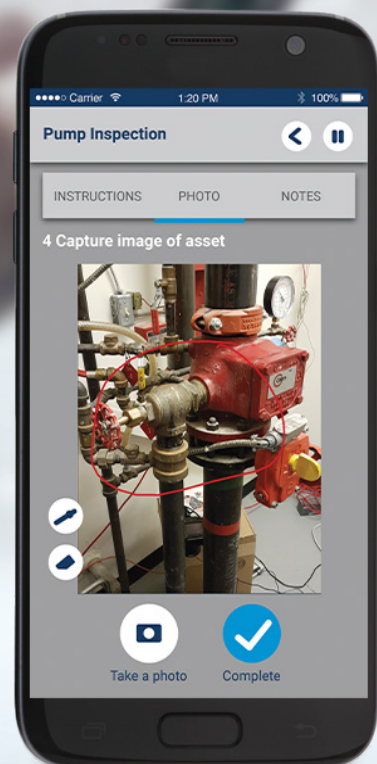


ON SIGHT
FLOW
BUILDER GUIDE



Librestream
Onsight Flow Builder Guide
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Name of Librestream Software Onsight Flow

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OVERVIEW

Onsight Flow Builder enables you to create, edit, save and upload workflows using a simple drag and drop user interface.

A Workflow is your process digitized into a step-by-step template, from which users can create and complete jobs by following the process exactly as required by your business.

The Workflow is built in the Builder by dragging, dropping and connecting steps.

Once a Workflow is built - It is then published to the Onsight Flow Manager. The list of workflows and jobs displays within the dashboard.

The Onsight Flow app connects to Onsight Flow Manager enabling workflows to be downloaded, enabling jobs to be scheduled and completed. As jobs are completed, the data is uploaded to the server and displayed on the dashboard for review.

This document will guide you through creating and uploading Workflows

FLOW SPECIFICATIONS

Flow App

- Android 7.0 or higher
- iOS 12 or higher
- RealWear Devices (HMT-1, HMT-1Z1 & Navigator 500)

Note: RealWear software must be v9.05c+

Flow Builder

- Windows 7.0 or higher
- .NET 4.6.1 or higher

Onsight Flow Manager

- HTTPS 443
- Browser:
 - Internet Explorer 11
 - Microsoft Edge
 - Mozilla Firefox
 - Google Chrome with HTTPS (TLS v1.2 support)
- Web Proxy - configure as required by your enterprise security policy
- Wireless - 802.11 a/b/g/n

ONSIGHT FLOW PLATFORM

Onsight Flow is a process management platform.

A Workflow is your process digitized into a step-by-step instruction template, that enables users to create and complete Jobs by following the process exactly as defined by your enterprise.

The Workflow is built in Onsight Flow Builder by dragging and dropping steps and using connecting lines to define the order and sequence. Once a workflow is built - it is published to **Onsight Flow Manager** (OFM) where it is accessible as a template for completing jobs.

The OFM dashboard enables you to manage all of your Team's users, workflows, jobs, and reports. It stores data captured during jobs for audit and analytics.

The Onsight Flow app connects to the server where workflows can be downloaded. Scheduled jobs are defined, created, and completed from the workflows. As jobs are completed on the app, the data is uploaded to OFM and displayed on the dashboard for review.

Onsight Flow Builder

Onsight Flow Builder enables you to create, edit, save and upload workflows to OFM using a simple drag and drop user interface. Refer to the Onsight Flow Builder guide for details on how to create and upload workflows.

Onsight Flow Manager

Onsight Flow Manager stores your Workflows and job data and enables integration into third-party systems. Your login credentials are sent to you from Librestream. As the account owner, you are granted administrator rights.

Onsight Flow App

The Onsight Flow app enables you to download and complete workflows as jobs. Once a job is complete, the job is uploaded to the OFM dashboard.

ONSIGHT CONNECT

Onsight Connect can be used in conjunction with Onsight Flow when additional collaboration is required during a job. Onsight Connect can be launched from the Onsight Flow app by pressing the **Call** button at any time during an active job.

