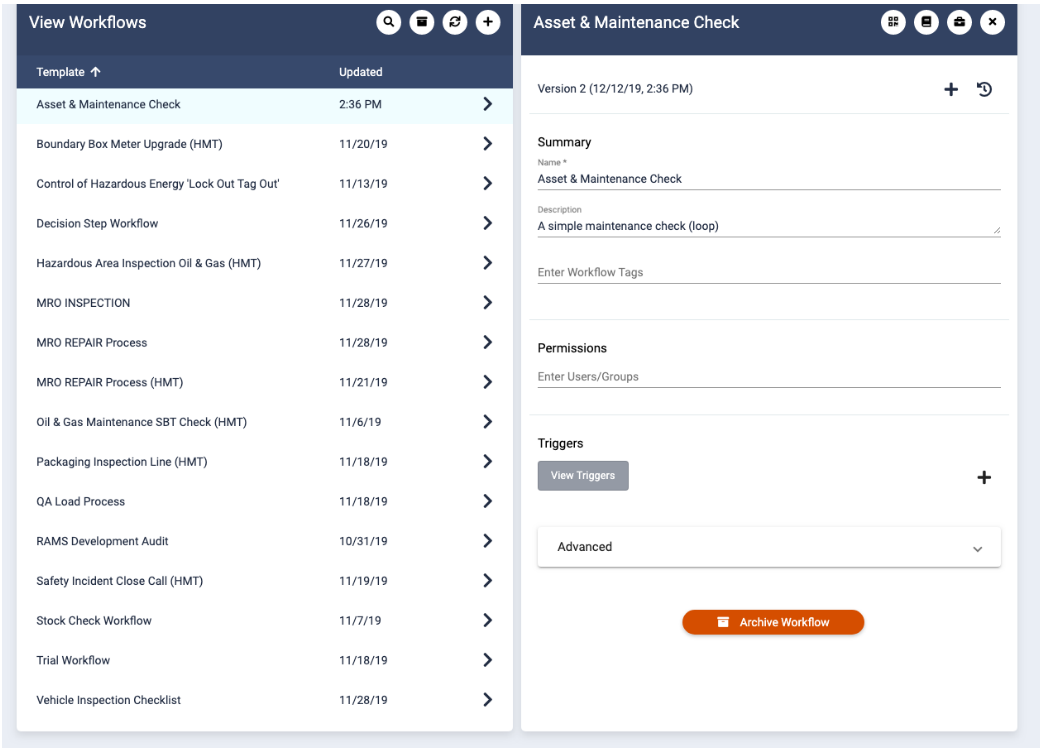


If you hold the required permissions you will see the archive workflow button at the bottom of this panel. If you do not have the relevant permissions, this will not show. To archive the workflow, select the archive workflow button, once selected a pop-up will ask you to confirm or cancel.

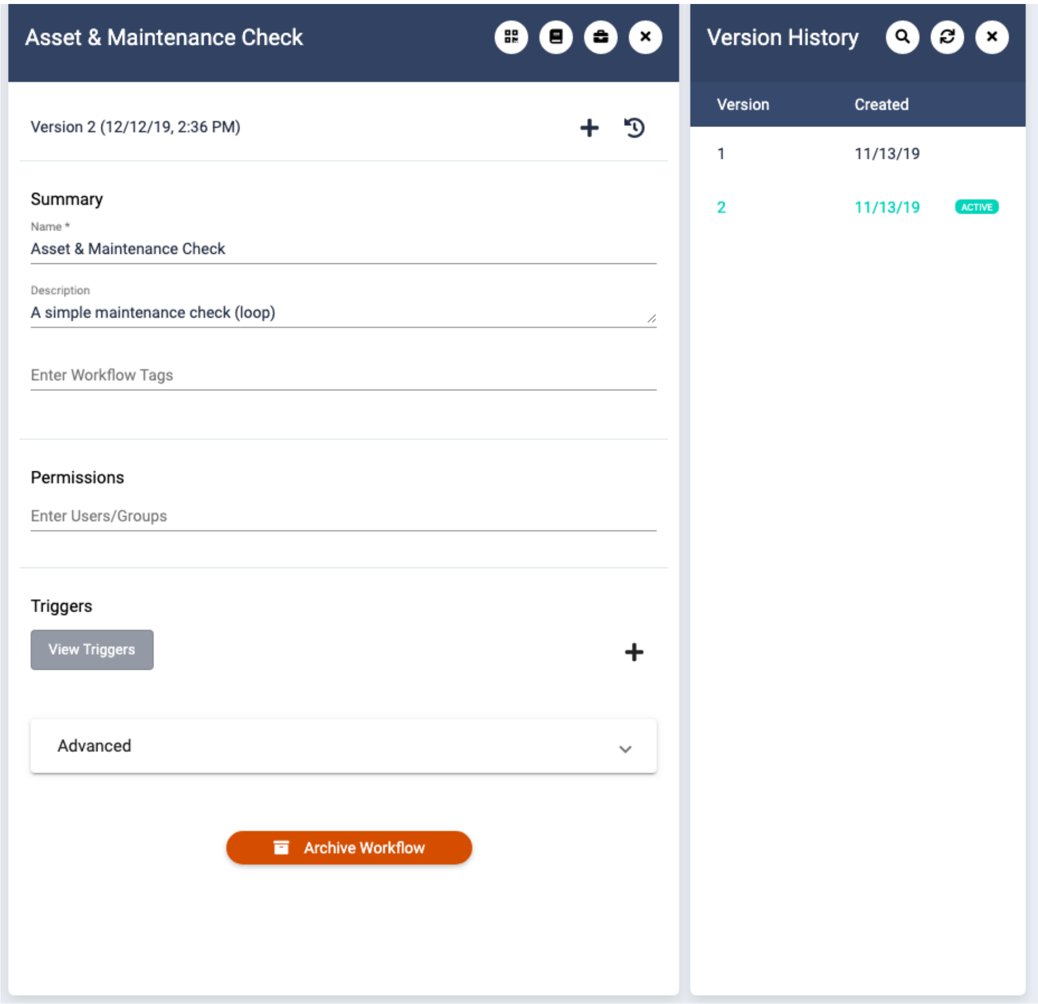
Once archived, you can not unarchive a workflow. You can restore a previous version if your permissions allow.

MANAGING WORKFLOW VERSIONS

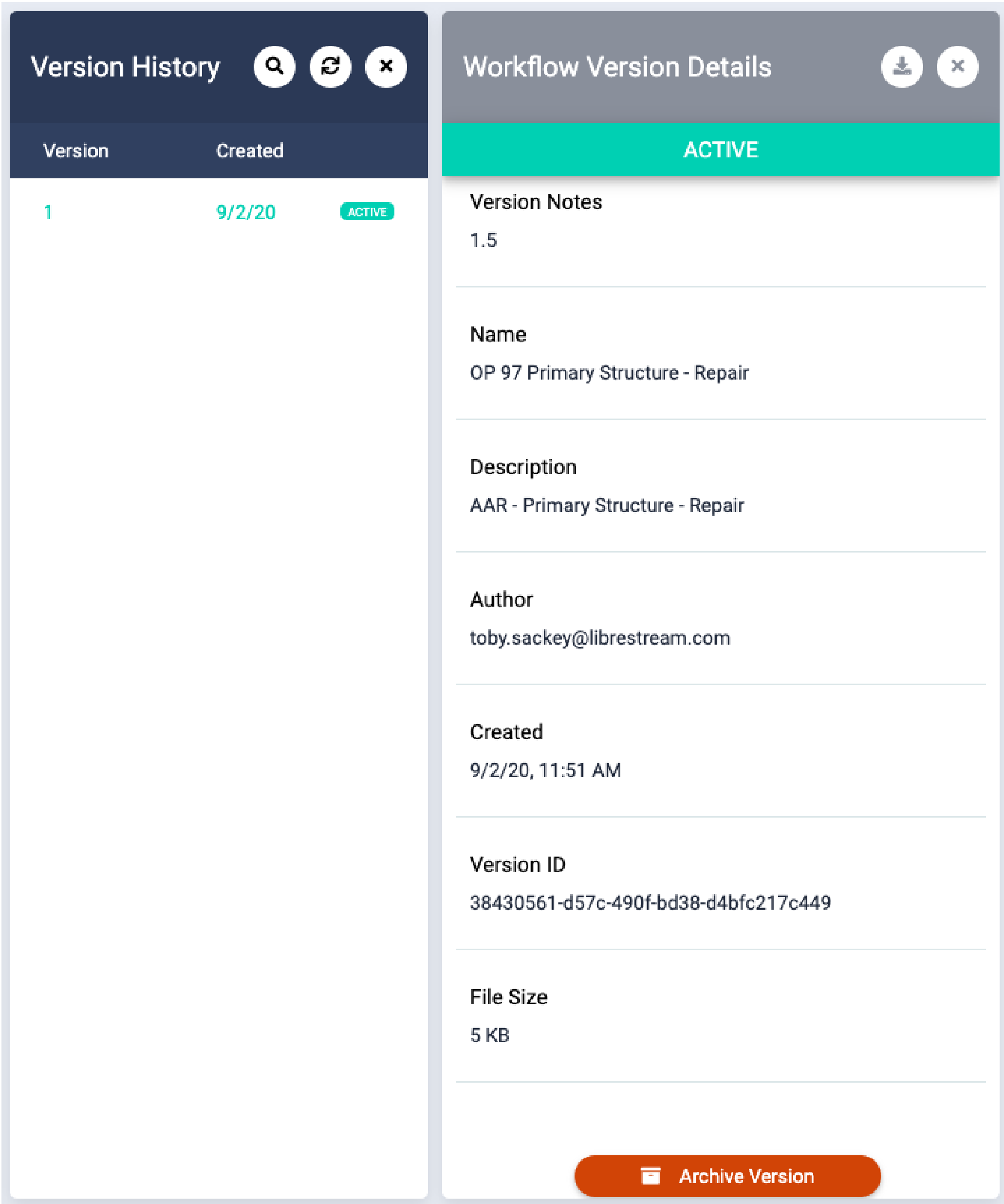
The current workflow version can be found in the Workflow details panel and will display the date and time it was last updated. To access this, select the workflow you wish to view.



Clicking on the Workflow Version History button will open up the Version history panel. This will show the version number, the date it was created and the status.

