# Onsight Workspace
## User Guide

LIBRESTREAM

# Copyright

**Onsight Workspace**

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# Contents

# 1. OVERVIEW



**Figure 1-1 Onsight Workspace**

**Onsight Workspace** is a secure online tool for Onsight Connect users to centrally manage their **Onsight Content** including **video** and still **images**. Using Workspace, Onsight users can efficiently manage, maintain and share their Onsight generated content.

Workspace provides tools to:

1. **Upload** Onsight generated video and still images:

    ◦ Perform **Automatic Uploads** when Onsight calls end.

    ◦ Manually upload content from the **Files** panel.

    ◦ Monitor **Upload Queue** status.

    ◦ Launch Workspace from **Onsight Connect** clients to view the repository.

2. Perform **File Management** tasks:

    ◦ View images and edit telestrations.

    ◦ View Onsight video recordings including telestration and shared images.

    ◦ Create **Onsight Video Clips** from recordings.

    ◦ Create file versions for tracking edits and audit control.

    ◦ **Search** tags, titles and Metadata.

    ◦ **View Favorites**, **Recent Files** and **Recent Activity** from the Dashboard on the **Home** page.

# 2. LOGIN TO WORKSPACE

Your **Onsight Administrator** must enable access to **Onsight Workspace** before you are able to login to the Workspace or upload content. There are three ways to login to Workspace:

1. Using any **Onsight Connect Client** running on a Personal Computer (PC), smartphone, tablet or Onsight device.

2. Using **Onsight Platform Manager**.

3. Using a web browser.

## Web Browser Support

The following web browsers have been tested with Workspace and provide full support:

- **Google Chrome**

- **Safari iOS 10.2** and **Macintosh** (Mac)

- **Microsoft Edge**

> **Note:** Internet Explorer is not supported. **Firefox** can display content but is unable to play video content.

## 2.1. Login From an Onsight Connect Client
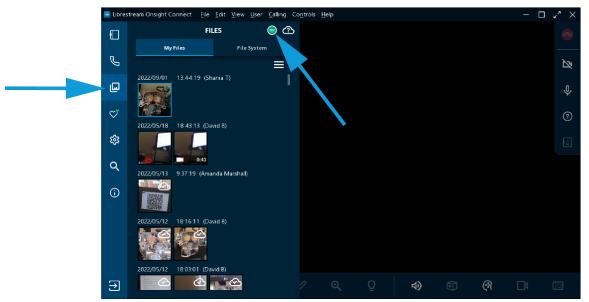


**Figure 2-1 Login from an Onsight Client**

Use your Onsight user credentials to login to Onsight Connect using a PC, smartphone or Onsight 5000HD Smartcam.

Click **FILES** and select the **green Workspace ON** button to launch **Onsight Workspace**. You will be re-directed to a browser and automatically logged into the Onsight Workspace.

> **Tip: External Guest Users** cannot access Workspace.

**Related information**

## 2.2. Login Directly to Workspace



**Figure 2-2 Login Direct to Workspace**

You can login directly to Workspace using a browser and your Onsight user account by navigating to the **Onsight Workspace** login page:

- https://workspace.librestream.com

Enter your Onsight account credentials. You will be temporarily redirected to the **OPM login** screen in order to authenticate your credentials.

**Related information**

## 2.3. Login Via Onsight Platform Manager



1. Open a web browser to login to OPM and navigate to:

   ◦ https://onsight.librestream.com

2. Enter your user name and password that Librestream provided to you via email in the following format:

◦ **User Name**: user@domain.com

◦ **Password**: Password

3. Click **Login**.

4. Click the **Launch Workspace** link on the right.

> **Note:** To avoid unauthorized access to the software, you should change this password immediately after logging in for the first time.

**Related information**
LOGIN TO WORKSPACE *(on page 7)*

# 3. WORKSPACE HOME PAGE



**Figure 3-1 Workspace Home Page**

## Dashboard

The Workspace Homepage user interface includes a menu and a Dashboard that includes:

1. **Getting Started Tutorials**.

2. **My Favorites** — Content marked as favorite. By default, users' upload folders are automatically added to their Favorites list for quick access.

3. **Recent Activity** — A list of recent activity in the Workspace based on the user's Read permissions.

4. **My Recently Viewed** — List of recently viewed content.

5. **Browse** — File system explorer.

6. **Search** — File names, tags, metadata.

7. **Personal Space** — Stores private user content accessible only by the owner. The owner can edit permissions to share access to the personal space with other users.

8. **Clipboard** — Copy media between folders using the clipboard.

9. **Recent Recordings** — Recently recorded files that contain audio, video, and transcription content.

10. **Trash** — Recently deleted items.

11. **Administration Settings** — Access Administration functions and generate reports.

12. **User Settings** — Enable you to access your **Profile**, **Settings** and **Sign Out**.

# 3.1. Getting Started Tutorials
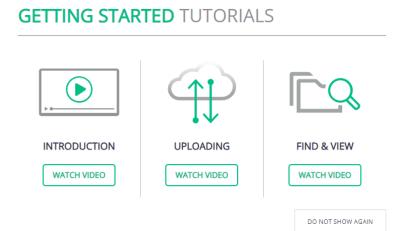


**Figure 3-2 Getting Started Tutorials**

The **Getting Started Tutorials** section provides an introduction to Workspace along with instructions on how to upload files from Onsight clients, and how to find and view files in the Workspace.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

# 3.2. My Favorites



**Figure 3-3 My Favorites**

**My Favorites** is a quick access list of files and folders. You can quickly find your **Upload** folder by viewing the **My Favorites** panel on the dashboard or clicking the **Favorites** ☆ icon within the menu. Your upload folder will contain all the files you have uploaded from our Onsight client.

When you select a file or folder, you can use the **Add to Favorites** ☆ icon within the **Selection Toolbar** to add it to the list.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

## 3.3. My Recently Viewed



**Figure 3-4 Recently Viewed Files**

A list of recently viewed files and folders. The list is displayed in a panel within the dashboard and is accessible by clicking the **Recently**

**Viewed**  icon within the **Menu**.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

## 3.4. Recent Activity



**Figure 3-5 Recent Activity**

A list of recent activity in the Workspace based on you user permissions.