Onsight Flow and Onsight Connect require separate user accounts. They are managed by Onsight Flow Manager (OFM) and Onsight Platform Manager (OPM) respectively.

OPM is the central management server for Onsight Connect users. All Onsight Connect user licenses and policies are controlled by OPM. This includes access to Workspace.

When Onsight Workspace is enabled, users can upload their content directly to Workspace as an archive, knowledge base and workflow repository.

For more information on the full Onsight Flow and Onsight Connect capabilities, access the ['Just-in-Time' Training Materials](#).

INSTALL

To install Onsight Flow Builder, navigate to Librestream's [Support](#) page. Locate **Onsight Flow** → **Administrators and Editors** → **Downloads & Updates** section. **Download the Onsight Flow Builder** and run the setup file. When installed, navigate to the **Start Menu** and locate **OnsightFlow** → **Onsight Flow Builder**. Alternatively, you can also launch **Onsight Flow Builder** from the desktop shortcut.

CREATING WORKFLOWS

To create, edit and publish workflows, you must have Onsight Flow Builder permissions granted to your Onsight Flow account. The Builder does not require you to enter login credentials until you upload workflows to the OFM.

CREATING A NEW WORKFLOW

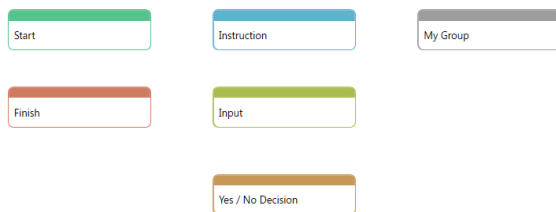
- Open the Onsight Flow Builder application and select **New Workflow...**
- Enter the details of your workflow (these can be changed any time during the workflow creation process).
 - **Name**
 - **Author**
 - **Description**
 - **Directory**
- Click **Create**.

EDITING AN EXISTING WORKFLOW

To edit existing Workflows, download the Workflow file (.zip format) from Onsight Flow Manager. Once you have downloaded the Workflow zip file, select File-Import from Zip. The Builder will open the workflow, and you will be able to make changes to it and publish an update to the server.

WORKFLOW STEPS

A workflow is created by dragging and dropping step components from the Toolbox onto the Builder canvas and connecting each step in sequence to specify the order of steps.



A workflow will always have a **Start Step** and a **Terminator** step (Finish) to specify the start and end of the workflow. Workflows can contain multiple **Terminator** Steps.

Begin by adding steps. In between each step, draw a connecting line to join two steps in sequence with a connecting arrow. Place your cursor over the Step to view its connector nodes (rectangles). Click and drag to draw a connecting line by extending its arrow and dropping it on the Step to which you wish to link it to.

Click on steps and drag to position them on the workflow canvas.



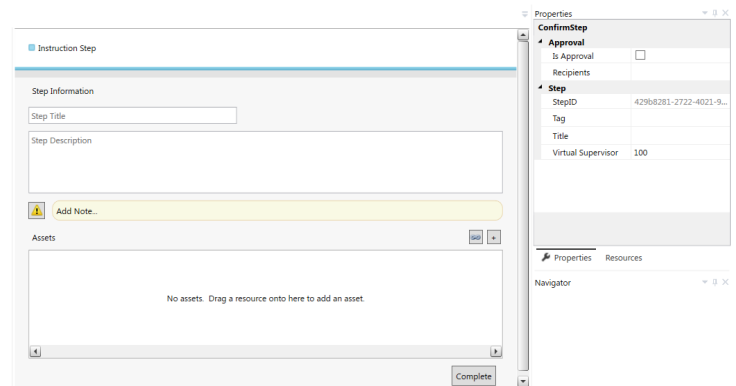
Select a connector node and press delete to remove the connection between two nodes.

To edit a step, double click the step on the canvas to access and edit its **Properties**. Press the **Complete** button to return to the canvas.