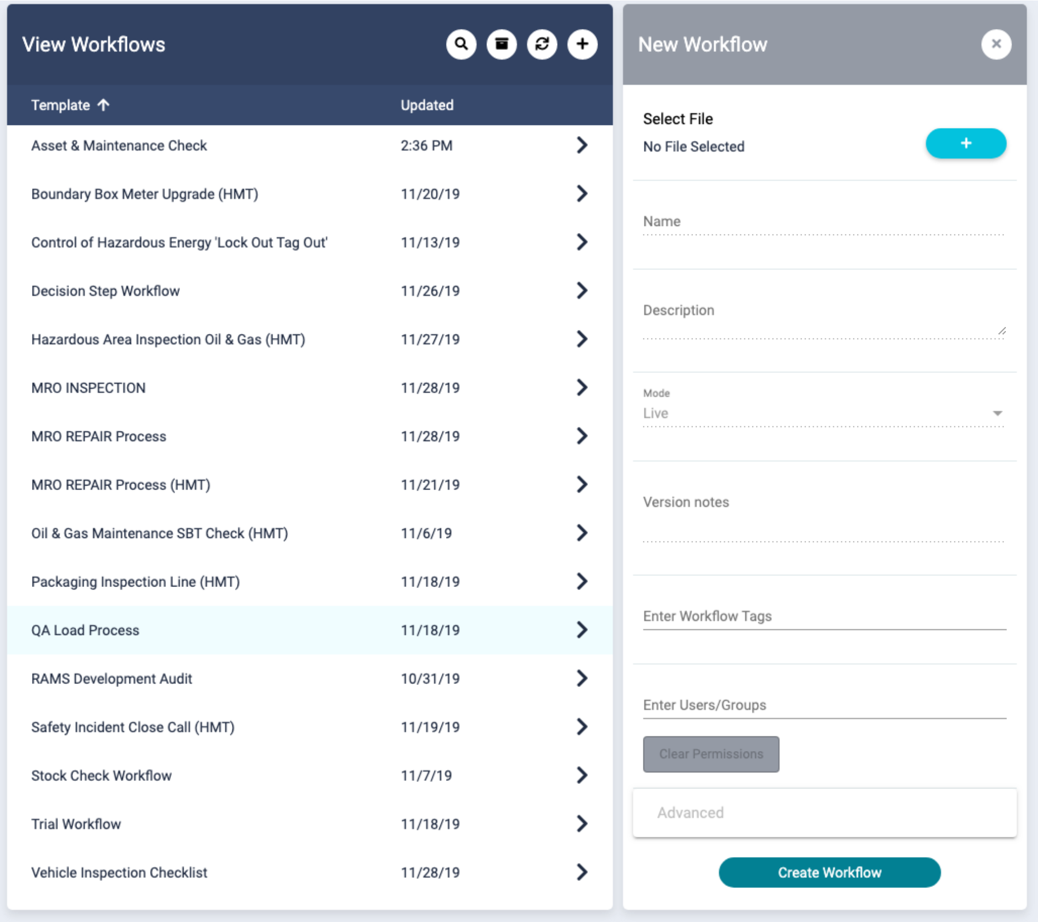


To view further information such as notes, name, description, and author version ID select the required version, this will open the version detail panel. You can also archive the version (permissions allowing) from within this panel.


Version History
Version
Created
1
9/2/20
ACTIVE
Workflow Version Details
ACTIVE
Version Notes
1.5
Name
OP 97 Primary Structure - Repair
Description
AAR - Primary Structure - Repair
Author
toby.sackey@librestream.com
Created
9/2/20, 11:51 AM
Version ID
38430561-d57c-490f-bd38-d4bfc217c449
File Size
5 KB
Archive Version

UPLOADING A WORKFLOW

To upload a new workflow file press the plus icon in the "New Workflow" panel and select the workflow file from your computer.



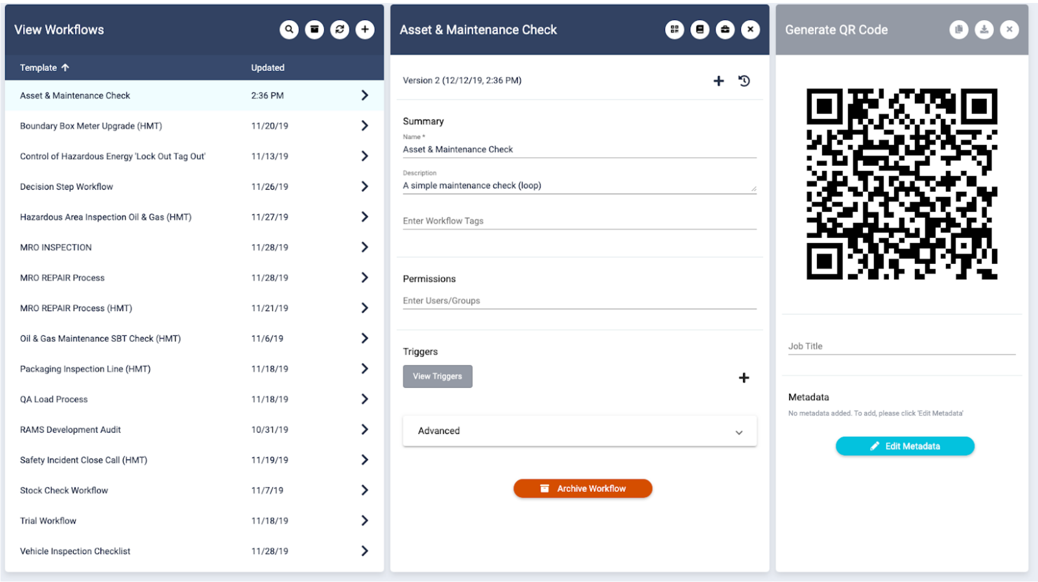
After selecting the file, the Name and Description are populated from the Workflow, but can be amended in the panel.

The workflow can then be uploaded from your drive and set to either Live (default), Draft, or For Approval. Workflow Permissions can be set and amended and Version Notes can be also added.

GENERATING QR CODES

A QR code can be generated for each workflow to enable that workflow to be opened as a new job using the camera on a client device. For example, a QR code can be attached to a location or a piece of equipment to ensure that the correct workflow process is used.

To generate a QR code, select the workflow for which you want to generate the QR code for from the view workflow panel, this will open the workflow details panel. Select the generate QR code button on the navigation bar alongside the workflow Title. This will open the generated QR code panel. From here you can add the job title and the metadata. Once this information is entered you can then copy the deep-link to the QR code or download it to your files.

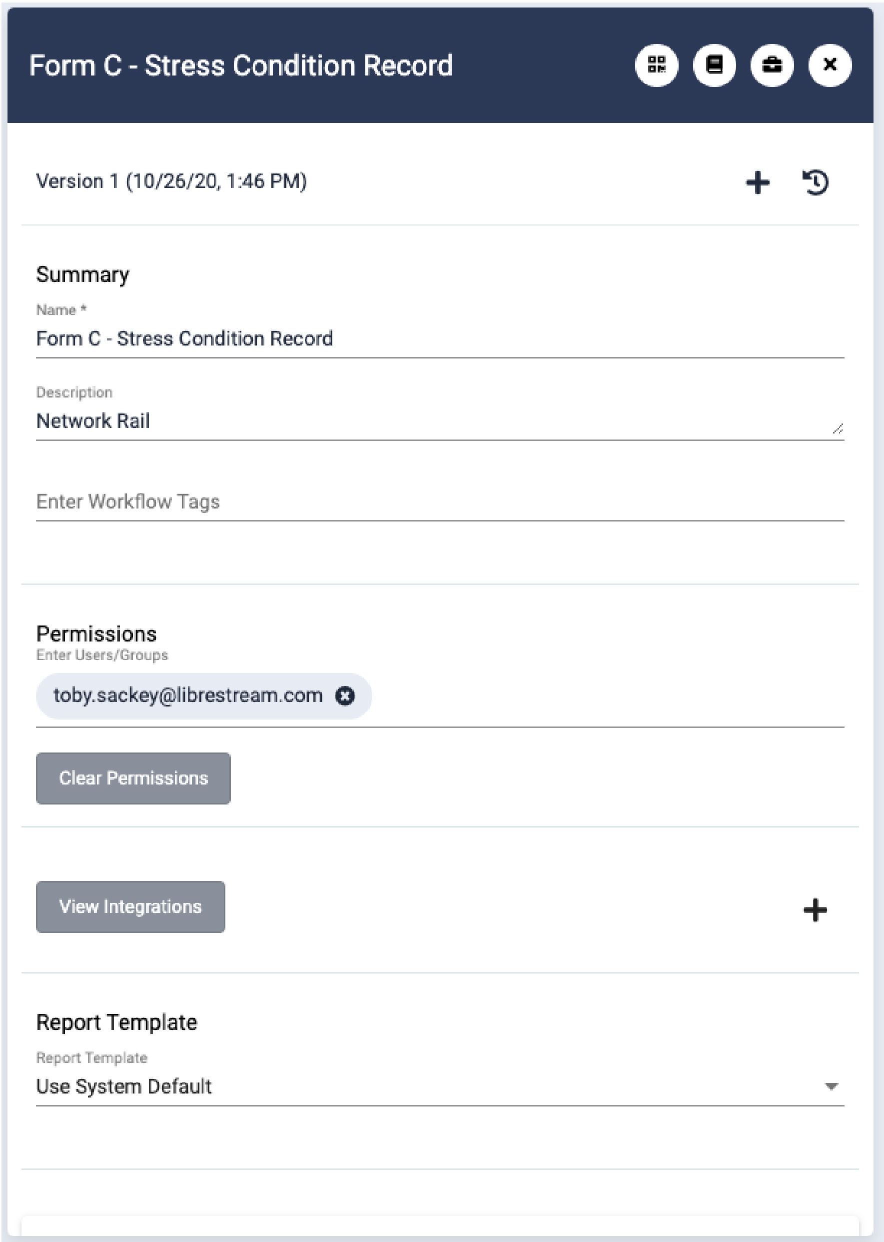


MANAGING WORKFLOW PERMISSIONS

Onsight Flow allows you to control which users and groups can access individual workflows.

Permissions can be set for each individual workflow in the Workflow Details Panel. To set permissions, select the workflow for which you would like to set permissions to open the Workflow Details Panel. Under permissions, if there are no users or groups specified then the workflow will be available to all users.

To restrict access to specific users and groups enter the users and groups that require access (all unspecified users and groups will lose access).