ⓘ  **Tip:** You will only see files and folders to which you have been granted access.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

# 3.5. Browse - Find & View Files



**Figure 3-6 Browse**

Click the **Browse** [icon] icon within the **menu** to access the shared Workspace directory. You will see folders that you have been granted access to. Your upload folder (accessible from your **My Favorites** list) can also be found by following the upload path. Your upload path is displayed when you log in to an Onsight client under **System Health > Details > Workspace Upload Path**:

- `/mycompany.com/workspaces/Engineering/b.engineering@mycompany.com/`

Your Workspace upload folder can be seen using the **Browse** [icon] icon and navigating to the path displayed above:

**Related information**

# 3.6. Search



The menu provides a **Search** tab that enables you to search for Workspace content. The search tool will look for any file or folder that contains the search phrase you have entered. The Search can include the title, description, author, keywords, tags, and device names associated with your Onsight files.

Click the **Search** [icon] icon within the **menu** to access the **Search Filters** panel. Search options include:

- **Full Text** search

- **Modification Date**

- **Authors**

- **Tags**

- **Size**

Enable the search options and click the **Search** button to execute. Click the **Clear** button to uncheck (Clear) all enabled search option check boxes.

**Related information**

## 3.6.1. Full Text Search



Use the **Full Text** search field to look for files and folders that contain words that start with your search phrase.

1. Enter your search phrase within the **Full Text** field.

2. Type partial words to search for specific terms that starts with your phrase, e.g., eng will find engine, engineer.

> **Tip:** The wildcard characters * (asterisk) is automatically added as a suffix to your search phrase, e.g., eng is searched as though you typed eng*.

3. To search for specific words, put the search phrase in `double quotes ("")`, e.g., "inspection complete" will only find files with that specific phrase.

4. To search for documents containing all of the words entered, separate them with a `single space`. E.g., engine inspection complete. This is equivalent to typing: engine `AND` inspection `AND` complete.

5. To search for documents containing any of the words entered, separate them by using `OR`. E.g., engine `OR` inspection `OR` complete.

6. To search for a document that does not contain a specific word, place a `hyphen` or `dash` in front of it. E.g., engine inspection -overhaul. This will search for documents containing engine and inspection but not overhaul.

> **Note:** if you are searching for a document that contains a hyphenated word, i.e., it contains a dash, "-", then you must enclose the search phrase in `double quotes ("")`. E.g., `"hazardous-waste"`. Not placing the search phrase in double quotes would result in a search for documents that included the word hazardous but not waste.

> **Tip:** The following characters are not searchable: `*!#$%&'()*+,./\\\\:-@{|}`^~`

**Additional Search Filters**

You can filter searches by:

- **Creation date**

- **Modification date**

- **Authors**

- **Tags** added as **Search** phrases

- **Size** of files

> **Note:** Tags added to a file are valid search fields only when searching within Workspace. If the file is downloaded and shared between Onsight endpoints, the Tag will not be included in any local searches.

> **Tip:** Device name is the name of the Onsight client you uploaded your file from, e.g., your iPhone's name under **Settings > About > Name**.

**Related information**
Search *(on page 14)*

## 3.6.2. Search Results



**Figure 3-9 Search Results**

Search results are displayed to the right of the **Search** panel. For quick access to the files in the search results, you can toggle your

**Search** view between **Filter View** and **Queue View** .

- Click **SWITCH TO QUE VIEW** to display a list of the files in the Search panel. Select any file or folder in the list to view the contents.

- Return to the **Search Filter** by clicking the **SWITCH TO FILTER VIEW** icon.

Click the **CLEAR** button to reset the search parameters.

Click the **SEARCH** button to search again.

**Related information**
Search *(on page 14)*

# 3.7. Personal Space



**Figure 3-10 Personal Space**

**Personal Space** (PS) is your private folder that, as the owner, only you can access. You can create folders and add files to your PS. You may add any document type to your PS including PDFs, and Word documents, etc.

1. Click the **Personal Space** icon within the menu to open the panel.

2. Click the **Add Content** button to add documents or create folders in your PS.

3. You may copy or move files from your upload folder into your PS.

4. You may edit permissions to share access to your personal space with other users.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

# 3.8. Clipboard



**Figure 3-11 Clipboard**

The clipboard enables you to move, copy, and paste files between folders.

1. Use **Browse** to find the files you wish to copy.

2. Click to enable one or more file check boxes.

3. Click the **Add to Clipboard** icon to copy the asset (Video, image, document etc.).

4. Use **Browse** to navigate to the folder you wish to paste the file into.

5. Click the **Clipboard** [icon] icon on the menu.

6. The **Clipboard** panel opens to the right of the **Menu**.

7. Click the **Paste** button to place a copy of the file in the folder; or

8. Click **Move** button if you wish to move the file to the folder.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

# 3.9. Recent Recording (Search)



Click **Recent Recordings** [icon] icon from the **Menu** to easily locate transcription audio and video by searching for content.

Filter your search by:

  - • **Full Text**

  - • **File Type** (Audio/Video)

  - • **Recording Date**

  - • **Author**

  - • **Tags**  added as **Search** phrases

Enable the search options and click the **Search** button to execute. Click the **Clear** button to uncheck all enabled search option check boxes.

When you select a **Call Audio.wav** [icon] file, you can **Play** [icon] the Audio and display the transcription text. Additional operations include:

  - • **Preview** [icon] (New Window)

  - • **Download Transcript** [icon]

  - • **Download Audio** [icon]

# 3.10. Administration



**Figure 3-13 Administration**

Click **Administration** within the **Menu** to access Administration functions. These functions can be enabled by your Workspace Administrator, and they enable the user to generate reports based on **Analytics**, **Users & Groups** data, and allows you to view information details using the **About** Workspace function.

