# ONSIGHT FLOW GUIDE

## Reporting & Data Integration

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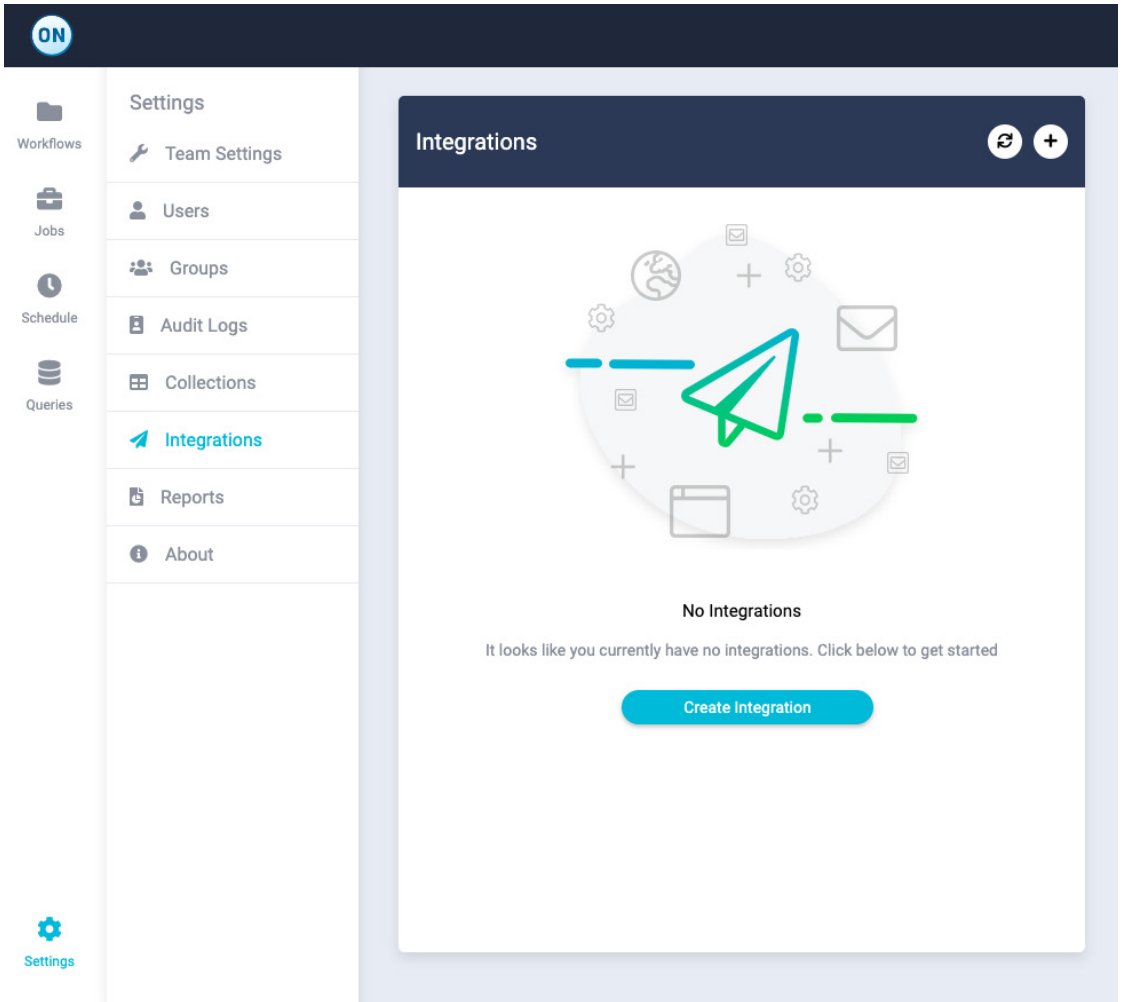
## INTEGRATIONS

**Integrations (formerly triggers)** can be configured to send data on to a downstream person(s) or application(s) when a job has been completed.

Onsight Flow offers two types of Integrations

1. **Email: Send an email containing details of a completed job to one or more email addresses**
2. **HTTP: Send a POST request that contains all of the job data to a designated endpoint**

View Integrations by selecting settings and then Integrations from the navigation panel. Once selected this will open up the integrations panel.