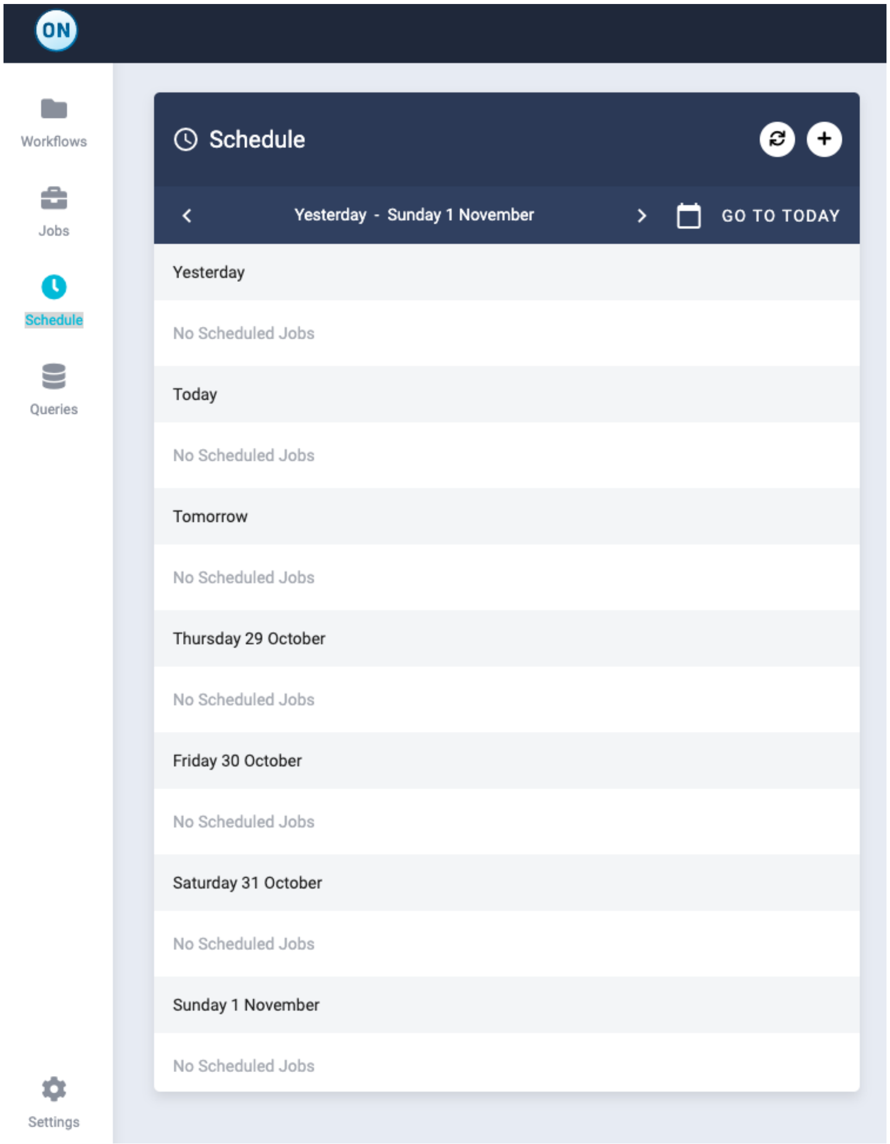


Note: Groups are created in the Settings section.

SCHEDULING JOBS

The scheduler feature allows owners or administrators to schedule jobs to be completed by a specified user- determined either by their start date or an open-ended date.

To create or view a list of currently scheduled jobs, select the scheduler on the left navigation bar in your Onsight Flow dashboard.



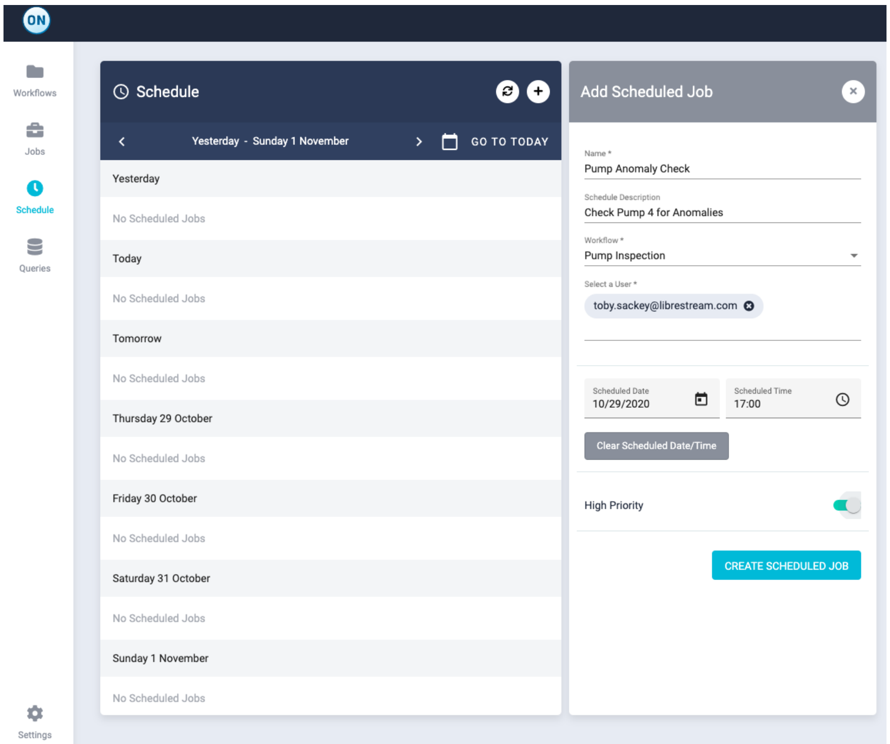
Once selected this will open up the scheduler panel. From here you will see a list of scheduled jobs in weekly view. To change which week you are viewing, select the arrow to either go back to view historic scheduled jobs and their status or forward to see future scheduled jobs.

If you want to search for a scheduled job you can do this by selecting the magnifying glass in the top navigation bar of the scheduler panel, typing in the name of the job you are looking for, this will then bring you to the week which includes that job.

To refresh the list, select the refresh button in the top navigation bar of the scheduler panel.

To navigate back to the current week, select go to today, this will bring you back to your current week view.

To schedule a job, select the plus button in the top navigation bar of the scheduler panel. This will open the add scheduled job panel where you can enter your job details and select the workflow template that should be attached to the job.



NAME

Give the job a name. This might be a simple name or it could be a work order number for example if your business has a specific reference to use.

SCHEDULE DESCRIPTION

Give the job a name. This might be a simple name or it could be a work order number for example if your business has a specific reference to use.

Schedule Description

Check Pump 4 for Anomalies

WORKFLOW

Select the workflow that you would like the user to follow from the dropdown list of live workflows.

Workflow *

Pump Inspection

SELECT A USER

From here you can select an individual user that you wish to assign this scheduled job to. The selected user must be added to the workflow to enable them to see the scheduled job. **(see managing workflow permissions for more information).**

Select a User *

toby.sackey@librestream.com

If the user is not added to the workflow an error message will flag up when you select schedule job, this will prompt you to add them, select 'yes' and this will add your selected user to the workflow.

Add user to workflow?

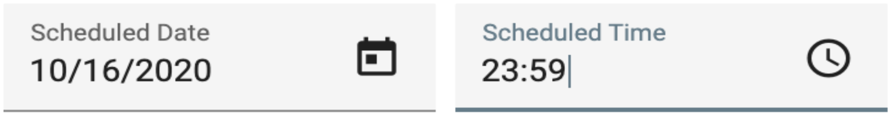
The selected user currently does not have access to the selected workflow. Do you want to grant them access?

No Yes

START DATE AND TIME

Select the date you want the job to start by. Once a date is selected you can change this date by clicking on the date, this will open the calendar for you to select an alternative date. If you do not want to add a scheduled date you can leave this empty or select clear the scheduled date.

To set the time you want the job to be completed by simply type the time in. The format for this is 24 hours and so 5 am is 5:00 and 5 pm is 17:00.

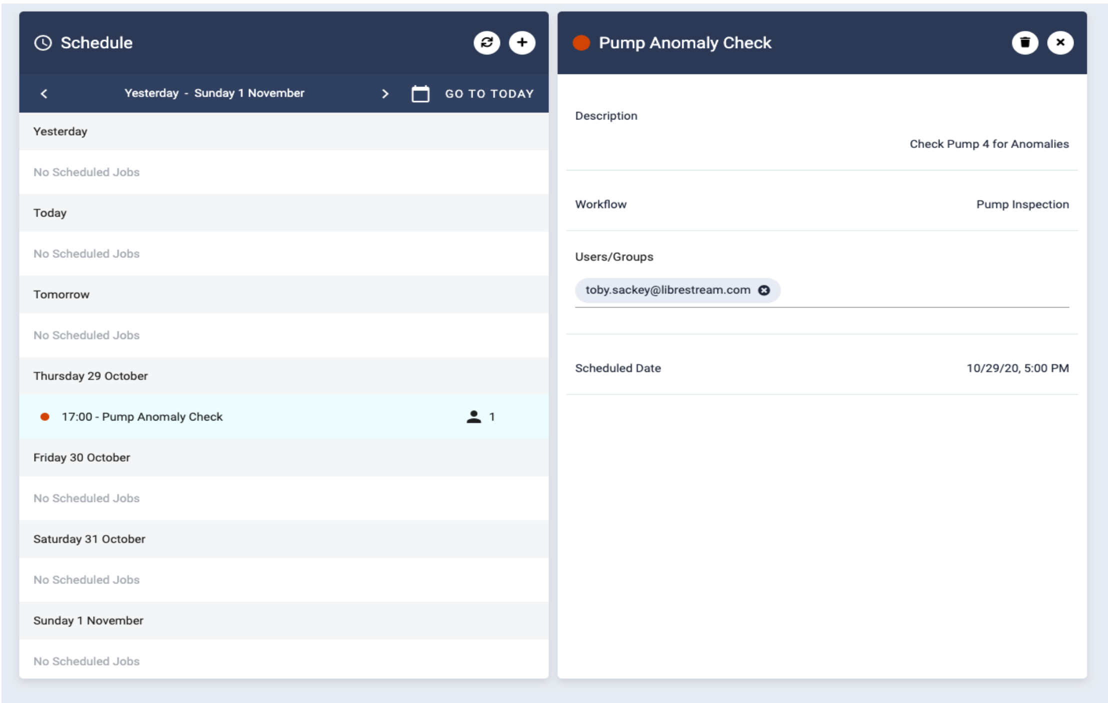


START DATE AND TIME

Preset the priority of the job by using the toggle. An icon is shown against high priority jobs in the application so the user can select the next work item correctly.

Once you have entered the above you can select 'create scheduled job'.

To view the scheduled job you can return to the main scheduler panel, navigate to the date that you scheduled the job to be completed by and select the job you want to view.



Here you will be able to see the scheduled details, you can also change the user this has been assigned to, remembering that that user you wish to complete the job must have been set in the workflow setting permissions. You can also see the status of the job.

Once a job has been completed, you will see a green tick to the right of the job both in the schedule panel and in the job panel.

COMPLETING A SCHEDULED JOB - MOBILE

Once a job has been scheduled and assigned to a user it can be accessed on the home screen on their chosen device. If you have set a job to be started on a specified date the job will show on the home screen and include the date it is scheduled for. If a job has been scheduled and is now overdue, this will also show on the home screen but will have a red icon to highlight that it is overdue.