**Related information**

## 3.10.1. Analytics

Click **Administration** within the **Menu** and select **Analytics** functions to access:

- **DOCUMENT DISTRIBUTION**

- **REPOSITORY CONTENT**

**Related information**

## 3.10.1.1. Document-Distribution
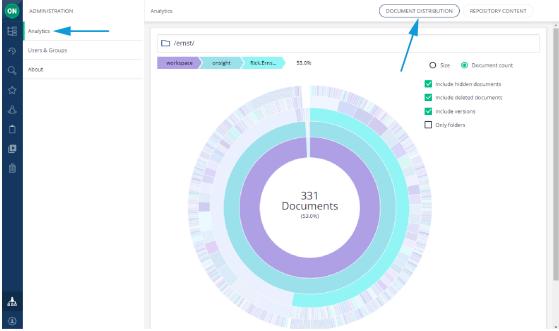


**Figure 3-14 Document Distribution**

Click **Administration** within the **Menu** and select **Analytics > DOCUMENT DISTRIBUTION** to access an interactive chart that shows your documents and how they are distributed within Onsight Workspace. The chart updates as you hover over specific color regions of the interactive chart to display **Domain > Root Directory > Upload Folder > User > Date** and **File Content** that also includes a **Percentage** (%) value of the total space.

> ℹ️ **Tip:** Your **Upload Folder** is defined by within your OPM **Client Policy**.

You can filter content by:

- **Size**

- **Document count**

You can also enable options for display:

- **Include hidden documents**

- **Include deleted documents**

- **Include versions**

- Show **Only Folders** by hiding documents

**Related information**

# 3.10.1.2. Repository Content



**Figure 3-15 Repository Content**

Click **Administration** within the **Menu** and select **Analytics > REPOSITORY CONTENT** to learn more about the content that exists within your repository by generating a summary for content created **After** and **Before** a specific date range. Repository content includes:

- A number value for **DOCUMENTS**

- A description of **DOCUMENT TYPES**

- A list of **TOP 10 CREATORS**

- A line chart that displays **DOCUMENT CREATED PER WEEK**

- A line chart that displays **DOCUMENTS MODIFIED PER WEEK**

**Related information**

## 3.10.2. Users & Groups



**Figure 3-16 User & Groups**

Click **Administration** within the **Menu** and select **Users & Groups** to:

- • **Search for users and groups**

- • Identify **Recently Created Users** and groups by a user's

  ◦ **Name**

  ◦ **Identifier**

**Related information**
Analytics *(on page 19)*

## 3.10.3. About Workspace



**Figure 3-17 About Onsight Workspace**

Within **Administration**, click **About** to review:

- • The Onsight Workspace software **Version** number

- • **Terms of Use**

- Links to **Connect with Us** (Librestream Technologies Inc.) using social media accounts

- **Copyright** information

**Related information**
Analytics *(on page 19)*

# 3.11. User Settings



**Figure 3-18 User Settings**

Click the **User Settings** icon within the **Menu** to access your user **Profile**, **Settings**, and **Sign Out**.

**Related information**
WORKSPACE HOME PAGE *(on page 11)*

## 3.11.1. Profile



**Figure 3-19 Profile**

Within the menu, click **User Settings > Profile** to review your **User Information**:

- **Username**

- **Company**

- **Groups**

- **Local Permissions**

- **Member Permissions**

- **Tenant Permissions**

**Related information**
User Settings *(on page 23)*

## 3.11.2. Settings



**Figure 3-20 Settings**

Within the menu, click **User Settings > Settings** to enable or disable the **Show Start Page** option. This option enables you to include or hide the **Getting Started Tutorials** section from the Workspace Home page.

**Related information**
User Settings *(on page 23)*

## 3.11.3. Sign-out

Within the menu, click **User Settings > Sign Out** to **Exit** Workspace. You can log back in by navigating to:

- https://workspace.librestream.com

Sign in with your Onsight user credentials.

**Related information**
User Settings *(on page 23)*

# 4. WORKSPACE CONTENT OPERATIONS

Content can be added to **Workspace**:

- Automatically

- Manually by uploading files from Onsight client

- Manually by uploading content from a PC

Thereafter, a user can edit, create new versions, modify permissions and delete files as necessary.

## 4.1. Automatically Upload Files from an Onsight Client



**Figure 4-1 Upload Status Screen**

Your account can be configured to automatically upload all images captured during an Onsight call. When a call ends, you will see the upload status bar appear onscreen. When the upload completes, all the uploaded files will be marked with the upload succeeded (Check mark).

**ⓘ** **Tip:** Files will only be uploaded when you are not in an Onsight call. Uploads will automatically pause if a call is established and will resume once the call ends.

You can view the upload status by clicking the **Upload Status** icon. You can pause, continue or cancel any file uploading on the **UPLOAD STATUS** screen.

**✎** **Note:** You can still manually upload files when **Auto Upload** is enabled.

**Related information**
WORKSPACE CONTENT OPERATIONS *(on page 25)*

## 4.2. Manually Uploading Files from an Onsight Client
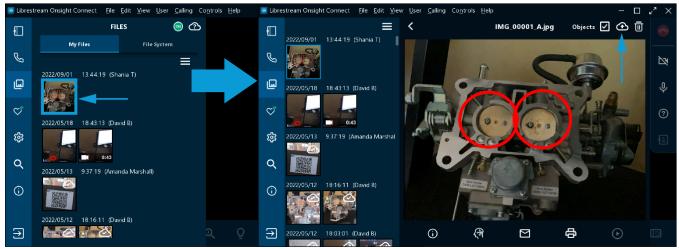


**Figure 4-2 Onsight Client**

To manually upload a file from an Onsight endpoint:

1. Click **Files** ![icon] within the **Left Toolbar** and select one or more file(s).

2. Click the **Upload** ![icon] icon.

> ![info] **Tip:** The file upload will begin immediately if you are not in a call. If you are in a call the upload will begin when it ends.

3. The status of the upload can be viewed by clicking the **Upload Status** ![icon] icon.

When the upload has completed, the file will be marked with a white **Upload Succeeded** (Check mark) shown in the top-right corner of the image.



