

# ONSIGHT HOW TO:

## ONSIGHT FLOW BUILDER

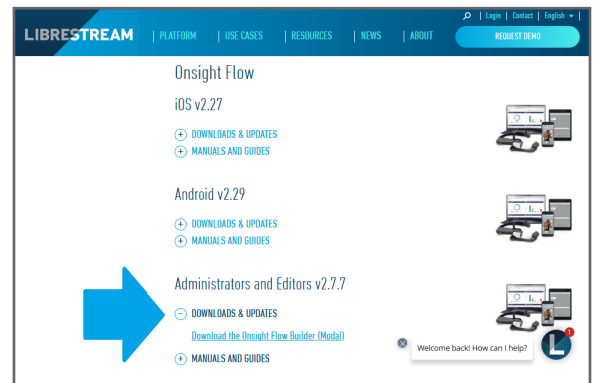
### Creating a Sample Workflow (Pump Inspection Workflow)

The **Onsight Flow Builder** is one of three components that includes the **Flow Admin** portal, and the **Client App** that makes up **Onsight Flow**. The builder is **Windows-based** and it enables you to create new or edit existing workflows.

**NOTE:** The intent of this how-to document is to provide step-by-step instructions for building a workflow. The example will include instructions for building and publishing a **Pump Inspection** workflow. This first page includes downloading the software and creating a blank template for this workflow. **The step-by-step instructions begin on the page 2.**

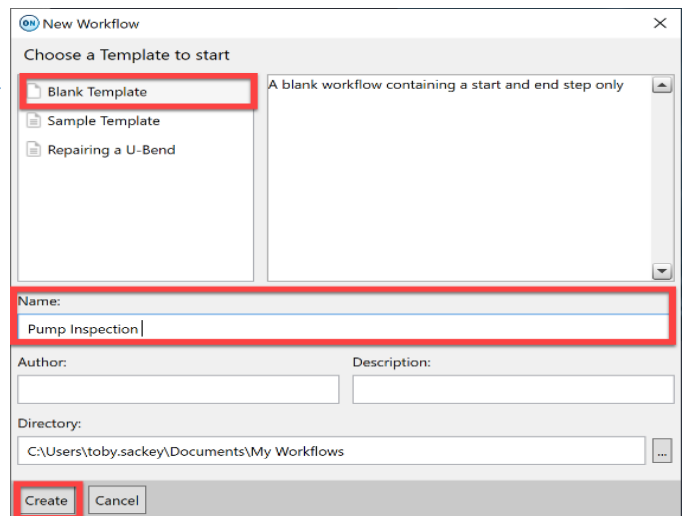
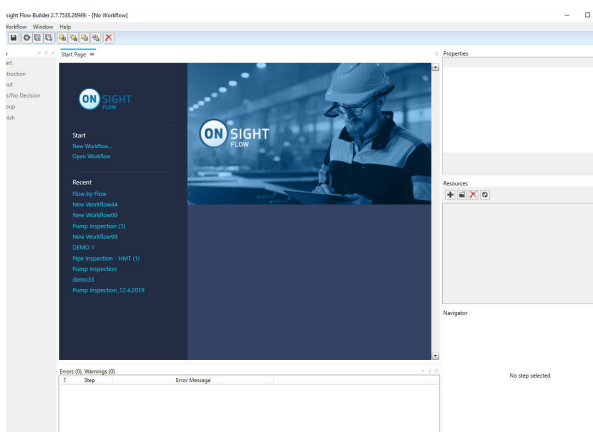
### DOWNLOAD THE SOFTWARE

Navigate to the [Librestream Support](#) page and scroll down to the **ONSIGHT FLOW** section. Locate and click the **Administrators and Editors** (Release/Version) and select **DOWNLOADS & UPDATES** followed by clicking the **Download the Onsight Flow Builder (Modal)** link. Run the installation program.



### PREPARING THE BUILD

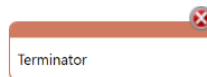
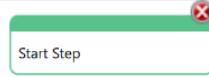
1. Launch Onsight Flow Builder and select the **New Workflow** icon. A New Workflow window will appear.



2. Select **Blank Template**.
3. Enter "**Pump Inspection**" within the in the **Name** field and click **Create**.

**NOTE:** All steps must be added to the canvas first.

- You will see the **Start** and **Terminator** steps appear on your canvas. Every workflow will include these two steps.