INSTRUCTION STEP

An Instruction step does not require any input from the user. It displays information that the user must acknowledge.


Instruction steps enable you to add a **Step Title**, **Step Description** and **Assets**. A step asset is any file type that is supported by the device that the workflow is being executed with.



The screenshot shows the 'Instruction Step' configuration window. It has fields for 'Step Title' and 'Step Description'. Below these is an 'Add Note...' button. There is an 'Assets' section with a message 'No assets. Drag a resource onto here to add an asset.' and a 'Complete' button at the bottom right. On the right side, there is a 'Properties' panel for 'ConfirmStep' with fields for 'Is Approval' (checkbox), 'Recipients', 'StepID', 'Tag', 'Title', and 'Virtual Supervisor'.

The **Step Title**, **Step Description** and any attached **Assets** are displayed within the Onsight Flow App when a user starts the workflow and enters the step.

ADD A LINK

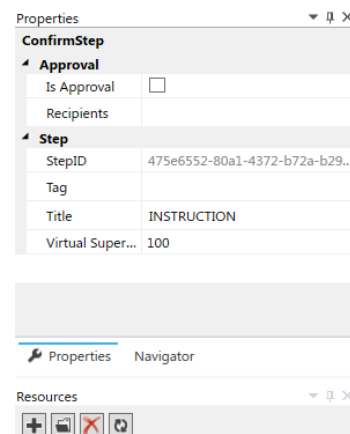
As well as adding assets, you can click the **Add Link**  button above the **Assets** window to insert external links as a resource by entering the details for your link.

WARNING NOTE

An instruction step, just like any other step, enables you to add a warning **Note** that displays when the user enters the step.

STEP PROPERTIES

Properties define additional workflow behaviors and resources.



The screenshot shows the 'Properties' panel for a 'ConfirmStep'. It has sections for 'Approval' (with 'Is Approval' checkbox and 'Recipients' field) and 'Step' (with 'StepID', 'Tag', 'Title', and 'Virtual Super...' fields). Below the properties is a 'Resources' section with icons for adding, deleting, and refreshing resources.

REQUIRES APPROVAL

This property enables you to change an **Instruction Step** into an **Approval Step**. This means that when a user enters this step at any point during the workflow, they will have to request an approval to be able to continue. The job will be paused until approval is granted.

To enable this feature, select the **Is Approval** property and add a list of email addresses or phone numbers of those who will be the **recipients** of the approval request.

Once a user requests an approval, the recipients will be notified via email and SMS that their approval is required. This will enable them to either follow a link or access the Job via the Admin Dashboard to view the job details and respond to the request.

The approval request can then be **Approved** or **Declined**. A notification is sent to the OnSight Flow App user. This enables them to continue if the request has been approved or alter their work based on the feedback and re-send the approval request again.

Note: This feature (Requires Approval) has been deprecated.

VIRTUAL SUPERVISOR

A **Virtual Supervisor** step is a step that will appear based on a percentage that is defined within the Builder. This may be used when a step is not required every time a job is completed but must be performed occasionally, e.g., 10% of the time you want to request approval before the job is completed.

All step types are assigned a **Virtual Supervisor** percentage value.

The **Virtual Supervisor** percentage can be changed in the step **Properties** window - Simply enter the percentage value (%) that this step should appear in the workflow.

If the value is set to below 100%, then the step will appear based on the percentage provided. E.g., entering 50% will display this step every second time that the workflow is run.

Note: This feature (Virtual Supervisor) has been deprecated.

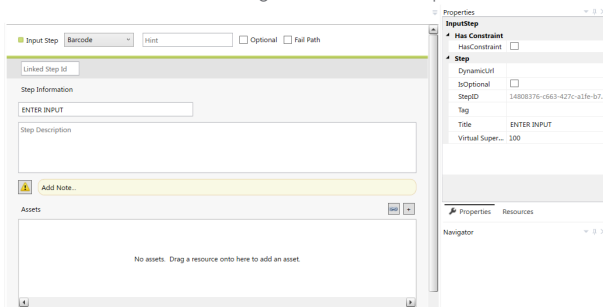
RESOURCES

You can add file assets to any step. These will be displayed to the user completing the step. You can add files to the **Resources** window in the Builder, and simply drag the resources to attach them to the required step.