**Related information**

# 4.3. Upload Content from a PC



**Figure 4-4 Upload Content from a PC**

Uploading content to your Workspace can be done from your PC. This enables you to collaborate within your Workspace using content from other sources such as schematics, PDFs, images and recordings. You can add content to the Workspace by clicking the **Browse**

icon and navigating to the location where you would like to add content, and then click the **Add Content** button.

Click to access the **CREATE FOLDER** tab where you can add a title for the folder name and click **CREATE**.

Click the **ADD FILES** tab to drag and drop files to upload to Workspace and click **CREATE**. The list of supported content categories is:

- **File**

- **Folder**

- **Picture**

- **Video**

- **Audio**

> **Tip:** Any content added to Workspace will be shared unless you turn off sharing by blocking permissions. You must have **Everything rights** to adjust permissions within the shared Workspace.

**Related information**

# 4.4. Add Content to Your Personal Space

To add content to your personal space, click the **Personal Space** icon, and click on the **Add Content** button. Any content added to your PS will be private. If you want to share content in your PS, copy or move it to a folder in the shared Workspace, or edit the permissions to enable access.

**Related information**

# 4.5. Edit Documents
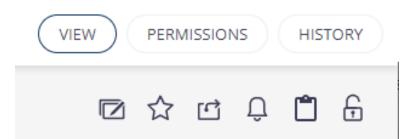


**Figure 4-5 Edit Document Buttons & Selection Toolbar**

Whenever you select a file, the several buttons and a **Selection Toolbar** display. The buttons include:

- **View** — The image or recording you have selected is visible in the **View** window.

- **Permissions** — The permission settings on the file are displayed. If you are the owner of a file or folder, you can edit permissions to share the access to the folder with other users.

- **History** — All actions performed on the file are listed.

The following functions are available within the **Selection Toolbar**.

- **Edit document**  — Edit the **Title** for the document.

     **Tip:** Changing the title does not change the filename. It will retain the original filename it had at the time it was uploaded.

- **Add to Favorites**  — Adds the file to the **FAVORITES** list.

- **Share**  — Provides the link to the document for sharing with others. Users must have an Onsight account to view a shared document.

- **Notify Me**  — Enables document alerts to be sent to your email address. Any activity on the document will generate an alert.

- **Add to Clipboard**  — Copies the document to the clipboard.

- **Lock**  — Locks the document so that only the owner may edit.

**Related information**
WORKSPACE CONTENT OPERATIONS *(on page 25)*

## 4.5.1. Edit Images



**Figure 4-6 Edit Image**

When an image is selected, **Telestration** (Drawing onscreen) is permitted. Click the **Pencil** (Enable/Disable Telestration) 🖊 icon to access additional telestration tools. When enabled, the **Pencil** (Enable/Disable Telestration) 🖊 icon changes color to be **green**. The following functions are accessible:

1. **SHOW** SHOW ⬤ (Show/Hide telestration).

2. Assign **Color** 🔴 to telestrations.

3. **Select telestration tool** ✎ — When selected, this option reveals additional telestration tools in the top-left corner of the frame:

   ◦ **Freehand** ✎ — Enables you to sketch and draw irregular lines.

   ◦ **Ellipse** ◯ — Enables you to draw ellipses and circles.

   ◦ **Rectangle** ▢ — Enables you to draw rectangles.

   ◦ **Line** ╱ — Enables you to draw straight lines.

   ◦ **Arrow** ↗ — Enables you to add directional arrows.

   ◦ **Text** T — Enables you to add text labels.

4. **Undo** ↺

5. **Erase all telestrations** ◇ — Erases all annotations.

6. **Save telestration** 💾 — Finalizes the document and saves changes.
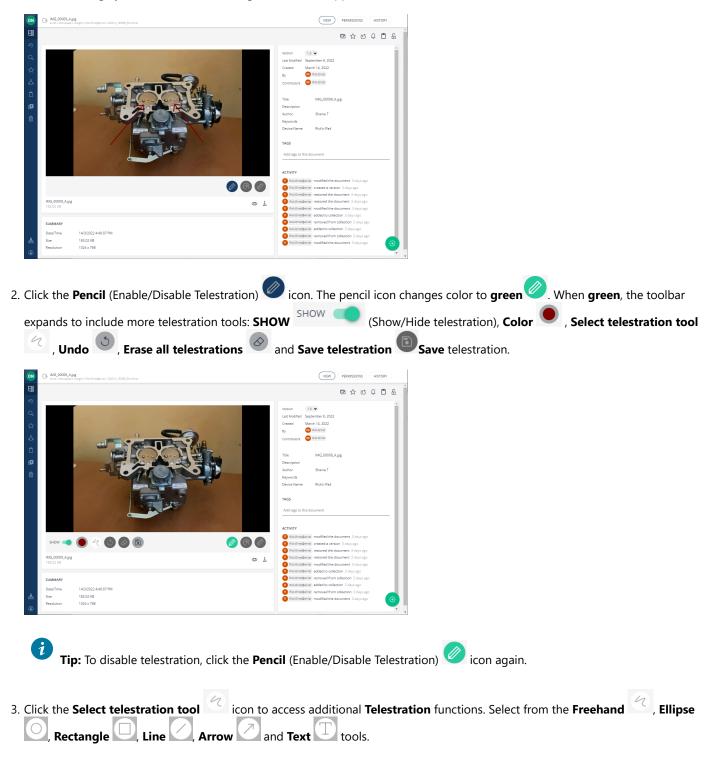
Next to the filename, click to access:
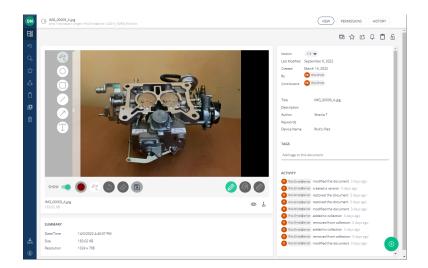
   • **Preview** 👁 — To view the image in a larger window.