From this panel, you will be able to view the Integration 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 Integrations from this panel using the buttons in the view Integrations header.

To open the Integrations details panel, click on the Integration 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 Integration selected.

To create a new Integration select the plus icon in the view triggers panel header; this will open up the add trigger panel to the right.

## HTTP INTEGRATIONS

**HTTP integrations** allow you to specify a rule such that an endpoint is sent an HTTP POST request whenever a job is completed against a workflow that is associated with the integration; integrations of this type are commonly called webhooks.

To set integrations you must have either Owner, Administrator, or Editor permission.Start by navigating to the integrations settings by going to the Dashboard, then navigating to Settings, and clicking on the integrations button.

From this panel, you will be able to view the integrations 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.

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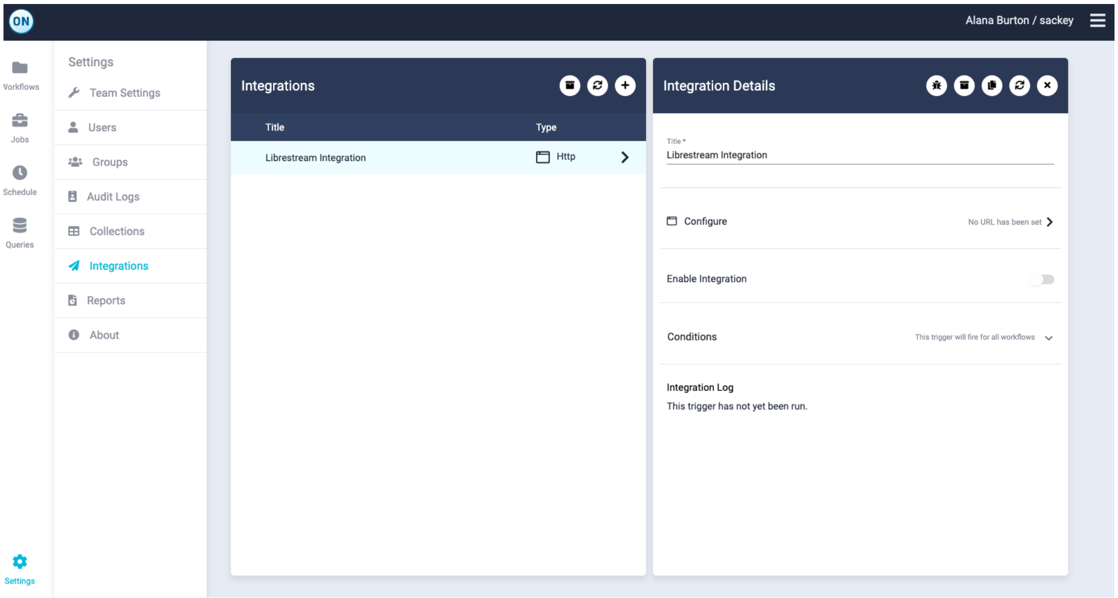
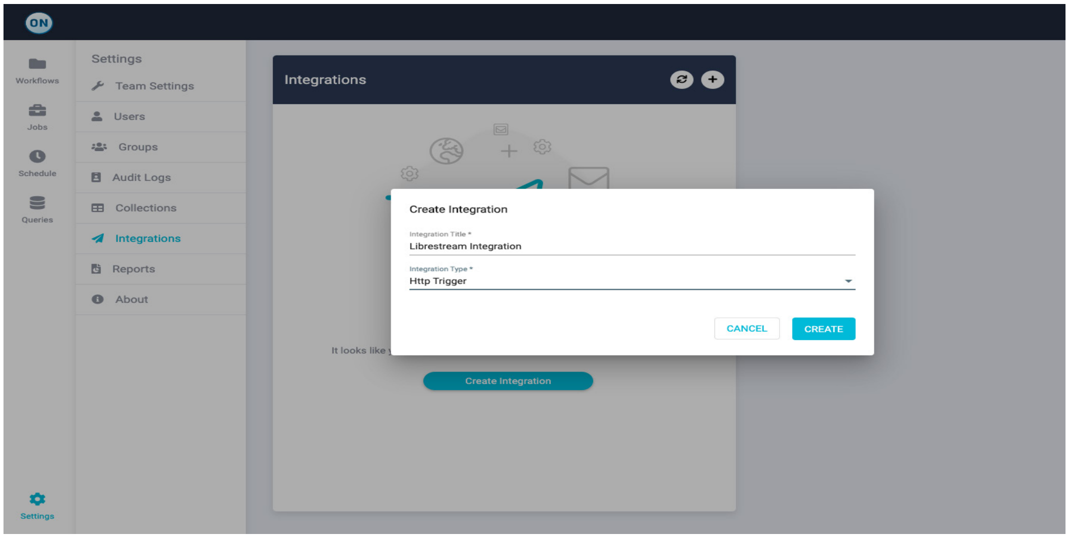