INPUT STEPS

An Input step supports the same step properties as an Instruction step, but in addition also asks for the user to enter an input.

A user will be requested to enter the required input to continue. Each input can be further customized with validation options - i.e., character limits, numeric range or selection options.



INPUT TYPE

To specify the type of input for the step, select the input from the drop-down menu list that appears. Refer to INPUT STEP TYPES.

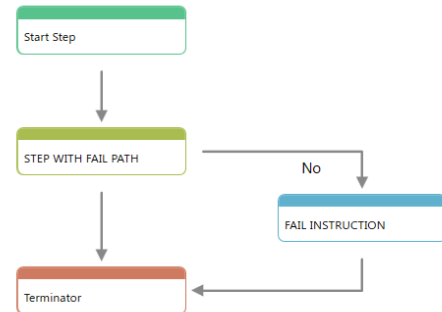
OPTIONAL

Each input step can also be made optional by selecting the **Optional** or **IsOptional** check boxes in the step **Properties**. This means the user can complete the step without an input and will not be given a warning message.

FAIL PATH

Fail Paths are available for any step that defines a range e.g.,

Numeric, Text, Date/Time. This means if the input validation fails (i.e., the user does not take a photo, or enters a number outside of the specified range) the user will be taken down the fail path.



To set the fail path, enable the **Fail Path** check box option for the step.

In the main workflow Canvas window:

- Hover your mouse over the step where you want to add a connecting line. Typically, this is the midpoint of the line. Four square nodes should highlight for each step.
- Click to drag and draw a connection line for the Fail Path from one node to another step.
- Hover the mouse over the destination step until the square connection nodes appear and finish dragging the line to one of the nodes.
- Double-click the connection line to modify the text. Verify that the text is set to **No** by clicking on the connector arrow and selecting the connection type from the drop-down menu.

Tip: You can specify that the user should go to a different step if the input validation fails.

INPUT STEP TYPES

ANNOTATION INPUT

Requires a user to annotate the image provided on the step. It requires that you upload an image in the step **Assets** section and select the image from the **Annotation Asset** drop-down menu.

Note: This feature has been deprecated.

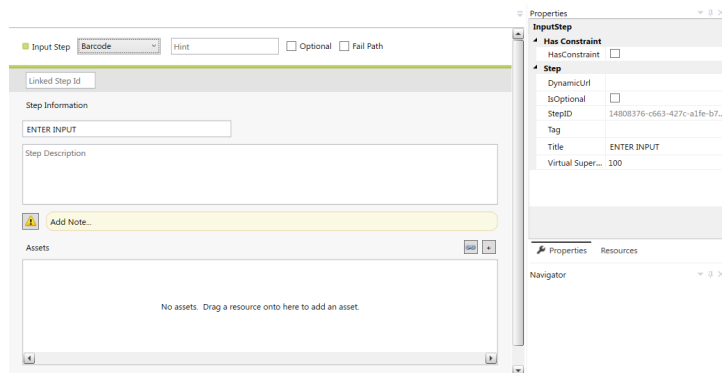
AUDIO INPUT

Requires a user to record audio to complete the step. The user must grant the Flow app permission to access the microphone on their device.

Note: This feature (Audio Input) has been deprecated.

BARCODE INPUT

Requires a user to enter a barcode in the input box.



To complete the step, a user can:

- Enter the barcode manually - by entering text in the input box.
- Use a barcode scanner - either with an internal device barcode scanner, or a paired Bluetooth scanner.
- Click the **Scan Barcode** button and scan a barcode using the device camera.

Note: Radio-frequency Identification (RFID) tag scanning is supported and Quick Response (QR) codes can also be scanned using the camera or barcode scanners.