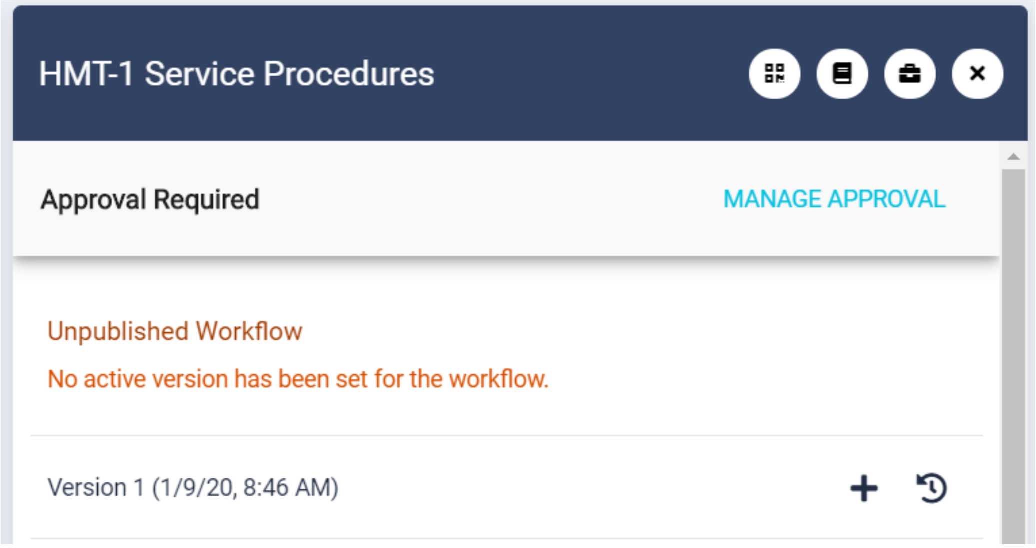
The user can then complete the jobs as normal. See Completing a Job for more details. If a scheduled job is overdue this will be highlighted.

<<insert scheduled job on a device image>>

WORKFLOW APPROVALS

New and updated workflows can be uploaded and published for approval (see ‘uploading a Workflow’ for information on publishing for approval).

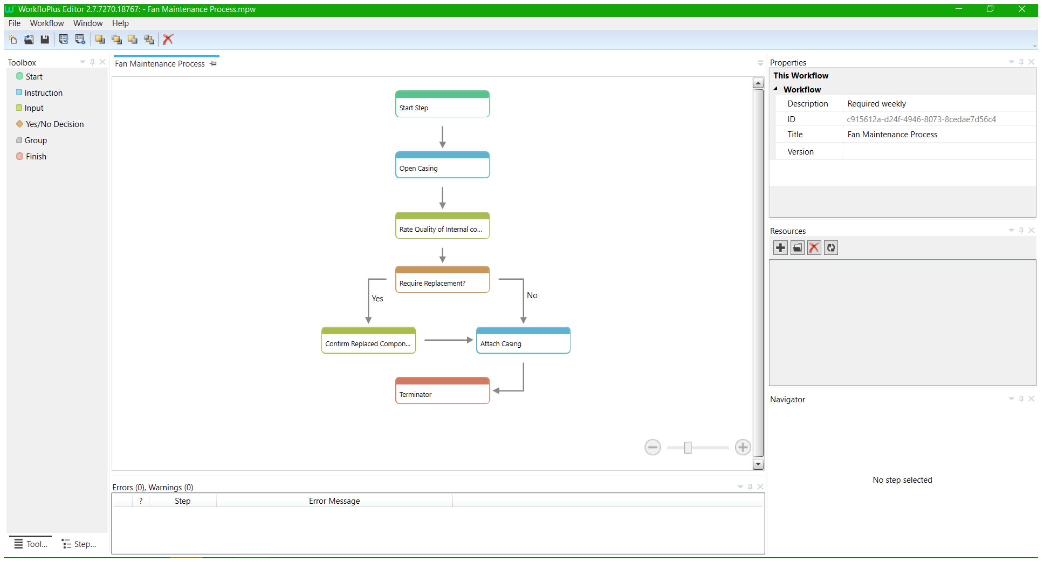
When a workflow is published for approval, users who have the appropriate permissions will be notified that a workflow is awaiting approval.



THE EDITOR INTERFACE

The Editor makes it easy to create, edit and save workflows ready to be published.

The Editor can be installed locally on any Windows computer or laptop. Workflows can be created offline and saved locally for publication via the Admin Dashboard.



The Menu Bar contains the File Menu, Workflow Menu, Window Menu, and Help Menu. Below the Menu Bar is the Shortcuts Menu.

Below the Onsight Flow logo is the Workflows Quick Link Menu.

The Toolbox (left-hand side) displays the step types (drag and drop functionality when creating a workflow) and below that the Step List, containing a list of steps added to the workflow.

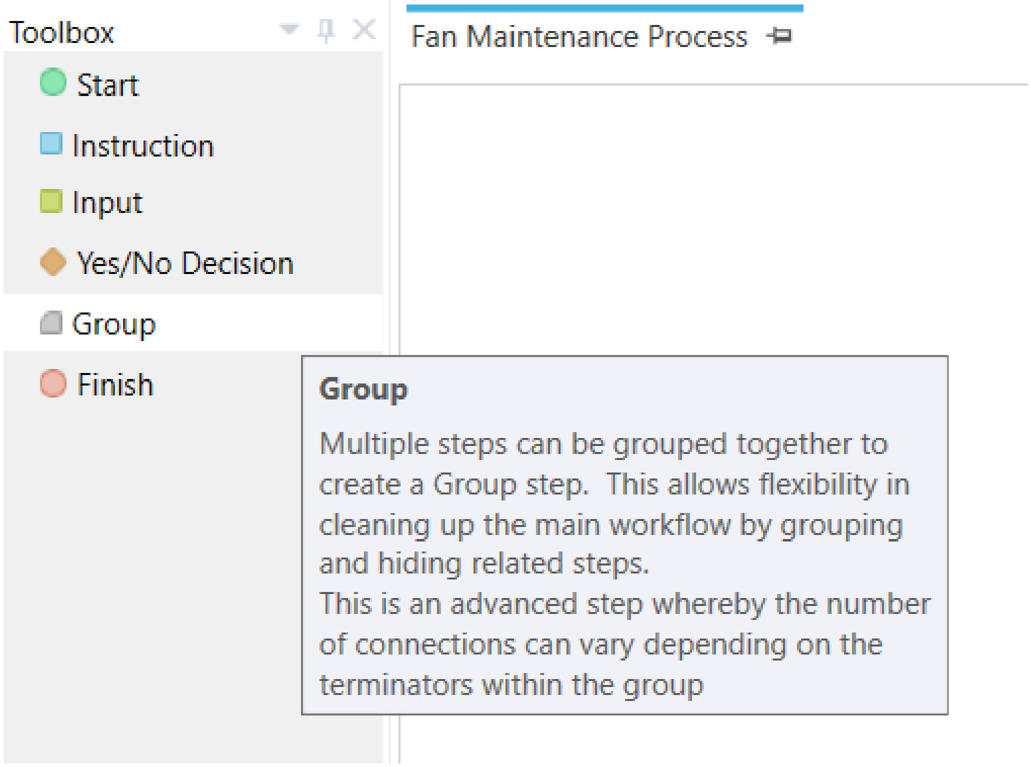
The Properties window (right-hand side) contains tabs for defining workflow and step properties and the Navigator showing more detail about the selected step (along with the steps it is connected to). Below that is the Errors and Warnings tab where any errors/warnings related to the workflow creation are shown).

Top Tip - When editing and updating an existing workflow, to ensure the most up-to-date template is used, download the template from the Admin Panel and remember to change the version number before publishing.

ADDING A STEP

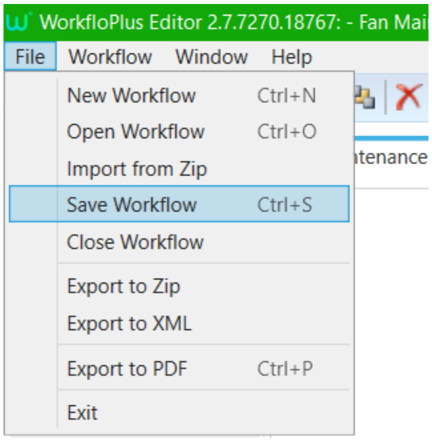
Steps are the building blocks of workflows. Each step is part of the process, inspection or work that the user is required to carry out. There are multiple-step types, which enable different actions to be carried out in a workflow. For example, a step could be in the form of some written/visual information (Instruction Step), the requesting of information (Input Step), or take the User down a different path, depending on the answer given (Decision Step).

From the Toolbox, drag and drop the required step type into the active workflow. You can hover over a step in the Toolbox for additional information about the step type.



SAVING YOUR WORKFLOW

We would suggest that you regularly save your workflow, even if not ready for publication. To save, navigate to File Menu and select Save Workflow, or use the Shortcut Menu (floppy disk icon). The first time you create a new workflow, a local directory will be created for saving the workflow template (For example C:\Users\[pc username]\Documents\My Workflows).



Once you have completed your workflow, this will need to be saved as a zip file ready for publishing.

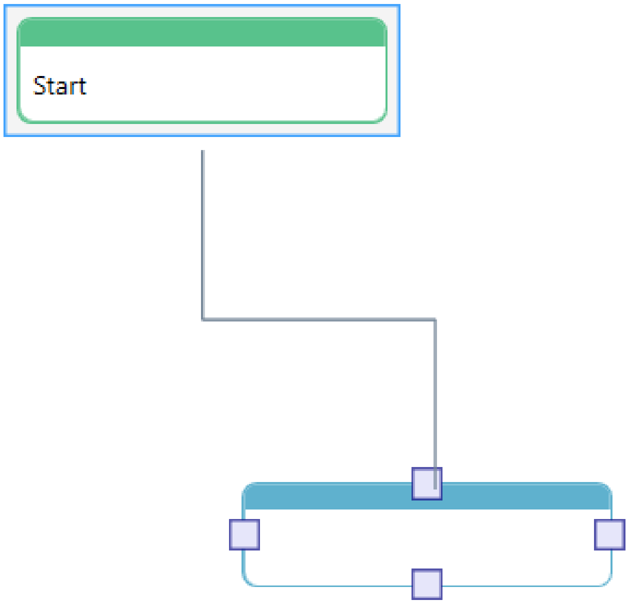
CONNECTING STEPS

Workflow steps are connected through drag-and-drop arrows, showing the direction the user is taken through in the workflow.

To connect the steps and create a complete workflow, hover over the step you wish to connect (4 small squares will appear). Move the cursor over one of the squares and a black plus sign will appear. Click the mouse, hold down, drag away from the box and a line will appear.

Drag the line to the step you wish to connect, move over the step and again the 4 boxes will appear. Hover over a box and release the mouse button to connect the step.

Repeat this task to connect each step, or in the case of a Decision Step the number of arrows needed will depend on the number of outcomes possible (minimum two). If an Input Step has a Fail Path, this step will need to have two arrows. The Fail Path must be labeled as 'No'.