To create a new integration select the plus icon in the view integrations panel header; this will open up the Create Integration modal; into there enter the title for the integration and then select HTTP as the type.




Once you've entered the information, click on the Create button and the Integration Details panel will open up to the right.

## WEBHOOK INTEGRATION CONFIGURATION

To configure your HTTP integration, navigate to the integration panel, select the integration you want to configure. Here you will be able to enter the integration URL, your PDF requirement (whether you want to send the PDF immediately or wait 5 minutes), and finally which report template you want to use.

### REPORT SETTINGS

**In this section, you can set your PDF requirements**

- Don’t send PDF - Select this if you do not want to include a report as part of a integration email. In this case, an email is sent with the full JSON file.
- Include PDF - Including the PDF report will also include the full JSON file.
- Wait 5 minutes - The image/video thumbnails may be imperative to the report and therefore you can select this option to wait for all image/video thumbnails to sync up to the server before sending the report.

**For more information on creating a report template visit our reports section.**

## WORKFLOWS AND WORKFLOW TAGS FOR INTEGRATIONS

Finally, associate the integration with one or more workflows. By default an integration will fire for all workflows, however, if you want to associate the integration with specific workflows either specify them in the workflows for integration input field (look up from the list of all of your workflows) or enter one or more workflow tags in the workflow tags for the integration input field. If you enter one or more workflow tags, the system will look for any workflows with those tag(s) included, and the integration will fire for those workflows accordingly. For example, if you have workflows tagged with 'maintenance', you can fire this integration for all of those workflows without having to manually specify them as individual workflows.

## SAVING YOUR INTEGRATIONS

To save the integration settings, select Create integration, this will then show in your view integration panel.

## TESTING YOUR INTEGRATIONS

To test an email integration simply complete a job on one of the workflows associated with that integration; an email containing a summary body with a PDF report attached should be delivered to all recipients.

# EMAIL INTEGRATIONS

Onsight Flow lets you set up multiple job reports that can be run against completed jobs. The email integrations (formerly triggers) system allows you to send your reports to whoever needs them, with complete flexibility. For example, if you have a health & safety pre-inspection prior to commencing work, a report covering only these steps could be sent to the on-site safety inspector.

If you're doing an inspection of equipment and certain steps fail, you could pull out only the failed steps and send a report covering these to the maintenance manager. You can also send reports to groups of people.