The **Linked Step Id** field enables you to link the barcode input with a numeric step, which will enable a user to update the number value by scanning the same barcode. Add the numeric step Id to the field - this will link the steps together.

Note: In order for the steps to be linked, you must enable the **Form View** option as a property for **Group Steps**. Refer to "FORM VIEW" on page 8.

Note: This feature (Barcode Input) has been deprecated.

DATE/TIME INPUT

Requires a user to select a date and/or time from a date/time selector.

Options include:

- Enabling a **Minimum** and **Maximum** date range
- Enabling the **Display Date** and **Display Time** check boxes ON or OFF. This controls whether a user must enter the date, time, or both.

FILE INPUT

Requires a user to upload a file from the device file library.

Note: This feature (File Input) has been deprecated.

NUMERIC INPUT

Requires a user to enter a numeric value in the input box.

Options: Setting the **Minimum** and **Maximum** values for the range.

The numeric input also has an option for **Quantity Buttons**, which will give the user a **Plus (+)** and **Minus (-)** button to adjust the value.

PHOTO INPUT

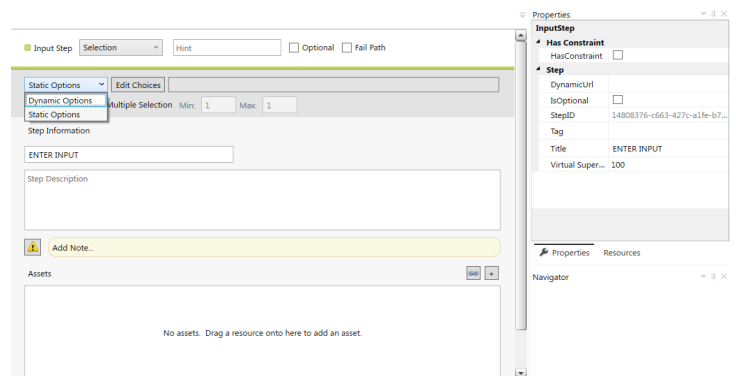
Requires a user to take a photo or upload an image from their device library. Once a photo is taken, or an image has been selected, it can be annotated using the annotation tool. library. Once a photo is taken, or an image has been selected, it can be annotated using the annotation tool.

Tip: The user must grant the Flow app permission to access the camera on their device.

SELECTION INPUT

Requires a user to select items from a defined list. Selection steps can be defined as single or multiple selection.

For multiple selections, you must specify the **Minimum** and



To define a Static list:

- Select **Selection** as the Input Step.
- Select **Static Options** for the list items.
- Press **Edit Choices** to add the items to the list of the step. Each item should be added on to a new line.

Note: This feature (Selection Input) has been deprecated.

Dynamic Selections

Requires that you point to a database Uniform Resource Locator (URL) from which to retrieve the list. This enables your workflow to access up to date values as they are updated in the database.

To configure Dynamic Selections:

- Click **Selection** from the Input Step drop-down menu.
- Select **Dynamic Options**.
- Enter the URL of the database from which the list items will be requested. You may also enter the URL in the **DynamicURL** field under Step Properties.

Refer to the **Dynamic Selections** or details on setting up the database.

Note: This feature (Dynamic Selections) has been deprecated.

SIGNATURE INPUT

Requires a user to enter their signature on the provided signature pad.

TEXT INPUT

Requires a user to enter text in the input box.

Options:

- Setting the type of text input required. Options include:
 - None** - accepts any text.
 - Email** - must be a valid email format.
 - URL** - accepts any URL format.
- Enabling length check.
 - Setting the **Minimum** and **Maximum** character length.