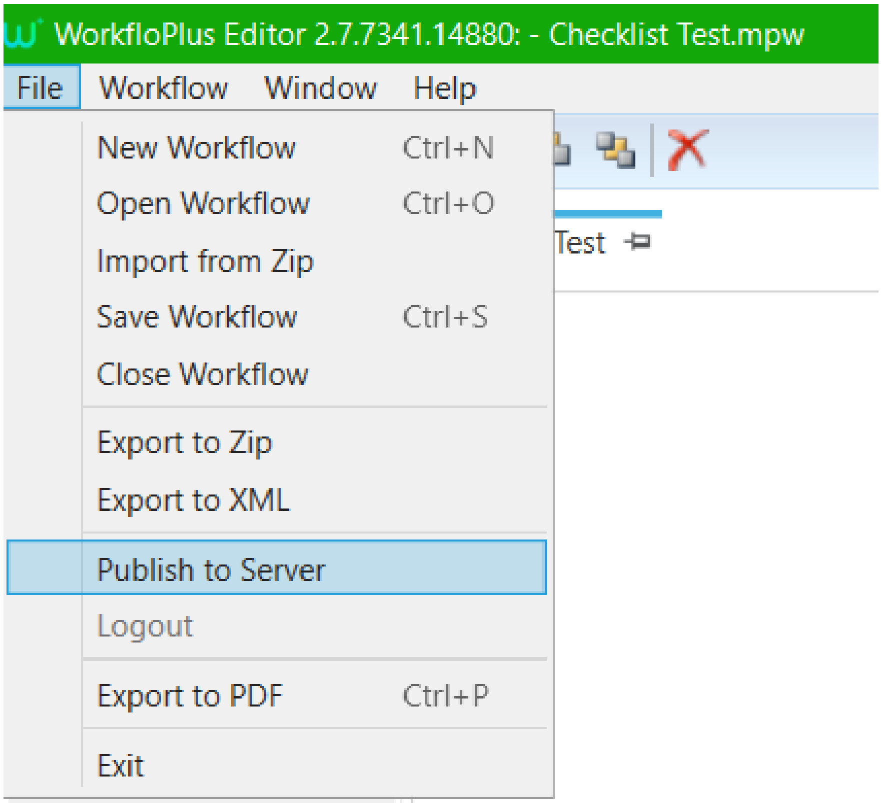
Ensure your workflow is fully connected by using the validation tool. Click on the Validate button in the Editor to check your workflow is complete at any time.

PUBLISHING YOUR WORKFLOW

There are two ways to publish your workflow to the server, one in the editor itself and one uploading zip files to the server dashboard.

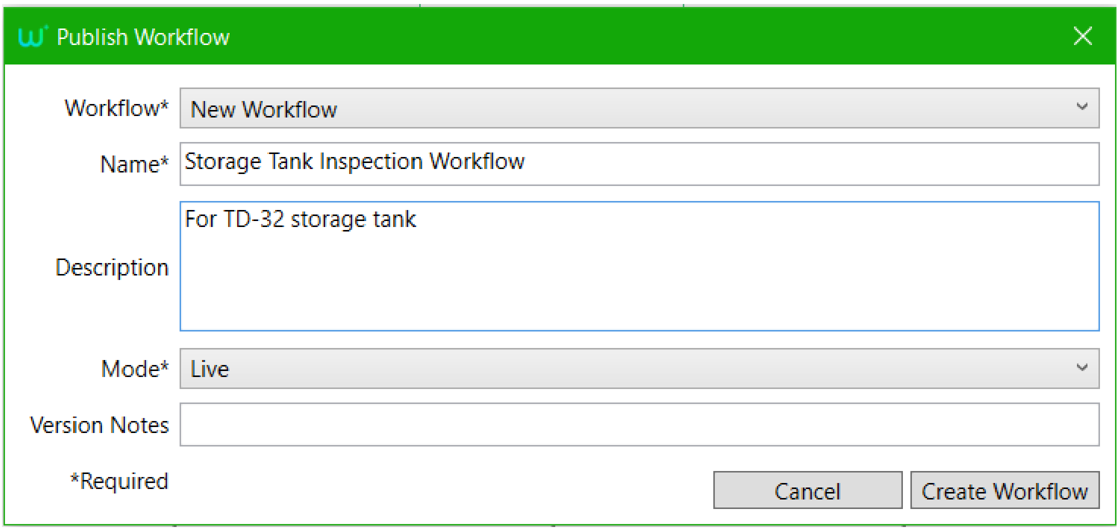
You will only be allowed to publish a workflow if you have the required permissions as set by your Onsight Flow Administrator. See Uploading a Workflow for more information.

To publish a workflow in the editor click the Publish to Server option in the File menu.



This will bring up a window with the server being published to. Only change this if you are running a local server or a custom URL. If you do change this then it can be reset back to the Onsight Flow default with the option in the corner.

Sign in as you would to the dashboard in order to bring up the workflow details screen.



If you would like to make this workflow an update to a workflow already on the server then select the original workflow in the Workflow dropdown. Other details will automatically be pre-populated with the server's details which can be edited before publishing.

Pressing Create/Publish Workflow will finish the process.

To publish a workflow login to the Onsight Flow dashboard select Workflows and in the View Workflows Panel Select Add Workflow button (+) which will open the New Workflow Panel.

In the New Workflow Panel, select the + icon to upload your .zip file from your local folder. When the upload is successful select Create Workflow to publish the workflow.

Once the upload is complete the workflow will appear in the View Workflows panel. A cancel option will be displayed to abort the upload if required.

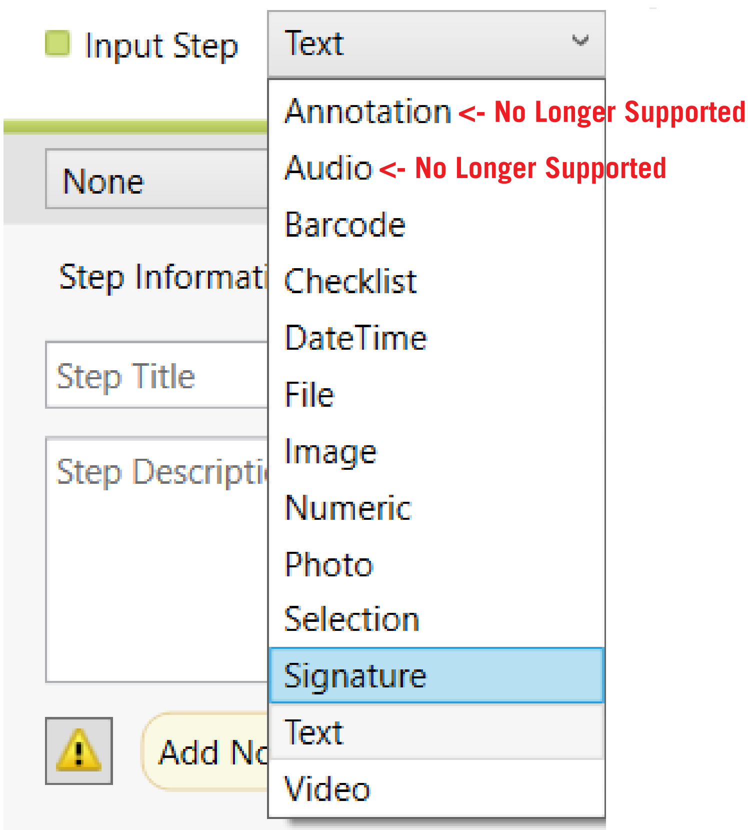
USING DIFFERENT STEP TYPES

There are 4 different step types; Instruction, Input, Decision, and Group.

Instruction Step: Gives the User detailed information about how a job/workflow should be carried out or operated.

Input Step: The User is tasked to enter information in the form of one of the following: Barcode, DateTime, File, Numeric, Photo, Selection, Signature, Text, Video.

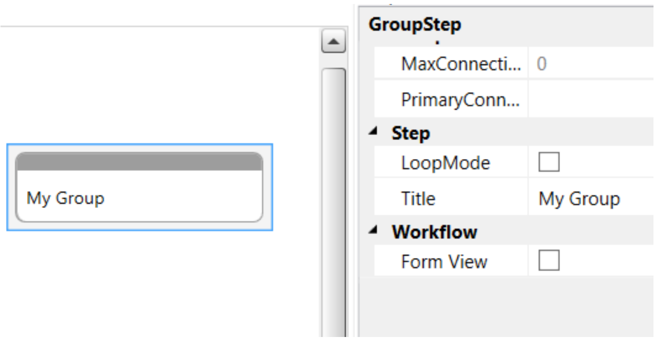
The input type can be defined using the drop-down at the top of the Step Editor Tab (default is Text).



Decision Step: This enables the user to go down one of two or more paths, depending on their answer. The default answers when editing a Decision Step are 'Yes' and 'No' but can be changed.

Group Step: For larger workflows, a Group Step can be used to break the workflow down into sub-sections (making it easier to manage and edit). There are no limits to the number of steps that can be added to a Group Step and a Group Step can contain additional Group Steps.

Group Steps also allow ‘Form View’ (whereby the user will see all steps in the Group on one page and can scroll up/down to answer them in any order, like on a form) and ‘Loop Mode’ (allowing a Form View set of questions to be answered as many times as required).



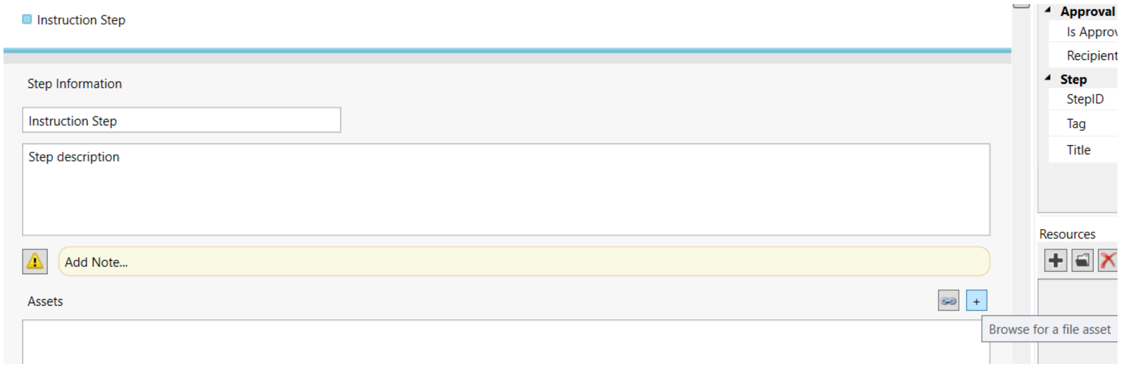
Three outcomes can be built into a Group Step, so the user's answers within the Group could lead to the workflow terminating, or to continuation or even loop them back to a previous question.

ADDING ASSETS AS A RESOURCE

An asset can be a file attached to a step.This can be a photo / video / document / audio file that user should have access to when completing a step in a workflow. For example, a user might need to see a schematic or a technical document when carrying out a task.

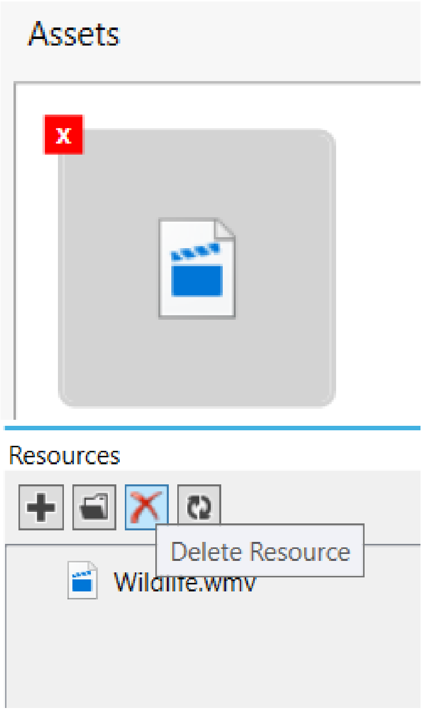
Assets are added via the Resources window in the Editor. Assets can only be added to Instruction, Input and Decision Steps.