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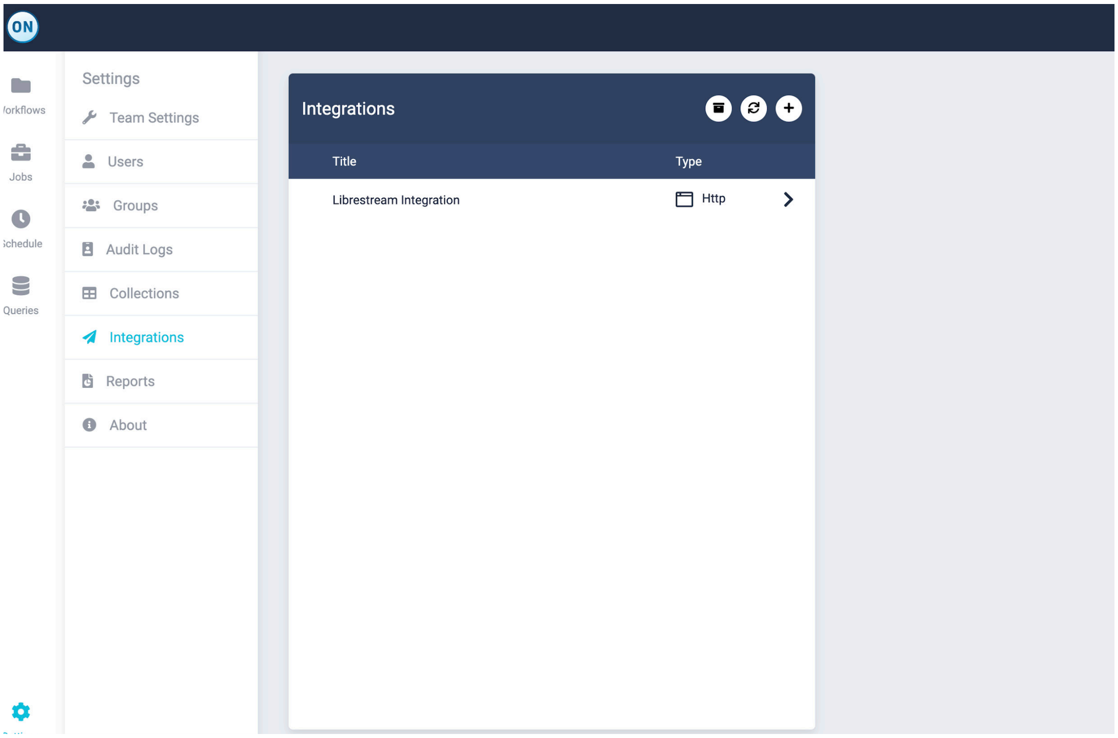

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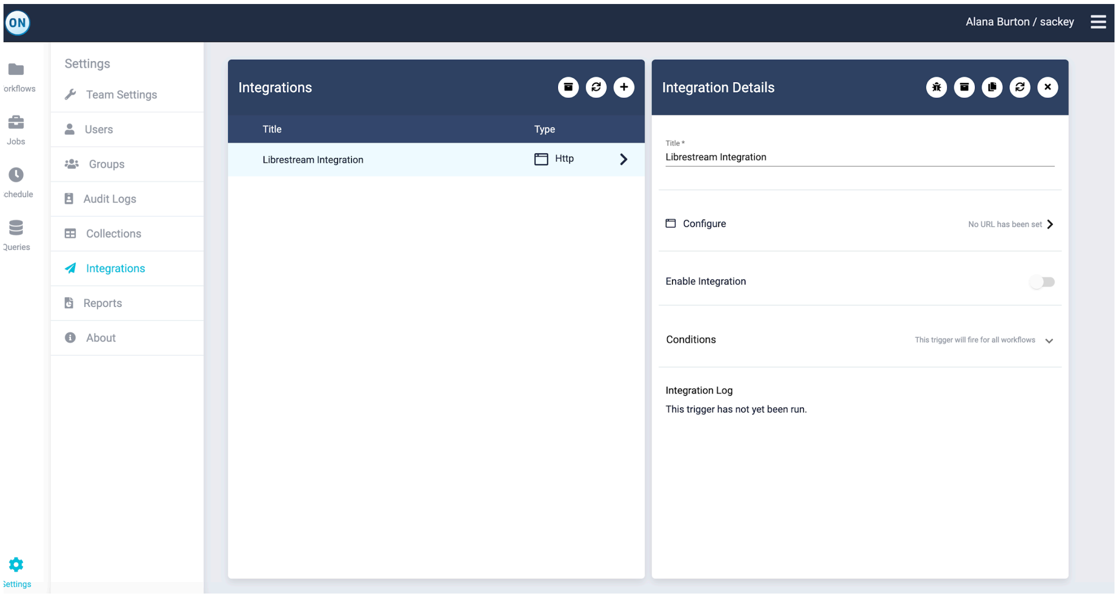


To create a new integration select the plus icon in the view integrations panel header; this will open up the add integration panel to the right.

To create an email integration; firstly name the integration and add a description, secondly select email as the type.