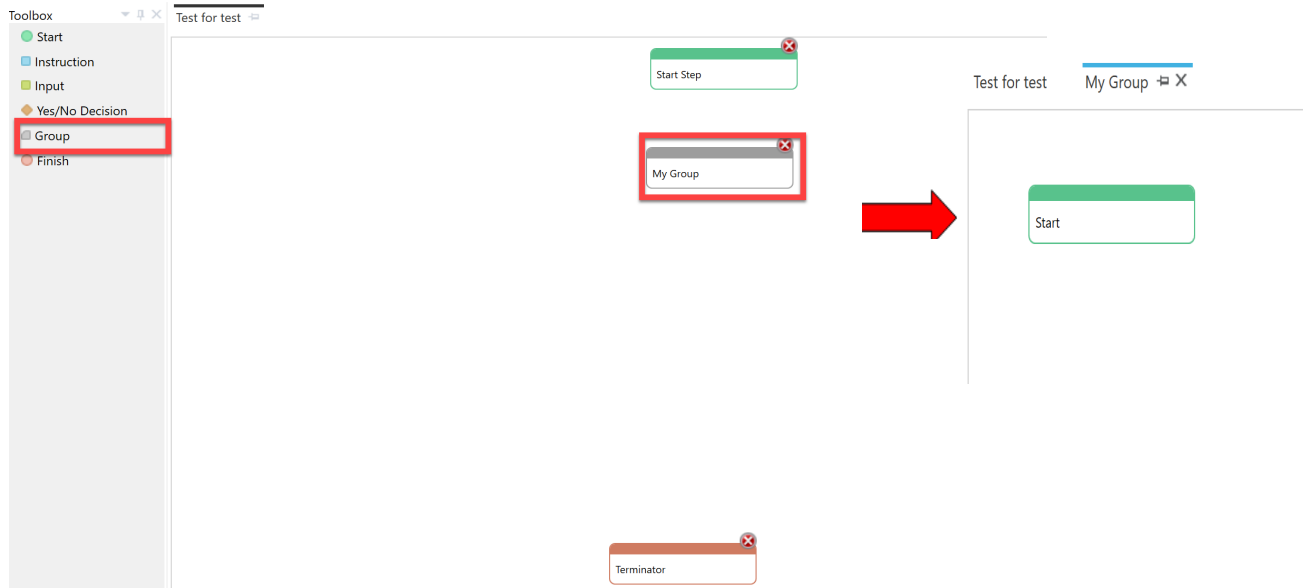


## STEP 1 GROUP STEP - PUMP INSPECTION INFORMATION

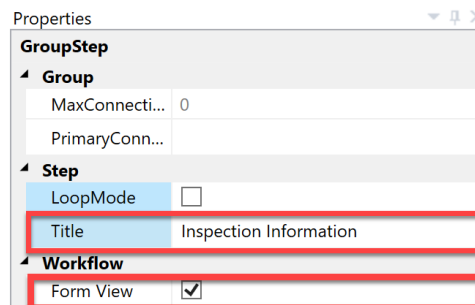
**NOTE:** Group Step is NOT Supported on an HMT Device).

The first step that must be added to the workflow is a Group Step. Group steps enable you to group steps together like a “mini” workflow. The Group Step also allows you to access **Form View**, which enables steps to appear in List View where they can all be completed on the same page.

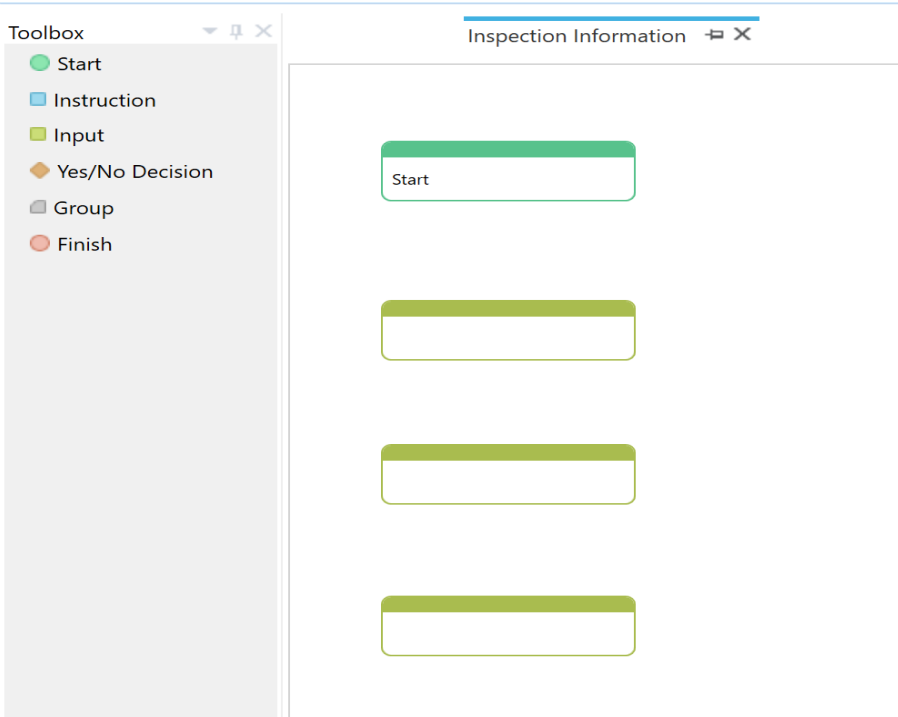
- Drag and drop a **Group Step** to the canvas and double-click **My Group** to edit. The group step opens as a new tab.