   • **Download** ⤓ — To **Download Image** complete with telestrations burned-in as a single-layer raster image; or **Download Onsight Image** without any telestrations.

**Related information**

## 4.5.1.1. Editing Images

1. Select the image you wish to edit. The image and toolbar appear.



2. Click the **Pencil** (Enable/Disable Telestration)  icon. The pencil icon changes color to **green**  . When **green**, the toolbar expands to include more telestration tools: **SHOW**  (Show/Hide telestration), **Color**  , **Select telestration tool**  , **Undo**  , **Erase all telestrations**  and **Save telestration**  **Save** telestration.



 **Tip:** To disable telestration, click the **Pencil** (Enable/Disable Telestration)  icon again.

3. Click the **Select telestration tool**  icon to access additional **Telestration** functions. Select from the **Freehand**  , **Ellipse**  , **Rectangle**  , **Line**  , **Arrow**  and **Text**  tools.

a. Telestrate (Draw) on the image.

b. When finished, you must click the **Save telestration**  icon to apply your telestration to a Working copy of the image.

4. You can click the **Preview**  icon to view the image in a larger window.

5. You can also click **Download**  to view it locally on your PC or device with the following options:

a. **Download Image** — Merges the Telestration & Onsight Image layer into a single-layer raster image prior to downloading.

b. **Download Onsight Image** — Downloads the Onsight image without any telestrations.

6. When finished, you must click the **Save telestration**  icon to apply your telestration to the Working copy of the image.

 **Note:** Your original version is still available. By saving, you have created a working copy of the original. If you wish to save a permanent version of the Working copy, navigate to the Version drop down menu and select Create Version. You will be asked to select a minor or major version number for the new version. Click Create Version.

7. You now have two versions of the image, the original and the new version. Navigate to the **Version** drop down list to select the version you wish to view.

8. If you want to edit the image further, select **Working Copy** from the **Version** drop down list and begin your new edits. This completes the procedure.

**Related information**

## 4.5.2. Edit Video
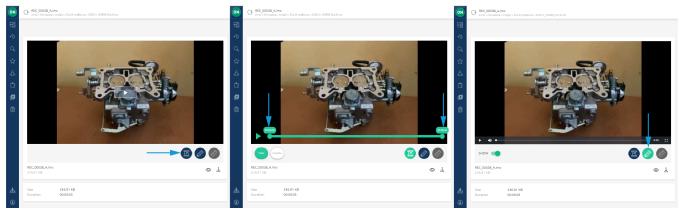


**Figure 4-11 Edit Video**

When a video is selected, the following functions video tools are accessible:

- Click the **Trim Video** [icon] icon to access video **Trim Video** [icon] functions. The icon changes color to be **green** and the video can be trimmed by dragging one or both endpoints to shorten the video duration. Click **Trim** to finalize or **Cancel** to discard your changes.

- Click the **Pencil** (Enable/Disable Telestration) [icon] icon to access **Telestration** tools. The icon changes color to be **green** with the option to **SHOW** [SHOW toggle] (Show/Hide telestration).
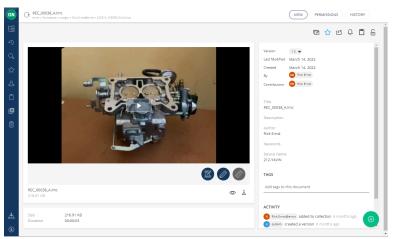
**Related information**
Edit Documents *(on page 28)*

## 4.5.2.1. Editing Video

In this task, you will select a video and explore editing capability, as required.
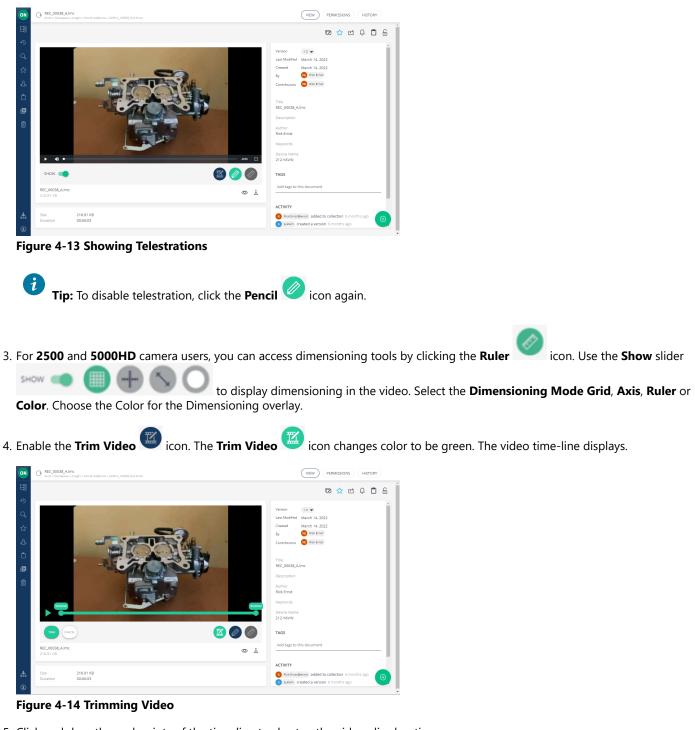
1. Select the video you wish to edit. The video and toolbar appear.



**Figure 4-12 Editing Video**

2. Enable Telestration by clicking the **Pencil** (Enable/Disable Telestration) [icon] icon. The pencil icon changes color to become a **green Pencil** (Enable/Disable Telestration) [icon]. When **green**, the toolbar expands to include **SHOW** [SHOW toggle] (Show/Hide telestration).

**Figure 4-13 Showing Telestrations**

**Tip:** To disable telestration, click the **Pencil** icon again.

3. For **2500** and **5000HD** camera users, you can access dimensioning tools by clicking the **Ruler** icon. Use the **Show** slider to display dimensioning in the video. Select the **Dimensioning Mode Grid**, **Axis**, **Ruler** or **Color**. Choose the Color for the Dimensioning overlay.