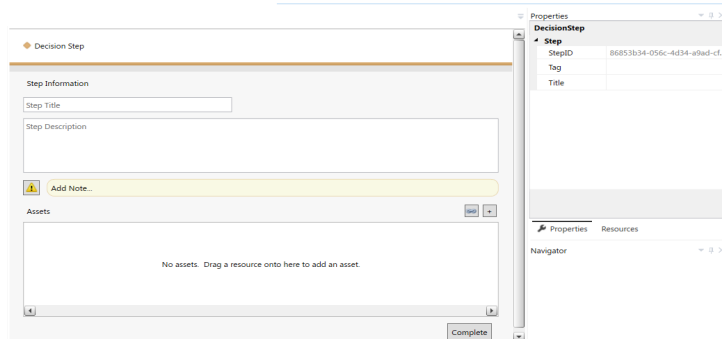
VIDEO INPUT

Requires a user to record a video. The step will include a title with instructions and a **Record** button. The user must press the **Record** button to initiate video capture.

Tip: The user must grant the Flow app permission to access the camera on their device.

DECISION STEPS

A decision step supports the same step properties as an Instruction step. However, it enables the user to select a decision in order to determine which path in the workflow to go down next.



DECISION OPTIONS

A decision step can have between 2 and 3 decision options, which means a decision step can have between 2 and 3 connection paths leading to different steps.

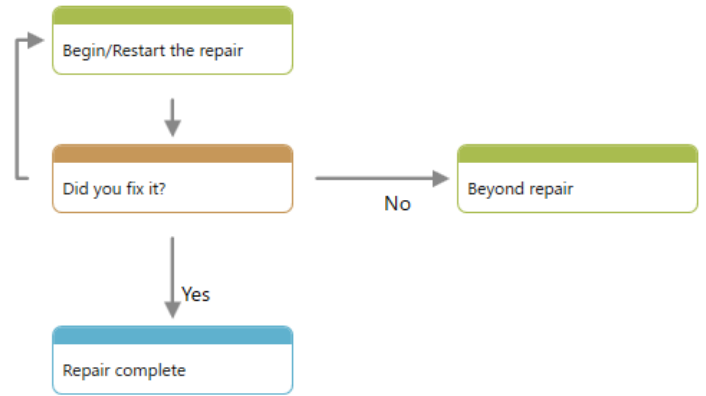
To specify which decision should use which path, connect the arrows from the decision step to the relevant steps, and specify the connection type by double-clicking the connector arrow and typing within the field:

- Yes**
- No**

Each of the decision option titles can be modified, as required.

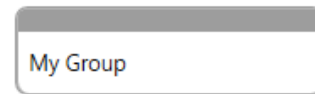
CONNECTION PROPERTIES

Enter the title for each of the connections you applied: **Yes**, **No**, and other text, as necessary. These will appear as a workflow option for the user when the step is displayed.

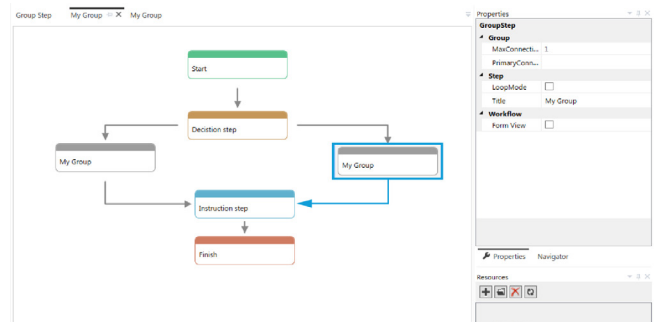


GROUP STEP

Group steps are an important component of building complex workflows. A Group step enables you to combine steps together to act as an embedded workflow inside of your main workflow. When creating a workflow, add the group step to your canvas then click on it to open the **Group Step** canvas in your main workflow.



Complex workflows can be created containing several group steps that enable you to address multiple situations in one workflow. Group steps can also be nested enabling you to create workflows that are several layers deep.



Note: Each child group step must be terminated internally before further connections can be applied to the parent group step.

FORM VIEW

Form View is an option in the Group step **Properties** that display all the grouped steps in a list view on the OnSight Flow App.