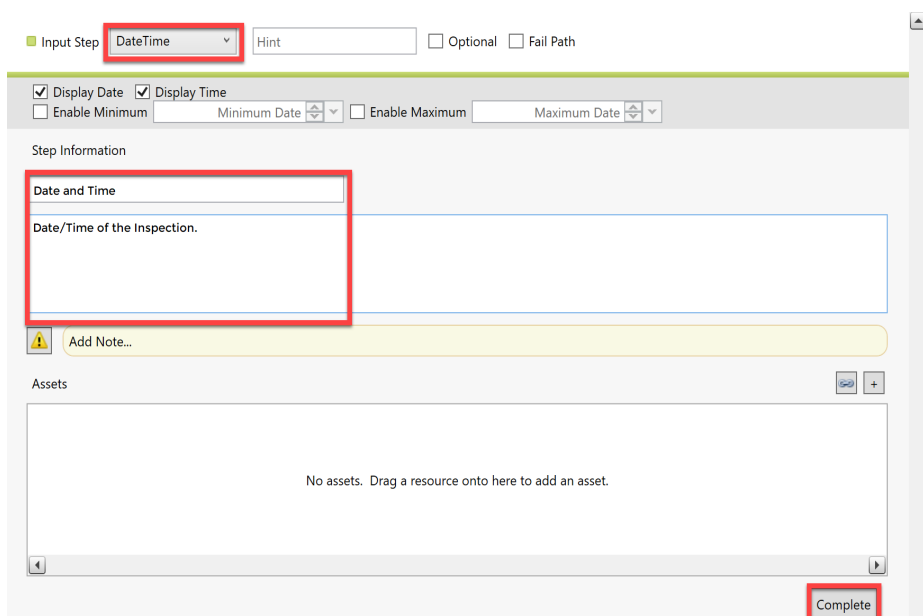
- Navigate to **Properties** on the right and enter “Inspection Information” within the **Title** field and enable the **Form View** check box.



- Next, drag and drop **three Input Steps** to the canvas (one at a time) and double-click to edit the first input step.



- An **Input Step** requires the user to enter information. In this example, it is the current **Date & Time**.
- Select **DateTime** from the drop-down menu and then enter the “Date and Time” within the **Title** field.
- Enter “Date/Time of the Inspection” within the **Description** field.
- Click **Complete** to finalize the step.



- When seen in the user App, the Date and Time will populate automatically but the user has the option to make changes, as necessary. The second **Input Step** is going to be for the **Department**.

9. Double-click the middle Input Step and choose **Selection** from the drop-down menu.
10. Select **Static Options** from the second drop-down menu.
11. Next, click **Edit Choices**. The **Multiple Choice Options** window appears. Add **Maintenance** and **Repair** as options for each line and click **Save**.
12. Verify that the **Fixed Mode** option is enabled. This will force the User to select from one of the two options.
13. Enter “Department” within the **Title** field.
14. Enter “Service department” within the **Description field** and select **Complete**.

Input Step: Selection | Hint: | Optional:  | Fail Path:

Static Options: Maintenance, Repair | Edit Choices | Save

Fixed Mode |  Multiple Selection | Min: 1 | Max: 1

Step Information

Title: Department

Description: Enter the department

Add Note...

Assets: No assets. Drag a resource onto here to add an asset.

Complete

15. Double-click the last **Input Step** in the **Group Step**. This step will prompt the User to scan an **Asset ID** using the Barcode input feature.
16. Select **Barcode** from the drop-down menu.
17. Enter “Asset ID” within the **Title** field.
18. Enter “Please capture or enter the pump asset ID” within the **Description field** and select **Complete**.

Input Step: Barcode | Hint: | Optional:  | Fail Path:

Linked Step Id: | Save

Step Information

Title: Asset ID

Description: Please capture or enter the pump asset ID

Add Note...

Assets: No assets. Drag a resource onto here to add an asset.

Complete

19. Drag and drop a **Finish Step** onto the canvas.

20. Click and drag a connector from the adorer (Node) of one step to the adorer (Node) of the next step in the **Group Step** sequence.

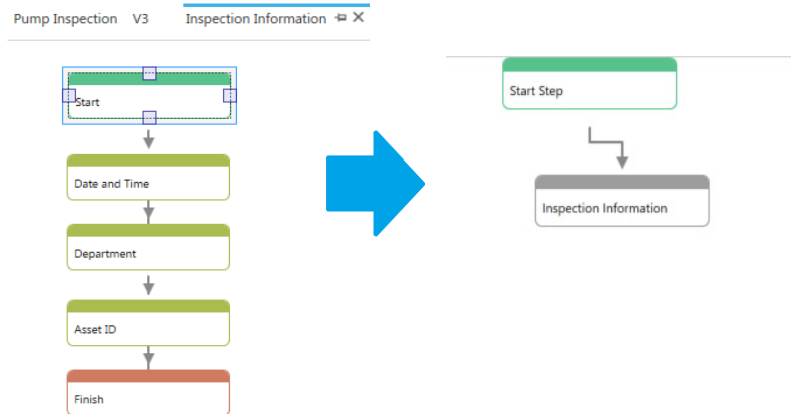
**TIP:** Adorners are the square nodes that appear at midpoints on the shape outline. Refer to the following figure.