4. Enable the **Trim Video** icon. The **Trim Video** icon changes color to be green. The video time-line displays.



**Figure 4-14 Trimming Video**

5. Click and drag the end points of the time line to shorten the video clip duration.

6. Click **TRIM** to shorten the video clip duration or press **CANCEL** to discard your changes.

7. You now have a Working Copy of the video clip.

8. Navigate to the **Version** drop down menu and select **Create Version**. You will be asked to assign a minor or major version number for the new version. Click **Create Version**.

**Note:** Your original version is still available. By creating a version, you have created a trimmed copy of the original. You now have two versions of the image, the original and the new version. Navigate to the Version drop-down list to select the version you wish to view.

9. If you want to edit the video further, select **Working Copy** from the **Version** drop-down list and continue editing.

10. If you want to create more clips from the original video click **RESTORE 1.0** to make the original video your **Working Copy**.

11. You can click the **Preview** 👁 icon to view the video in a larger window or click **Download** ⤓ to view it locally on your PC or device as a Librestream Media Container (LMC) file.
    This completes the procedure.

**Related information**
Edit Video *(on page 32)*

# 4.6. Versioning



**Figure 4-15 Versioning an Image**

Versioning helps you to keep track of any changes made to a file. When you upload an Onsight image to Workspace, it is automatically assigned version number 1.0. It is archived in its original state. Any editing of the image will require the creation of a **Working Copy** on which you will perform your edits and create a new Version when ready to create a permanent archive of the version.

**Related information**
WORKSPACE CONTENT OPERATIONS *(on page 25)*

## 4.6.1. Versioning an Image
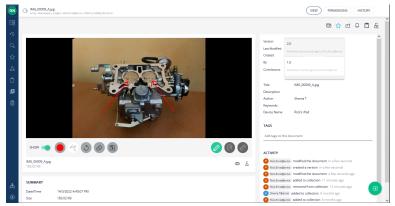


**Figure 4-16 Versioning an Image**

When creating new versions of an image, the steps are as follows:

1. Select the image.

2. Use the **Version** drop-down menu to select the version of the image to edit. For new files, the default is Version 1.0.

3. Click the **Pencil** (Enable/Disable Telestration)  icon. Make your telestration edits.

4. Click **Save telestration** . When you save changes, you are creating a Working Copy of the image. You can make multiple changes to the Working Copy. Each change you make must be saved.

5. When you are ready to commit the Working Copy to a Version, navigate to the **Version** drop down menu and click the **CREATE VERSION** button.
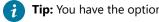


**Figure 4-17 Version Scheme**

6. A prompt appears asking you to define the version scheme as:

   ○ **Minor version** (1.1, 1.2, 1.3 etc.)

   ○ **Major version** 1.0, 2.0, 3.0 etc.)
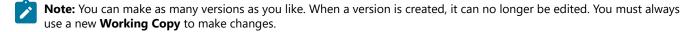
   Click **Create version**.

7. At this point, you will have two versions available: The original, version 1 and the newly created version.

8. The newly created version will be the starting point or **Working Copy** for any additional edits.

    **Tip:** You have the option of selecting any version as the Working Copy if you wish to make more edits.

9. To designate another version as the **Working Copy**, navigate to the **Version** drop down list and select the version you wish to edit.

10. Click the **RESTORE** button to make it the Working Copy. If you select another version as the Working Copy, you will lose any edits on the current Working Copy unless you create a version first.

     **Note:** You can make as many versions as you like. When a version is created, it can no longer be edited. You must always use a new **Working Copy** to make changes.

    This completes the procedure.

**Related information**
Versioning *(on page 34)*

# 4.7. Permissions



**Figure 4-18 Accessing Permissions**

As the owner of your PS and **Upload** folder, you can share access to them by editing permissions. You can only edit permissions if you are the owner of the file or folder.

> **Note:** Your upload folder can be shared with everyone depending on how your Administrator has configured Workspace.

**Related information**
WORKSPACE CONTENT OPERATIONS *(on page 25)*

## 4.7.1. Editing Permissions

To edit file and folder permissions:

1. Login to Onsight Workspace.

2. Navigate to the file or folder to which you wish to manage permissions.

   ◦ Click the **Browse**  icon; or

   ◦ Navigate to your **Personal Space** ; or

   ◦ Navigate to **My Favorites** by clicking **Favorites**  from the menu.

   Select your file or folder.

3. Click the **Permissions** button in the upper right-hand side of the screen.

**Figure 4-19 Accessing Permissions**

4. Click **BLOCK** to remove the current permission settings. You and the administrator will still have access to the file.

5. To grant additional access to specific users and/or groups, click the **NEW** button.

6. Search for users and groups by entering text in the **User/Group** field. Select the **Right** to assign to the user or group from the drop-down list.

    a. **Read**, **ReadWrite** or **Everything**

> ✏️ **Note:** Everything enables a user to manage permissions as well as ReadWrite.

7. Select the **Time Frame** for the duration of the Right to be applied.

8. **Permanent** or **Date-Based** (if using Date-Based enter the time period)

9. Send an email to notify users is selected by default.

10. Click the **CREATE** button to apply the permissions to the file or folder.

    a. Click **CREATE AND ADD ANOTHER USER** if adding more than one user to the permissions list.

11. The permission will be added to the **PERMISSIONS DEFINED LOCALLY** section.

12. To return to the default permission for a file or folder, click the **UNBLOCK** button on the permissions page.

    a. Also, delete the new permissions that were added to the **PERMISSIONS DEFINED LOCALLY** section.

> ℹ️ **Tip:** Administrators will always have access to all files and folders regardless of the defined permissions in the **PERMISSIONS DEFINED LOCALLY** section.

This process must be repeated for any private file or folder that you want to share with others.

> ✏️ **Note:** Whenever you **BLOCK** a file or folder you own, you will maintain your access to the file or folder unless removed by the administrator.