Assets can be uploaded directly into the workflow by clicking the plus button in the Step Editor Tab, browsing for the required file, selecting the file and click Open (and they will then show in the Resources window for use on other steps) or by clicking the plus button in the Resources window and following the same process. The Resources window shows all the uploaded assets.



To attach an asset to a step, drag the drop it from Resources window to Assets Window in the Step Editor Tab.

To delete an asset from a step hover-over the asset in the Asset box and click on the red cross. Alternatively, to delete the asset from all steps, hover-over the asset in the Resources window and click on the red cross.



USING GROUPS

Group steps allow for the workflow to be broken down into sub-sections (more user-friendly when editing) and is where Form View and Loop Mode can be used.

Form View gives the User multiple steps on the same page (and can scroll up/down to answer the questions in any order they like).

Loop Mode enables the User to answer a form view set of questions an infinite number of times.

(Please note: Form View and Loop Mode can only contain Instruction and Input Steps).

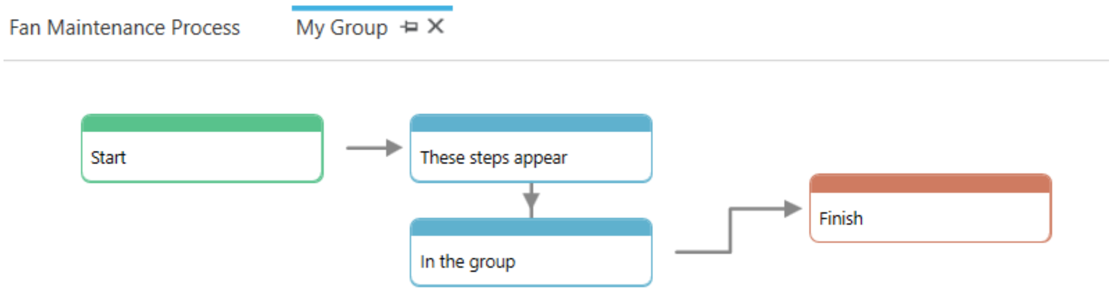
To create a group drag the group step from the toolbox and place it in the workflow. Double-clicking on the step will open the group tab.

Adding steps to this tab is the same as on the main workflow tab. In the properties tab of the group are options to change the name and set the group as a form or loop. By default steps in a group will appear as regular steps in the app unless these properties are changed.

Groups steps will begin with the step connected to the Start step and end with any step that connects to a Finish step.

document when carrying out a task.

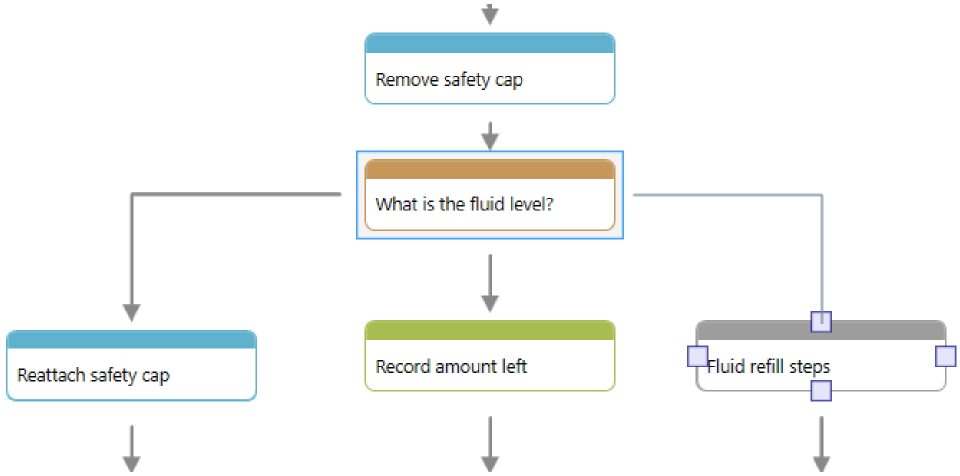
Assets are added via the Resources window in the Editor. Assets can only be added to Instruction, Input and Decision Steps.



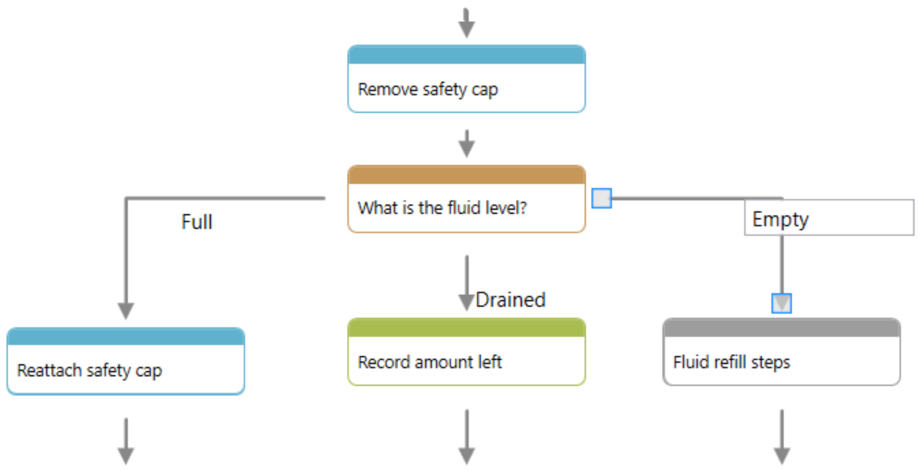
USING DECISION STEPS

A Decision Step will navigate the User to go down a defined path within the workflow, depending on their answer.

Version 2.7 and beyond of Onsight Flows support decision steps with multiple pathways. In order to add an option to a decision step first create the steps the pathways will lead to and connect them from the decision step. There is no limit to the number of pathways a decision step can have.

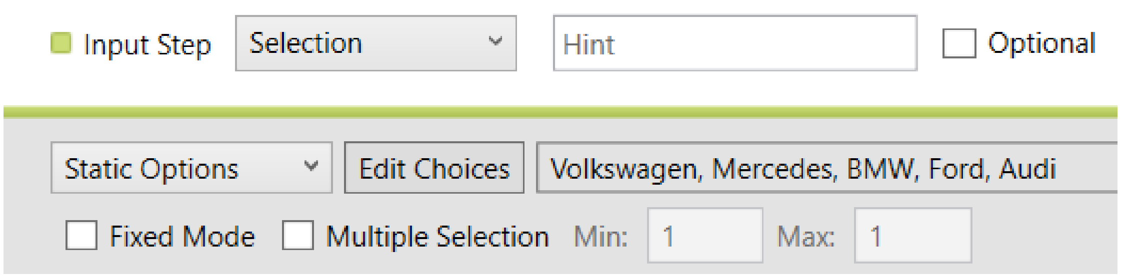


After this is done, connections can be selected, which will bring up the textbox where the options can be named.

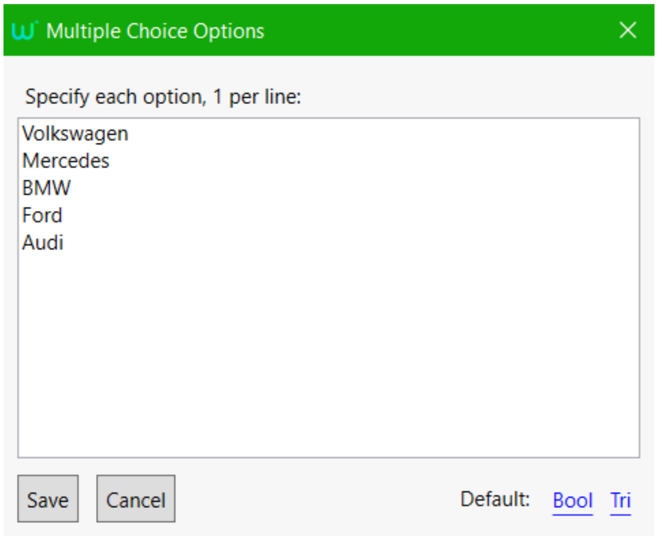


USING SELECTION STEPS

A Selection Step is created using the Input Step (using the drop-down at the top of the Step Editor Tab) and allows the user to select single or multiple answers from a predetermined list of options.



A Selection Step is created using the Input Step (using the drop-down at the top of the Step Editor Tab) and allows the user to select single or multiple answers from a predetermined list of options.



3. COMPLETING JOBS

STARTING A NEW JOB

Starting a new job on Onsight Flow is quick and easy. Open Onsight Flow on your Android or iOS app.

If this is the first time you have launched Onsight Flow on your device you will not see any jobs in your quick access bar or job history. To start your first job simply click on the plus icon from the home screen and select the workflow that you want to complete.

<<insert 2.7 device home screen image>>

If you're using the HMT-1 app then from the home screen say 'new job' and select the workflow that you wish to open.

If you have completed a job before on this device you will see a list of jobs in your quick access bar, Onsight Flow is intuitive and will list a number of frequent jobs to enable you to get to the job you want to complete quickly. Simply select the workflow from the list and select 'start' job.

If a job has been scheduled to start on a specific date and time this job will be available to start from your home screen. See scheduled jobs for more information.

<<insert 2.7 device home screen image with scheduled job on display>>

ADDING NOTES

When using a mobile phone to record a job using Onsight Flow, on each step, there is the option to add a note for that step. This is designed to capture any additional information relating to the task the user is completing, or to raise an issue or follow up work.

To access Notes, select the side menu and then select Notes to open the screen.

To start adding a note, tap the screen to activate the keyboard then write your note. When it is complete, select the tick to confirm and save the entry.

To view a note added to a step in Onsight Flow, on the step you wish to check, you also select the side menu and then Notes.

The notes you have added can also be viewed using the Onsight Flow Dashboard. On the Dashboard, select Jobs. Find the relevant job from the list presented and select it to open a page that includes a record of each step. Select the step you wish to view to open a further page and, if notes were added to that step, they will be shown in the Notes field.

The Notes facility is not available when using a Realwear HMT device.

SCANNING QR CODES

Onsight Flow includes the ability to begin a new job based on a workflow by scanning a QR code. This enables companies to place QR codes on equipment, certain locations, or in other places as it relates to specific tasks. The user can simply scan a QR code to automatically download the correct job and start the work instruction or inspection.

Note: you will need access to the workflow to be able to successfully scan and access the job.

When using Onsight Flow on a mobile phone, on the Jobs screen, select the QR link, which will open your phone's camera.

Using the camera, scan your QR code. When the image is recognised, the Job Details page will open. On this page, select Start Job.