21. Repeat for all steps within the **Group Step**.

22. Below are the steps in the **Group Step** with connecting lines.

23. Click the **X** next to the **Inspection Information** tab to close the **Group Step** to return to the main workflow.

24. Drag a connector from the **Start Step** to the **Inspection Group Step**.



**NOTE:** The Input steps of **Annotation**, **File** and **Audio** are not supported.

## STEP 2 YES/NO DECISION STEP - DO YOU HAVE THE REQUIRED TOOLS?

1. The next step will add a **Yes/No Decision Step**, which checks (Verifies) that the user has the required materials.
2. Drag and drop a **Yes/No Decision Step** onto the canvas beneath the **Inspection Information Step** and double-click to edit.
3. Enter “Do you have the required tools?” within the **Title** field.
4. Enter “Do you have the required tools to perform this inspection?” within the **Description** field and click **Complete**.

Step Information

Do you have the required tools?

Do you have the required tools to perform this inspection?

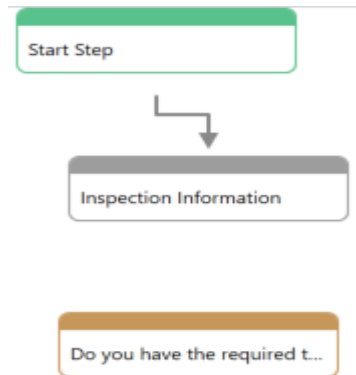
Add Note...

Assets

No assets. Drag a resource onto here to add an asset.

Complete

5. At this point, there is no need to connect **Group Step** with **Decision Step** in the main canvas yet.



### STEP 3 INSTRUCTION STEP - NO TOOLS

The next step accounts for if the user enters “No” for the previous **Decision Step**. This is going to be an **Instruction Step**.

1. Drag and drop an **Instruction Step** onto the canvas. Move it below and to the left of the **Yes/No Decision Step** and double-click to edit.
2. Enter “No Tools” within the **Title** field. Enter “Not having the correct tools will prevent the job from being done correctly and efficiently” within the **Description** field and select **Complete**.

Instruction Step

Step Information

No Tools

Not having the correct tools will prevent the job from being done correctly and efficiently.

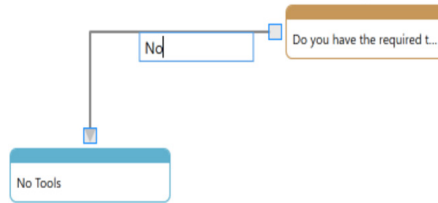
Add Note...

Assets

No assets. Drag a resource onto here to add an asset.

Complete

3. Drag a connector from the **Decision Step** (Node) to the **Instruction Step**. Double-click the connector and type “No” within the text field. Refer to the following figure.

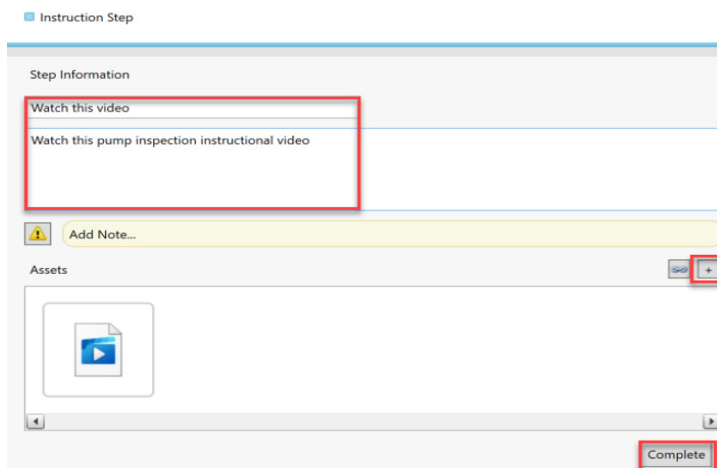


## STEP 4 INSTRUCTION STEP - WATCH THE VIDEO

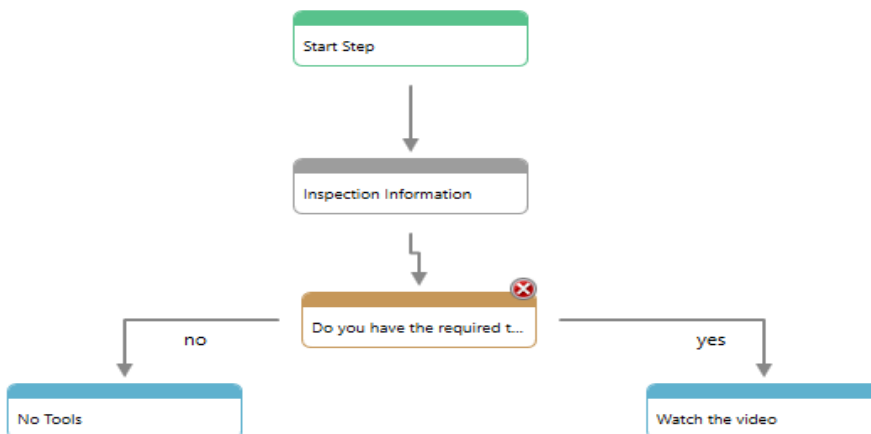
The next step accounts for if the user selected **Yes** for the previous **Yes/No Decision Step**.