This means that all of the steps will be shown as a list, and all will need to be completed on the same page. This is useful for grouping and displaying related steps together.

LOOP MODE

If you would like users to be able to submit the form multiple times, select the **LoopMode** option in the properties window.

This means that users will have a **Next** option in addition to

Complete which will submit your form and give you a new one to complete instead of proceeding to the next step.

WORKFLOW VALIDATION

In order for the Workflow to be successfully executed by Onsight Flow, the workflow must not contain any errors.

When the workflow is validated, the Errors and Warnings window will list any steps that may need attention.

If the workflow contains errors, a red X will be displayed. The workflow cannot be published until the errors are fixed. The description of an error will give you information about how to fix it.

If the workflow contains Warnings, the steps will have a yellow exclamation mark displayed on them. The workflow can still be published when a step contains a warning.

Note: If a workflow contains errors after you have made corrections, press the **Validate Workflow** button to update the Error/Warning status panel.

WORKFLOW PUBLISHING

Once a workflow is complete, it is ready to be published for your Team. You can choose to upload it as a new workflow or update an existing one.

To publish directly to the server, select **File → Publish to Server** in the Builder. Use your Team Name and credentials to login.

Enter your Onsight Flow credentials (you must have Onsight Flow Builder permissions).

You can choose to update an existing workflow from the drop-down menu.

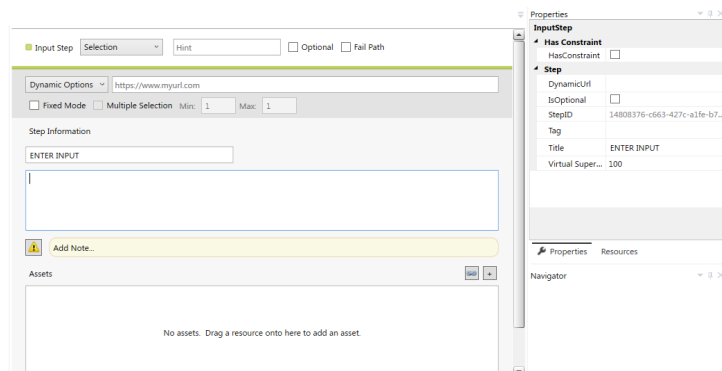
Or select to publish a New Workflow.

Alternatively, you can export your workflow to a Zip file by selecting

File → Export to zip and save the Workflow zip file locally. This will enable you to upload it to the server manually.

DYNAMIC SELECTIONS

Dynamic selection steps request the list of selections for an input step from a database, thus always giving the user up to date live information.



When using the Dynamic Selection system, the Onsight Flow client will `POST` to an URL defined within the **DynamicUrl** field of `MultiChoiceParameter` as it is defined in the Input step's properties.

This URL will be hosted by the client and will receive the full job instance in JavaScript Object Notation (JSON) and will return the valid items for the selection step.

Response Codes

- `200` - OK

RESPONSE

The response received by the server will contain an array of `choices` whereby each choice is represented as a dictionary. The dictionary will support 2 formats: one with a key/value pair(`Dictionary←string, string→`) and one with a key/object pair (`Dictionary←string, object→`).

Key/Value

The `key` is the unique value that will be posted by the Onsight Flow client as the Input from the selection step. The `value` is the friendly name to be displayed to the user in the selection User Interface (UI).

```

    "choices": {
        "choicea": "Choice A",
        "choiceb": "Choice B"
    }

```

KEY/OBJECT

The `key` is the unique value that will be posted by the Onsight Flow client as the Input from the selection step. The object will contain 2 properties: `value` and `detail`. `value` will be displayed in the dynamic drop-down and `detail` will be shown underneath the selection control on screen.

```

{
    "choices": {
        "key1": {
            "value": "Value 1",
            "detail": "Value 1 detail"
        },
        "key2": {
            "value": "Value 2",
            "detail": "Value 2 detail"
        }
    }
}

```

Note: This feature (Dynamic Selections) has been deprecated.

CONTACT SUPPORT

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