To view a QR code using an HMT, on the Onsight Flow home screen, give the instruction "Scan Code" to open your HMT's camera.

Using the camera, scan the QR code. When the image is recognised, the Job Details page will open. On this page, give the instruction "Start Job."

When using mobile phones or a Realwear HMT, you may have to select Download Job before Start Job becomes available to you.

DOWNLOADING REPORTS

When using a mobile device or a Realwear HMT, the user can download a report relating to any completed job either at the end of the job or in the Job History section of the app.

When using a mobile phone, there are two ways in which a job report may be accessed.

Firstly, when you confirm the last step of a job, you are presented with the Job Complete screen. That screen has a menu link that includes View Report. When selected, a PDF report for your job opens. The default report displays a summary of the job, including the job name, your user name, the date, and job status. Beneath the summary, each step is listed. For each step, the details include the step name, duration, description and, if appropriate, your decisions, inputs and step notes.

On the Onsight Flow History screen, you can view reports for completed and abandoned jobs. Select the relevant job from the list of your jobs to open the Job Details screen, then select View Report to open a PDF of your report.

When using an HMT, there is a "View Report" option on the screen confirming that your job is complete. This opens a PDF of the report, which is similar in content to that described earlier in this section. If it is not clearly legible, different zoom levels may be selected.

Reports are also available in Job History. From the Onsight Flow home screen, select Job History then select the job you wish to view. Selection can be made using the job name or its item number. "View Report" will open the report PDF.

Onsight Flow Dashboard to view a job report. See Using Your Data/Downloading Job Reports.

BARCODE SCANNER

The History page consists of completed and abandoned jobs. You can view your last 20 jobs in chronological order, most recent first. You can select a job to view job details, report or restart it.

If auto-download is not enabled in Server Team Settings then you need to manually download the job to get Restart-Job option.

SYNCING DATA

The History page consists of completed and abandoned jobs. You can view your last 20 jobs in chronological order, most recent first. You can select a job to view job details, report or restart it.

If auto-download is not enabled in Server Team Settings then you need to manually download the job to get Restart-Job option.

HOW TO ENABLE AND USE TEXT-TO-SPEECH

Onsight Flow enables you to activate a text-to-speech (TTS) mode. When this is active, your client device will read out step titles and descriptions as you progress through a job. This is useful if you want to minimise the amount of time you need to look at your screen.

The options to enable text-to-speech for step titles and descriptions are available while a job is in progress. On mobile, this option can be found in the same in-job menu as the step notes. Selecting the option again will turn it off. On HMT, this option can be enabled by saying 'Speech On' and disabled by saying 'Speech Off'.

This setting is off by default but if turned on it will remain active until you turn it off. This means if you enable it and close the app it will still be active when the app is reopened.

VOICE COMMANDS

Onsight Flow enables you to activate a text-to-speech (TTS) mode. When this is active, your client device will read out step titles and descriptions as you progress through a job. This is useful if you want to minimise the amount of time you need to look at your screen.

The options to enable text-to-speech for step titles and descriptions are available while a job is in progress. On mobile, this option can be found in the same in-job menu as the step notes. Selecting the option again will turn it off. On HMT, this option can be enabled by saying 'Speech On' and disabled by saying 'Speech Off'.

This setting is off by default but if turned on it will remain active until you turn it off. This means if you enable it and close the app it will still be active when the app is reopened.

4. MANAGING YOUR ACCOUNT

LOGGING IN

MOBILE PHONE

When you start up the app for the first time (or if you've logged out), you will be asked to log in. Below are instructions for logging in on both a cloud and local server.

Firstly, you will need to enter your Team Name. Your Team Name will be provided to you by your Onsight Flow administrator. For local servers, your Team Name will be the local server URL and port number.

You will then need to log in using your credentials or another login option. To log in with a username and password, enter your credentials and sign in. Depending on your team settings, you may also be able to sign in using your Google or Microsoft Active Directory credentials (if enabled, you will see a button for each).

<<insert 2.7 device logging in page>>

HMT-1

When you start up the app for the first time (or if you've logged out), you will be asked to log in. Below are instructions for logging in on both a cloud and local server.

To simplify the sign-in process, you can generate a sign-in code for the HMT-1 on the Dashboard. Sign in, then at the top-right click **GO TO DASHBOARD**. Click the pull-down menu at the top-right and select **Device Login**. Enter this code on your HMT-1 to sign in.

DASHBOARD

To access the Onsight Flow Admin Dashboard from your browser (supported browsers: Google Chrome, Microsoft Edge, Internet Explorer v11+ and Firefox) go to **https://dashboard.flow.librestream.com/workflows.**

Here you can enter your team name, user name and password which will be set by your system administrator.

LOGGING OUT

MOBILE PHONE AND HMT

You can sign out from the settings page. Select sign out. If there are pending sync items you are warned about it and given an option to cancel or proceed with sign-out. If there are no items pending sync then you will be signed out of the app.

It's also possible that you will be automatically signed out of the app after a specified time limit. Please refer to the Team Settings section for more information.

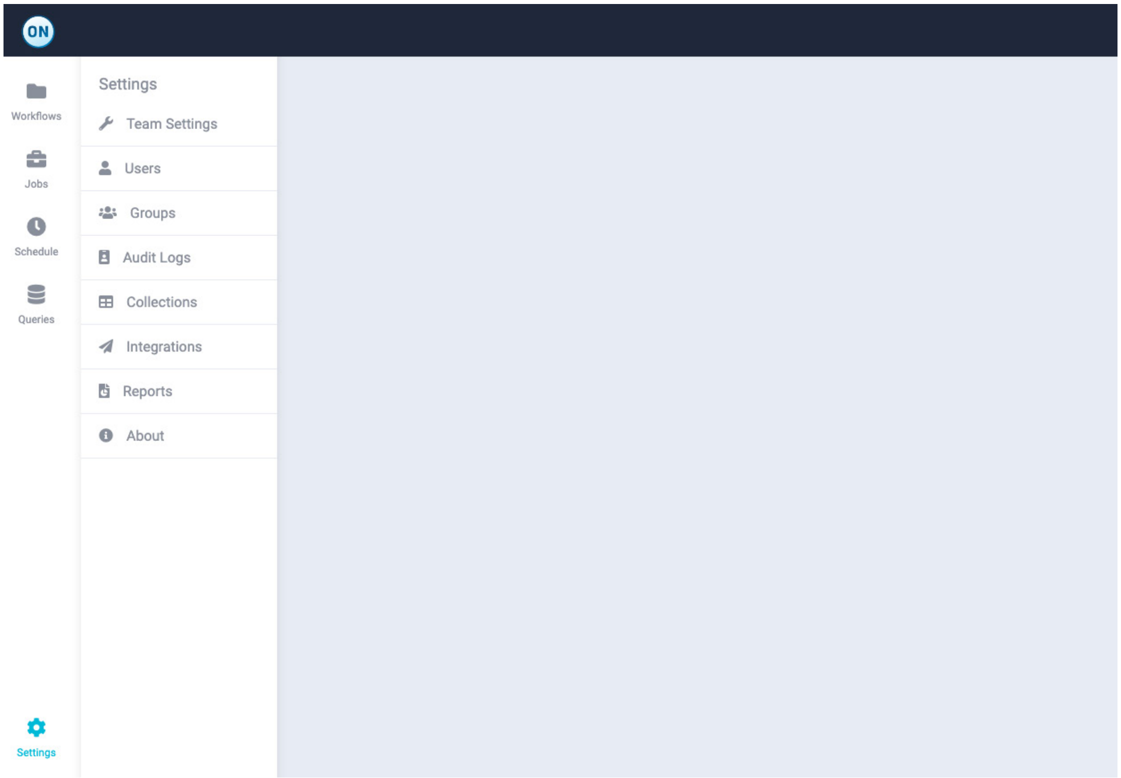
DASHBOARD

Cloud and Local Server: To sign out of the server, select the burger menu in Dashboard and Select Sign out. You will be signed out and taken back to the Team Name page.

MANAGING YOUR TEAM SETTINGS

MANAGEMENT SETTINGS

To manage your account select the cog on the dashboard side menu.



Here you can access and update all of your settings for your team including adding and removing users, updating your team settings, create groups, view your system audit logs, create and manage your integrations and upload collections.

CHANGING YOUR PASSWORD

You can change your password on the Onsight Flow Dashboard's My Account page (your user initials in the top right corner of the page).

On the My Account page, choose Change Password to open the Set Password screen where you will see guidance on the password requirements.

Assuming you know your current password, you are able to specify a new password, which is input twice. Selecting Set Password will confirm the update.

If the new password inputs do not match, you will see a warning after selecting Set Password. There are also warnings if the old password is incorrect or if the new password does not match the criteria given in the guidance notes.

If you are logging in for the first time using the system-generated password, it is recommended that you change your password to something secure and memorable.

USER MANAGEMENT

The user management options are available in the dashboard settings menu.

In order to add a new user select the "+" icon, this will open a window where you can add the user name, email address and set permissions for a user (see below for a list of permissions and their rights).

You can create a user in two ways. The first is "User With Password", which will automatically generate an initial password for the user. The second is "User With 3rd Party", which will allow the user to sign in using a 3rd-party provider such as Google or Microsoft (dependent on server settings). If a third party is used then the new user must use an account with the same email address as entered.

You can also assign user permissions to your users dependant on the access level you require them to have.

Please see details of user permissions below:

- Administrators are able to see all jobs, users and workflow templates (only owners can give admin permissions)
- Data Viewers are able to see all jobs and are able to delete or create jobs if they had other permissions (modifier and executor respectively)
- Editors can manage workflows
- Modifiers are able to edit data on the server and delete jobs
- Removing the user's job execution rights

Approvers are able to manage the approval of workflows that are in the Draft or For Approval state

You can also lock a users account to prevent unauthorised access, this action does not delete the user and the account can be unlocked at a later date.

To delete a user, navigate to the user you wish to delete and select delete user at the bottom of the user panel, this action is irreversible and the user will be permanently deleted from the system.

Please note that you are unable to edit your own user settings.

User audit logs can be found in a separate section on the settings page. Here you can view any activity related by a user in detail.

Both the audit logs and user lists can be filtered using the search icon.