1. Drag and drop an **Instruction Step** onto the canvas. Move it below and to the right of the **Yes/No Decision Step** and double-click to edit.
2. Enter “Watch this video” within the **Title** field. Enter “Watch this pump inspection instructional video” within the **Description** field.
3. Next you will add a video for the user to watch. Click the + (Plus) and select the video from the **Pump Inspection Resources** folder and click **Complete**.

**NOTE:** For this example, you can use any type of short video to demonstrate this step.



4. Drag a connector from the **Decision Step** to the **Instruction Step** and double-click the connector and type “Yes”.
5. Now you can connect the **Group Step** to the **Decision Step** on the main canvas. Refer to figure below.



## STEP 5 DECISION STEP - CAN YOU RETRIEVE THE TOOLS TODAY?

1. Next, drag and drop another **Yes/No Decision Step** onto the canvas. This step will be connected to the “**No Tools**” **Instruction Step** that was previously added to the workflow.
2. Double-click the **Yes/No Decision Step** to edit.
3. Enter “Can you retrieve the tools today?” within the **Title** field. Enter “Are you able to retrieve the tools required for this inspection today?” within the **Description** field and click **Complete**.

Decision Step

Step Information

Can you retrieve the tools today?

Are you able to retrieve the tools required for this inspection today?

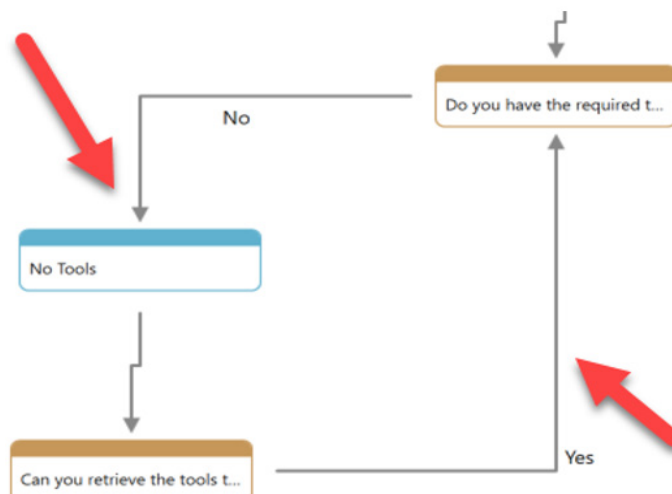
Add Note...

Assets

No assets. Drag a resource onto here to add an asset.

Complete

4. Drag a connector from the **Instruction Step** to the **Decision Step**. You will also need to connect this **Decision Step** to the *previous* **Decision Step** because this will be the **Yes** path.
5. Double-click the connector and type “Yes” within the text field.





## STEP 6 INSTRUCTION STEP - THE “NO” PATH

1. The next step is for the **No** path from the **Decision Step** we just added to the workflow.
2. Drag and drop an **Instruction Step** onto the canvas and double-click to edit.
3. Enter “Unable to Inspect Pump” within the **Title** field. Enter “Be sure to contact the customer and let them know that inspection cannot be performed today and that it will be rescheduled” within the **Description** field and click **Complete**.

■ Instruction Step

Step Information

Unable to inspect pump

Be sure to contact the customer and let them know that inspection cannot be performed today and that it will be rescheduled.

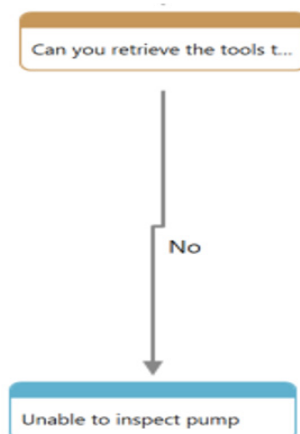
Add Note...

Assets

No assets. Drag a resource onto here to add an asset.

Complete

4. Drag a connector from the previous **Yes/No Decision Step** to the **Instruction Step**.
5. Double-click the connector and type “No” within the text field.



## STEP 7 - INPUT STEP SERIES

The following section will contain a series of **Input Steps**.

1. Drag and drop four Input steps onto the canvas beneath the Watch this video step.
2. Double-click the first **Input Step** to edit. This is going to be the step that prompts the User to take a picture of the asset and will be connected to the **Watch this Video** input step.
3. Select **Photo** from the drop-down menu. Enter “Capture image of asset” within the **Title** field.
4. Enter “Capture image of the pump and mark any visible defects” within the **Description** field and click **Complete**.

Pump Inspection - : Capture im... X

Input Step Photo   Optional  Fail Path

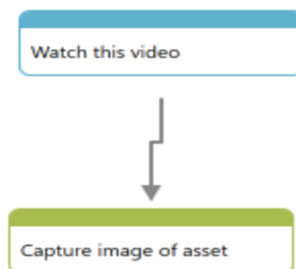
Step Information

Add Note...