**Related information**
Permissions *(on page 36)*

# 4.8. Delete Files



**Figure 4-20 Delete Files**

Using Onsight Workspace, you can delete files when you:

1. **Browse**  to a file location and select one or more files.

2. Click the **Trash**  icon that appears above the **Selection Toolbar** to delete the file.

**Related information**
WORKSPACE CONTENT OPERATIONS *(on page 25)*

## 4.8.1. Deleting Files

1. Find the file or folder you wish to delete using the **Browse**  icon.

2. Check the selection check box next to one or more items. The **Selection Toolbar** will appear at the top of your browser.



**Figure 4-21 Selection Tool Bar**

3. Click the icon above the **Selection Toolbar**.

4. Decide to:

   ◦ Confirm the deletion by clicking **OK**.

   ◦ Click **Cancel** to abort the deletion.

5. If you selected **OK** in the previous step, then the file or folder will be flagged as deleted and is no longer accessible from Workspace.

6. Contact your Workspace Administrator if you wish to recover any files you have put in the trash.

   **Note:** Files cannot be recovered if they have been permanently deleted by the Administrator.

**Related information**

# 4.9. Trash



**Figure 4-22 Trash**

Click the **Trash** [icon] icon to search for deleted files and folders from Workspace. When deleted, depending on your company's policies, items can only be permanently deleted by your Workspace Administrator. Once an item is moved to the trash, it is no longer accessible by users. Only your Administrator can delete items that have been moved to the trash. Also, trash bin items can only be restored to Workspace by your administrator.

**i** **Tip:** Once items have been deleted from the trash bin, they can no longer be restored.

**Related information**

# 5. Options & Add-ons

## 5.1. Onsight Transcription



Onsight Transcription is a service option that is available for **Onsight Workspace** license. With Onsight Transcripts, you can build a library of call transcripts that is searchable; can augment your existing reports; assist with audits; and use Artificial Intelligence (AI)

features to reduce the cognitive load. When enabled, for your domain, the **Onsight Transcription** icon will appear within Onsight Connect.

Transcription enables you to:

- Auto-upload call **Audio Files**
- Transcribe text in your **Default Language**
- Playback files with **Transcript Tracking**
- Search by **File Type**
- Search by **Transcript Text**
- Download **Transcripts/Audio**

Transcription cannot:

- **Transcribe Video** — Only the Audio (*.Wav) files are transcribed
- **Diarize Audio** — Speakers cannot be identified
- **Translate Mixed Languages** — Only the default language is transcribed.

**Note:**

1. Transcription functions require an Onsight Workspace Enterprise license.

2. Your default language for Transcription is defined by your **Client Policy > Artificial Intelligence > Transcription Language** setting within **Onsight Platform Manager**.

3. When a call starts, a message appears that states: *"By participating in the call you agree to have your conversation recorded and transcribed."* You must click **OK** to continue.

**Tip:** When the call is complete, call information will be uploaded automatically to Onsight Workspace. Call transcription can take longer to process before they will display.

## 5.1.1. Transcription Requirements

Transcription requires specific licenses and **Client Policy** settings enabled for your account. Contact your customer support representative to add **Call Transcription** to your subscription plan.

## 5.1.1.1. Transcription Licenses



**Figure 5-2 Transcription Licenses**

Transcription requires the following licenses:

- **Onsight Connect Enterprise**

- **Workspace Enterprise**

- **Artificial Intelligence > Transcription**

## 5.1.1.2. Transcription Client Policy Settings



**Figure 5-3 Transcription Client Policy Settings**

As a best practice , it is recommended that **Client Policy** be applied at the **Group** level within **Onsight Platform Manager** and that users be added to the group as needed. Client Policy settings must be configured for **Calls**, **Workspace**, and **Artificial Intelligence** categories to support transcription.

### Calls

**Save Call Transcript** must be **Enabled** to support **Transcription**:

### Workspace

The following **Workspace** settings must be **Enabled** to support **Transcription**:

- **Access**

- **Upload Path**

- **Auto Upload Media**

## Artificial Intelligence

The following **Artificial Intelligence** settings must be **Enabled** to support **Transcription**:

- **AI Setting** must point to an **AI Setting** configuration that includes **Transcription API**, **Endpoint**, and **Parameters**.

- **Transcription Language** must be set as the default language for transcriptions from the drop-down menu

For assistance in configuring your **Client Policy** and **Artificial Intelligence** settings, please contact your Onsight Administrator.

## 5.1.2. Finding Transcriptions (Search)



When you access Onsight Workspace, the easiest way to locate transcription audio and videos is to click the **Recent Recordings**  icon from the **Menu**.

Filter your search by:

- **Full Text**

- **File Type** (Audio/Video)

- **Recording Date**

- **Author**

- **Tags** added as **Search** phrases

Enable the search options and click the **Search** button to execute. Click the **Clear** button to uncheck all enabled search option check boxes.

When you select a **Call Audio.wav**  file, you can **Play**  the Audio and display the transcription text. Additional operations include:

- **Preview**  (New Window)

- **Download Transcript** 

- **Download Audio** 

## 5.1.3. Viewing & Playing Transcriptions

Login to Onsight Connect and make a call to a contact and Hang up.

After the call is ended, you can view and play transcriptions by:

**Viewing Transcriptions in Onsight Workspace**
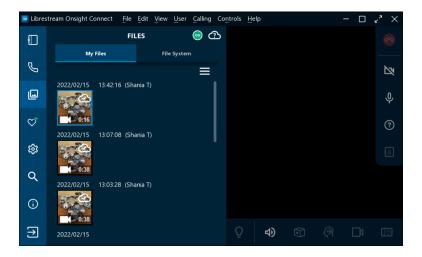
1. Click **Files** . Verify that your call files were uploaded automatically (  ).

2. Launch **Onsight Workspace** by clicking the **Workspace On**  button.

3. The Workspace Home page appears.



4. Click **Recent Recordings**  within the Left Toolbar.

5. Specify your **Search** criteria. For example, enter text within the **Full Text** field as necessary.



6. Filter by **File Type** as required.
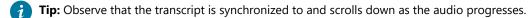
○ Enable **Audio** to include Audio and transcriptions content.