GROUP MANAGEMENT

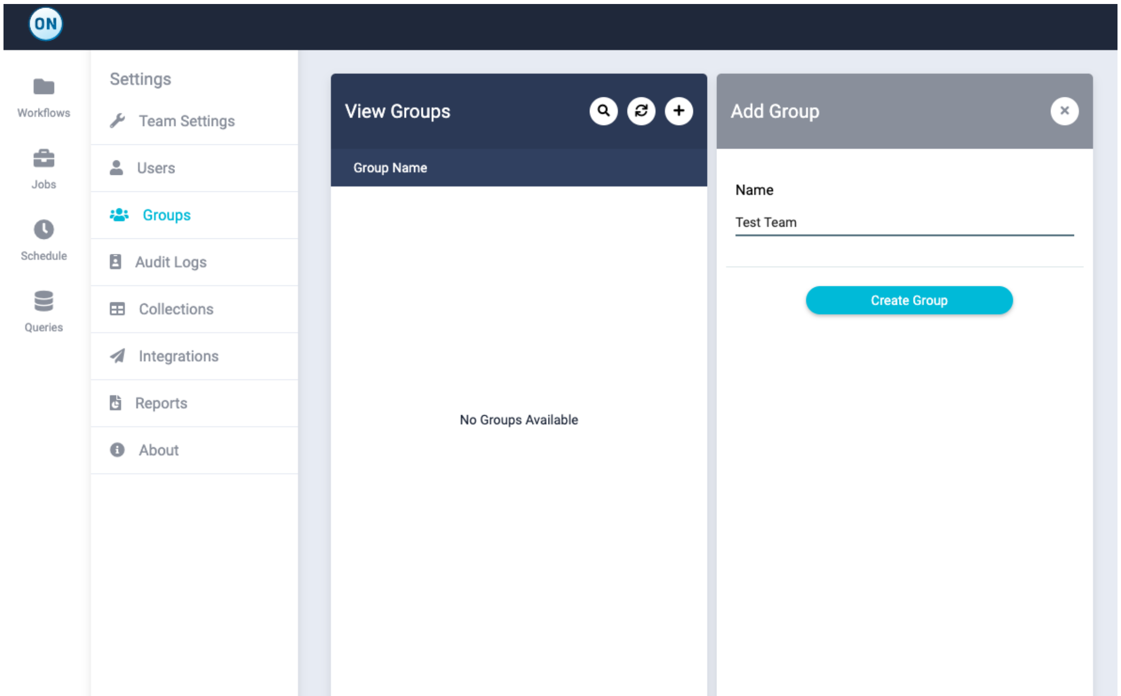
The facilities to create and manage groups and permissions are available on the Onsight Flow Dashboard for users that have Administrator access.

The functionality for Groups is accessed using the Settings icon then Groups to open the View Groups window.

CREATING A GROUP

In the View Groups window, select the "+" icon to open the Add Group window.

After giving the group a name, select Create Group. The Add Group window will close and your newly created group will be listed in the View Groups window.

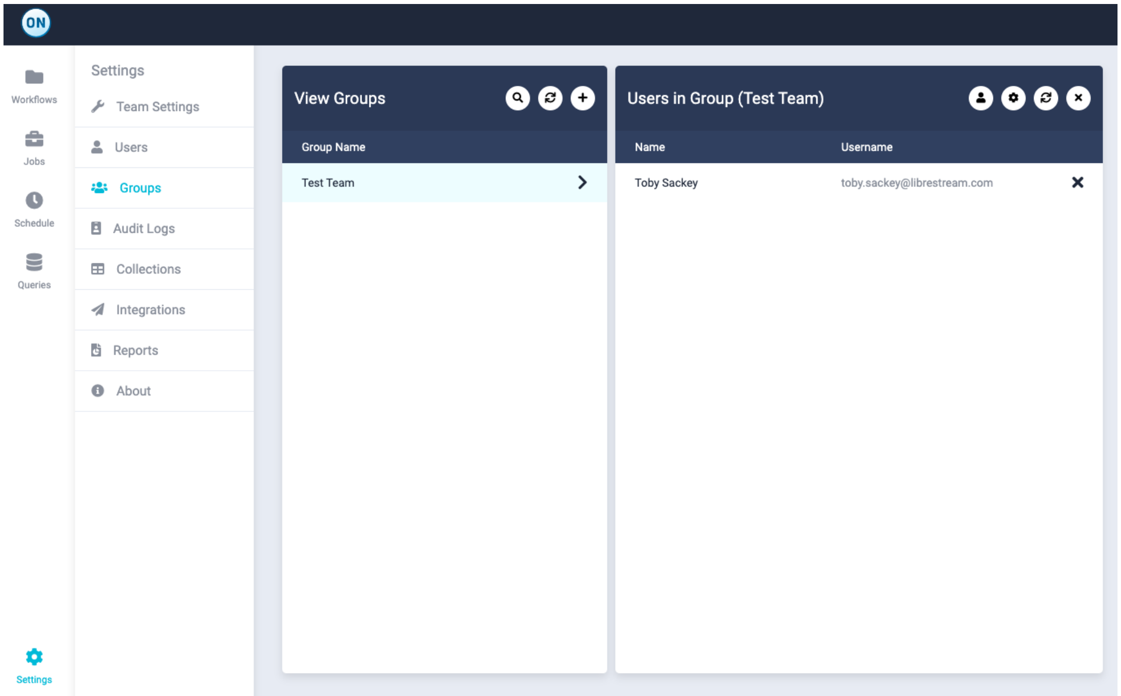


MANAGING A GROUP

From View Groups, select the group you wish to manage, which may be your new group or an existing group. This will open a window titled Users in Group, with the group name given in brackets.

To add, amend or delete users, choose the Modify Users icon. Modify Users will open a list of active users that you may wish to include in the group. You may have to navigate through several pages but there is a search facility available.

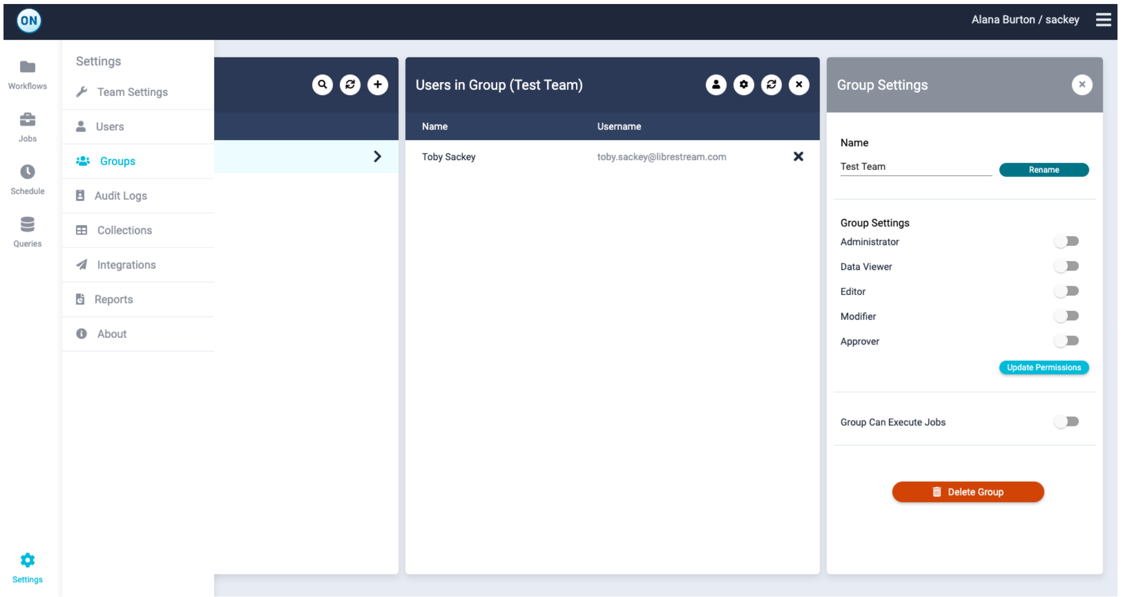
Choose the users you want in your group by selecting the box alongside each name. Your selections are indicated with a tick. Unticking removes users. When your list of users is correct, go to Confirm to save the group.



The Users in Group window also allows you to remove users by clicking on the "X" found alongside each user listed.

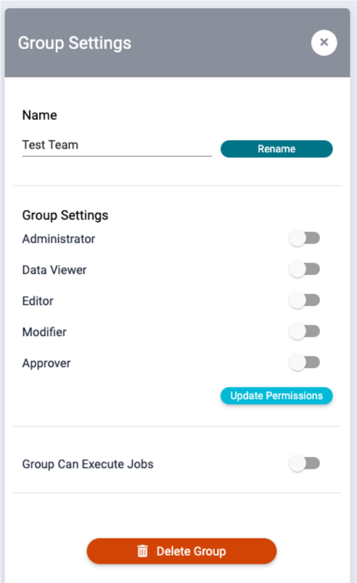
Through selecting an individual user on the Users in the Group window, you can access User Details. The functionality available on the User Details window is similar to that described in the "User Management (Understanding and setting users, permissions and viewing audit logs)" section.

From the Users in the Group window, you can specify settings for the group. Select the Settings icon to access Group Settings.



These give you the option to rename the group and set permissions. The permissions are Administrator, Data Viewer, Editor, Modifier and Approver. For permission descriptions see "User Management (Understanding and setting users, permissions and viewing audit logs)."

Select those that are appropriate for the group then select Update Permissions to save them.



There is also a slider to allow you to specify whether the group can execute jobs using Onsight Flow. This is automatically updated when the current selection is altered.

To Delete a group, use the Delete Group button on the Group Settings window.

TEAM SETTINGS

Team Settings are settings that affect every user on your team.

To access Team Settings, on the Onsight Flow Dashboard, select the Settings cog then Team Settings. The Team Settings window contains a series of settings used to configure Onsight Flow. These are described below.

Default Time Zone

You can now set the default time zone settings for your admin dashboard, reports and emails. To do this, navigate to the settings and then team settings.

Select the default timezone that you would like your reports and emails to display. Once selected this will update automatically.

Prevent Workflow Rollback

When you want to disable re-activating any previous version of any workflow enable the Prevent Workflow Rollback in Team Settings. This option disables the "Activate Workflow" button in Workflow Version Details Panel. This would be helpful if you want to make sure only newer versions of workflow are used.

Allow Job Naming

When you start a job in the Onsight Flow client app it autosaves the workflow name as a job name.

If you would prefer to give your job a custom name, enable Allow Job Renaming in Team Settings.

Require Abandon Reason

If set to yes, when you abandon a job in the Onsight Flow client app, you will need to give a reason. If set to no, a reason is not required.

Disable Job Restart

If you want to disable the option to restart the same job after completion or from the Job History page and want to go to the new job page to start any job, enable Disable Job Restart in Team Settings.

Require Reason on Data Edit

If set to yes, in Onsight Flow, if you go back to a previous step and alter the current entry when you move to the next step you will be asked to give a reason before confirming your edits.

Auto Device Sign Out

When you want to set the automatic sign out of the client app, enable Auto Device Sign Out in Team Settings. You can specify the inactive time to elapse before an automatic sign out in minutes, starting from 30 minutes. Leaving the time blank or setting it to 0 will keep you signed in until the token expires. You are reminded five minutes before the automatic sign out.

Please Note: In order to protect data, whenever a device is syncing auto device sign out will not be enforced.

Auto Download Workflows

When you want to automatically download all your workflows after signing in, enable Force Download of Workflow Updates. Note that any workflows that are greater than 100 Mb still need to be manually downloaded.

Workflow Update Lapsed Time

If this is switched on, this enables you to specify a time period during which Onsight Flow will not check for any workflow version updates. You will continue to use the last downloaded version. This option has a set of predefined values that can be set. The app will check for updates when the time specified is reached.