Assets +

No assets. Drag a resource onto here to add an asset.

5. Drag a connector from the **Instruction Step** to the **Input Step**.



6. Double-click to edit the next **Input Step**. This step will ask the user to video/record the asset but it will be an optional step. This means that the user can skip past this step in the workflow.
7. Choose **Video** from the drop-down menu and enable the **Optional** check box. Enter “Capture video of asset” within the **Title** field. Enter “Capture a video of the pump (Optional)” within the **Description** field and select **Complete**. Refer to figure that follows.

Input Step   Video   Hint    Optional    Fail Path

Step Information

Capture video of asset

Capture a video of the pump (Optional)

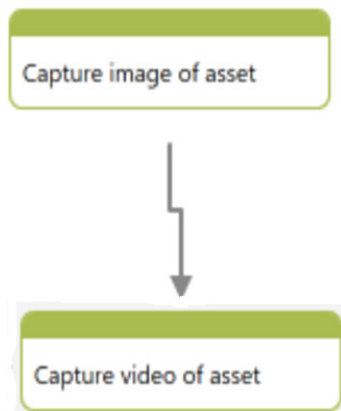
Add Note...

Assets

No assets. Drag a resource onto here to add an asset.

Complete

8. Drag a connector from the previous **Input Step** to this **Input Step**.

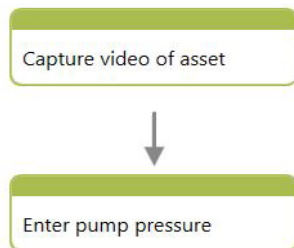


- Double-click to edit the next **Input Step**. This step will ask the user to enter the pump pressure. It must also contain a **Fail Path** which is another path in the flow if the user input **fails** validation. In this scenario, if the pressure is not within the **0-100** threshold, the user will be directed down the **Fail Path**.
- Choose **Numeric** from the drop down box. A hint in “**psi**” is provided so the user knows the measurement.

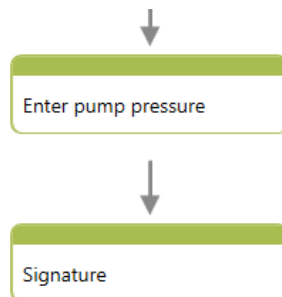
11. Enable the **Fail Path**, **Quantity Buttons** and **Range Check** check box options and then enter **0** to **100** within the **Range fields**.
12. Type “Enter pump pressure” within the **Title** field. Enter “Locate the pressure gauge and enter pressure reading” within the **Description** field.
13. Next, you will need to add the pump image as a visual aid for the user. Click the + (Plus) and select the image from the **Pump Inspection Resources** folder and select **Complete**.

The screenshot shows the configuration interface for an input step. At the top, there are options for 'Input Step' (set to 'Numeric'), a unit field (set to 'psi'), and checkboxes for 'Optional' (unchecked) and 'Fail Path' (checked). Below this, there are checkboxes for 'Quantity Buttons' (checked) and 'Range Check' (checked), with a range field set to '0 to 100'. The 'Step Information' section contains a title field with 'Enter pump pressure' and a description field with 'Locate the pressure gauge and enter pressure reading.'. There is an 'Add Note...' section with a warning icon. The 'Assets' section is currently empty, with a '+ Add' button highlighted. A 'Complete' button is located at the bottom right of the interface.

14. Drag a connector from the previous **Input Step** to this **Input Step**.

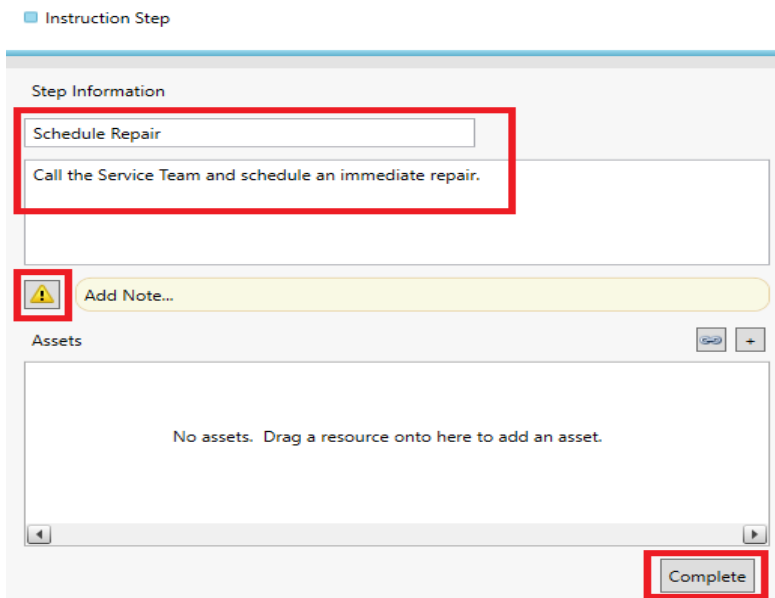


15. The final **Input Step** is going to ask the user to sign off on the workflow by entering a **Signature**.
16. Double-click to edit the **Input Step** and then choose **Signature** from the drop down menu.
17. Enter “Signature” within the **Title** field. Enter “Your Signature Please” within the **Description** field and then select **Complete**.
18. Drag a connector from the previous **Input Step** to this **Input Step**.