○ Enable **Video** to include video content.

7. Click **Search**. Search results appear on the right.



8. Click one of the **Call Audio.wav** 🔊 icons. The Transcription and Audio file appear on the right.



9. Click **Play** ▶ to listen to the .wav file and transcript for the call.

> ℹ️ **Tip:** Observe that the transcript is synchronized to and scrolls down as the audio progresses.

10. Observe that **Call Details** and metadata exist on the right.

11. (Option) Click the **Download Audio** 🔽 or **Download Transcript** 🔽 icons as required.
This completes the procedure.

**Related information**
Support
Just-in-Time Training Materials

# 5.2. Call Insights & Sentiment Analysis
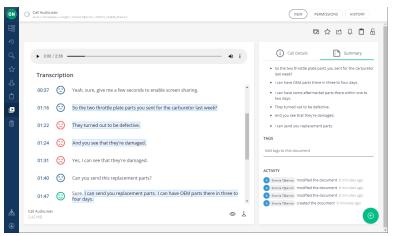


**Figure 5-10 Call Insights & Sentiments**

**Call Insights** is an add-on for the **Onsight Transcription** service . Using **Call Insights** and transcription together, you can build a library of call transcripts that is searchable; provides a summary and sentiments ratings; can augment your existing reports by providing trends; assist with audits; and use Artificial Intelligence (AI) features to reduce the cognitive load.

When **Call Transcription** is enabled for your domain, Onsight Workspace capabilities are enhanced using Natural Language Processing (NLP) and Artificial Intelligence (AI) to provide:

- **Text Summarization** — Provides key highlights that are searchable, save time and improve overall efficiency.

- **Sentiment Analysis** — Provides sentence-level, and full conversation sentiment analysis that can classify sentiments as **Negative** ☹ , **Neutral** 😐 , or **Positive** 🙂 .

> **Note:** Call Insights can function as an automated assessment tool for anyone who is customer facing that wants a high-level summary for the call and an indication for trends by applying sentiment ratings as an indicator for follow-up.

## 5.2.1. Call Insights Requirements

Call Insights requires the same licenses as call transcription. Refer to for specific details. **Client Policy** settings must also be enabled to support call insights.

### 5.2.1.1. Call Insight Client Policy Settings
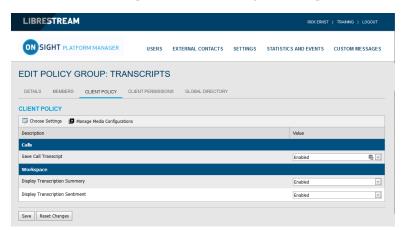


**Figure 5-11 Call Insight Client Policy Settings**

Client Policy settings must first be enabled to support Transcription. Refer . Thereafter, the following settings must be configured for **Workspace**, and **Artificial Intelligence**.

## Workspace

The following **Workspace** settings must be **Enabled** to support **Call Insights**:

- • **Display Transcription Summary**

- • **Display Transcription Sentiment**

## Artificial Intelligence

The following **Artificial Intelligence** settings must be **Enabled** to support **Transcription** and **Call Insights**:

- • **AI Setting** must point to an **AI Setting** configuration that includes a **Transcription API**, **Endpoint**, and **Parameters**.

For assistance in configuring your **Client Policy** and **Artificial Intelligence**  settings, please contact your Onsight Administrator.

## 5.2.2. Call Insights Information



**Figure 5-12 Call Insights, Details & Summary**

When you select a call, you can view transcription information that includes sentiment analysis. For example,

| Transcription | Call Details | Summary |
|---|---|---|
| • **Time** <br><br> • **Sentiments** rating as: <br><br>    ◦ **Negative** ☹ (Red) <br><br>    ◦ **Neutral** 😐 (Blue) <br><br>    ◦ **Positive** 🙂 (Green) <br><br> for each line of text. <br><br> • **Transcription** text with key sections identified using highlights that were used to create the summary. <br><br> ℹ **Tip:** You can use the scroll bar to page-down the page, as necessary. | Click the **Call Details** ℹ icon, as necessary to access call metadata: <br><br> • **Created** Date <br><br> • **Start Time** <br><br> • **End Time** <br><br> • **Last Modified** <br><br> • **Version** <br><br> • **Created By** <br><br> • **Participants** <br><br> • **Sentiment** rating for the entire transcript as **Negative**, **Neutral**, or **Positive** <br><br> • **Tags** <br><br> • **Activity** | Click the **Summary** icon to access the call summary tab that includes: <br><br> • A bullet point extractive summary that is comprised of key phrases from the conversation within the **Transcription** section. <br><br> • A fixed number of bullets can be defined as a parameter within the **AI Setting** file in OPM. |

# APPENDICES

## FIREWALL CONFIGURATION

If Windows Firewall or other third-party firewall software is running on the network where you are attempting to access Onsight Workspace, you can need to add firewall exceptions for the ports listed in Table 6-1 : Firewall Ports *(on page 49)*.

**Table 6-1 Firewall Ports**

| Name | Protocol | Port | Description |
|------|----------|------|-------------|
| HTTPS | TCP | 443 | Required if remote endpoints will access the Web Service interface over TCP port 443. If your IIS configuration uses a port other than 443, ensure that you have enabled that port instead. |

## NETWORK REQUIREMENTS

Onsight software requires HTTPS network protocol to communicate with Onsight WORKSPACE.

**Table 6-2 Network Requirements**

| HTTPS | 443 |
|-------|-----|
| **Browser** | TLS v1.2 support. |
| **Web Proxy** | TLS v1.2 support. Configure as required by your Enterprise's security policy. |
| **Wireless Network** | 802.11 a/b/g/n |
| **Wired Network** | A wired 10/100 Ethernet port is recommended. |

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• https://librestream.com/support-archives/termsofuse

## CONTACT SUPPORT

If you need assistance, please contact support@librestream.com or call **1.800.849.5507** or **+1.204.487.0612**.

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