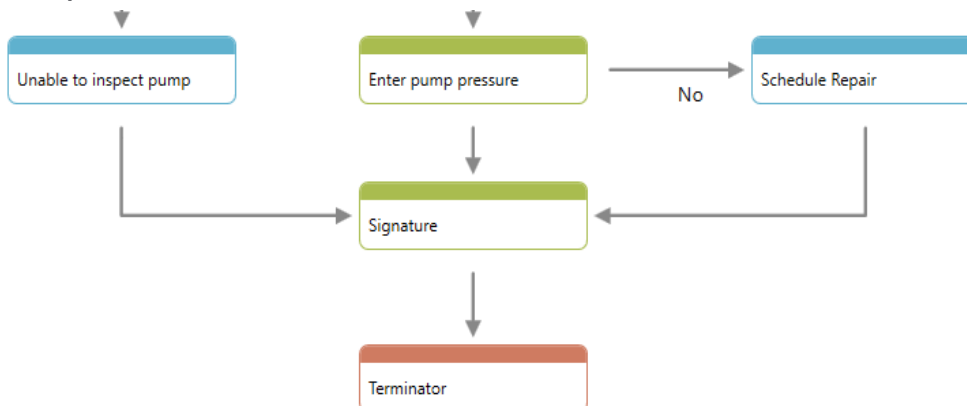


## STEP 8 INSTRUCTION STEP - SCHEDULE REPAIR

1. The last step for the workflow is to add an **Instruction Step** which will complete the Fail Path from the “**Enter Pump Pressure**” **Instruction Step**. The step will direct the user to schedule a repair.
2. Drag and drop an **Instruction Step** onto the canvas to the right of the **Enter pump pressure** step and double-click to edit.
3. Enter “Schedule Repair” within the **Title** field. Enter “Call service team and schedule an immediate repair” within the **Description** field.
4. Click **Add Note** to insert a **Warning**. Enter “Pressure reading is abnormal! Use Caution!” and click **Save**. This will appear just before the step on the user’s device. Click **Complete**.

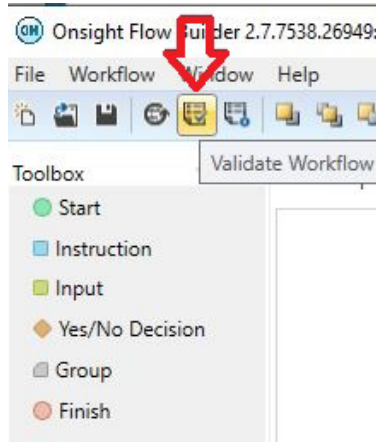


5. Drag a connector from the **Enter Pump Pressure** step. to the **Schedule Repair** step. Verify that the connector is set to “No”.
6. Drag a connector from the **Schedule Repair** step to the **Signature Input Step**.  
**NOTE:** Signature Step is not supported on the HMT device.
7. Drag a connector from the **Unable to inspect pump** found on Page 9 to the **Signature Step** and connect the **Signature Step** to the **Terminator Step** as shown below.



## STEP 9 VALIDATION - VALIDATING THE WORKFLOW

1. You must click the **Validate Workflow** icon to validate the workflow and confirm there are no errors and/or warnings in the design of the workflow.

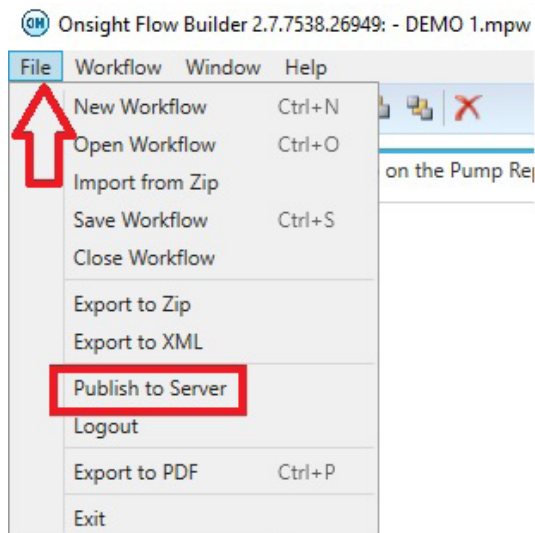


2. Flow Builder will notify you if any errors or warnings are found. If any are found, they must be corrected prior to publishing the workflow. Once validation is finished without finding any errors or warning, save the workflow.

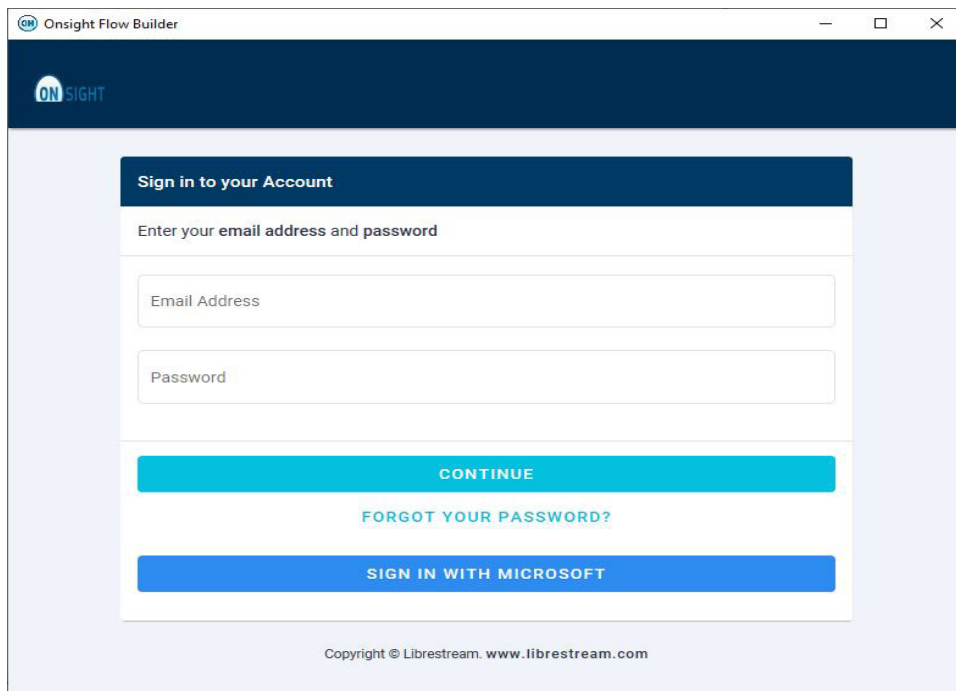
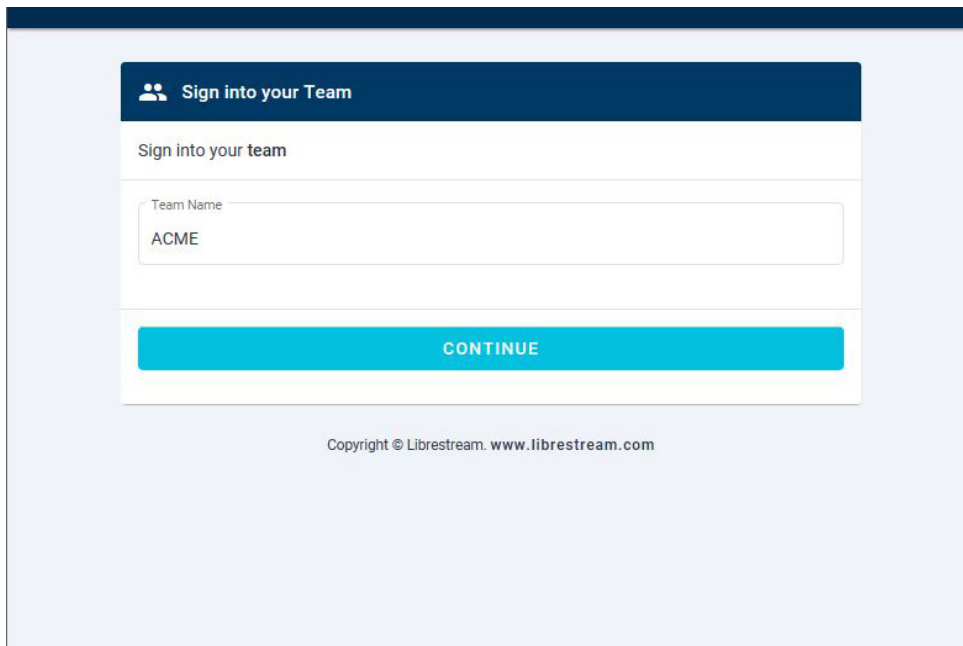
The workflow is complete.

## STEP 10 - PUBLISHING THE WORKFLOW

1. Once a workflow is valid, it can be published and made available to the Team. You can choose to upload it as a new workflow or update to an existing one.
2. To publish to the server, go to: **File -> Publish to Server**.



3. Launch Onsight Flow and enter your Flow login credentials  
**NOTE:** you must have “**Editor**” permissions to publish workflows.



4. Select the type of Workflow from the **Workflow** drop-down menu.
5. Enter information within the **Name**, **Description** (Optional), **Version Notes** (Optional) fields.
6. Select **Live** from the **Mode** drop-down.

**Publish Workflow** [X]

Workflow\*

Name\*

Description

Mode\*

Version Notes

\*Required




**Publish Workflow** [X]

Processing workflow...



**Published Workflow** [X]

 The workflow was published successfully.

7. Click **Create Workflow**. A message appears that indicates that Workflow was published successfully. This completes the procedure.