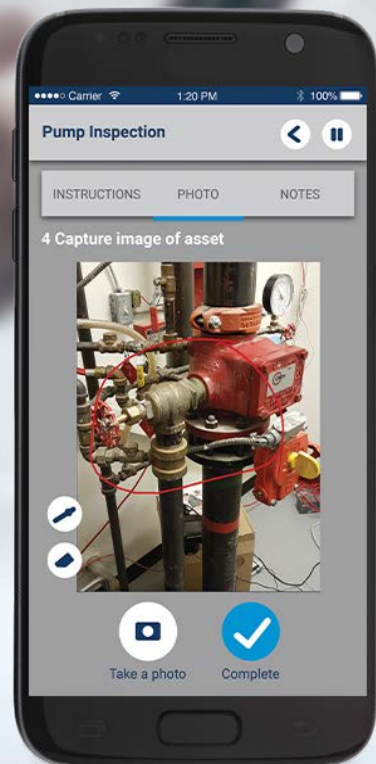


ON SIGHT
FLOW
ADMIN GUIDE



**Librestream
Onsight Flow
Admin Guide
Doc #: 400346-00, rev.A**

November 2018

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Name of Librestream Software Onsight Flow

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OVERVIEW

Onsight Flow helps you transform your paper-based processes into digital work instructions for enterprise-grade wearables, smartphones, or tablets. Your teams can rely on step-by-step instructions or digital forms that include access to relevant content, simplified data capture, and digital sign off procedures.

Onsight Flow Manager is the secure online platform for you to manage your teams, workflows, jobs, and store data for audit and analytics.

This document will guide you through the initial set up of Onsight Flow. The key concepts to understanding Onsight Flow are as follows:

A Workflow is your work process digitized into a step-by-step template. Users can complete jobs by following the process exactly as defined by your Workflow.

The Workflow is built using the Flow Editor (Windows PC) 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 is displayed on the dashboard.

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

FLOW SPECIFICATIONS

Flow App

- Android 5.0 or higher
- iOS 10 or higher

Flow Editor

- Windows 7.0 or higher
- .NET 4.5 or higher

Onsight Flow Manager

- Google Chrome
- Microsoft Edge
- IE 11
- Firefox

Onsight Flow Manager

- HTTPS 443
- Browser:
 - Internet Explorer 11
 - 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
- Wired - 10/100 Ethernet port

ONSIGHT FLOW PLATFORM

This section describes Onsight Flow as a process management platform.

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 defined by your enterprise.

The Workflow is built in the Editor by dragging, dropping and connecting steps. Once a Workflow is built - it is published to the Onsight Flow Manager (OFM) where it is now available as a template for use in completing jobs.

The OFM dashboard allows 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 from which 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 Editor

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

Onsight Flow Manager

The Onsight Flow Manager stores your Workflows and job data and allows integration into 3rd 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 allows you to download and complete workflows as jobs. Once completed, the job is uploaded to the admin 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 anytime 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.

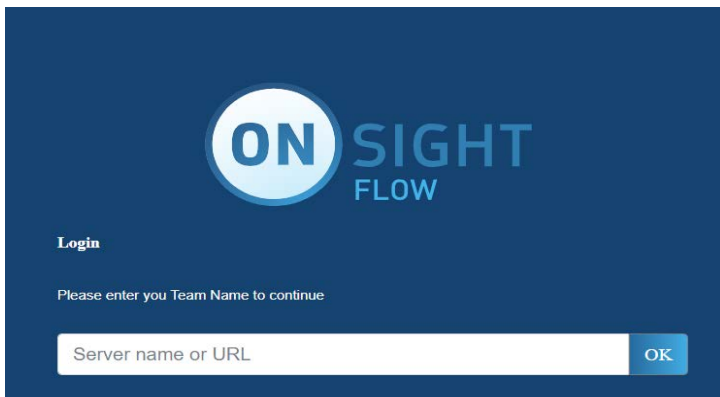
When Onsight WORKSPACE is enabled, users can upload their content directly to WORKSPACE as an archive, knowledgebase and workflow repository.

For more information on the full Onsight Flow and Onsight Connect capabilities, access online training at <https://onsight.librestream.com/>.

LOGIN

Onsight Flow Manager access is granted to the Onsight Flow account owner by Librestream. You will receive your Administration login information from Librestream via an email.

- To log in to Onsight Flow Manager, open a browser and navigate to the login page, <https://login.flow.librestream.com>.
- Enter the team name provided to you by Librestream, e.g., mycompany.
- You will be redirected to your login page:
 - Enter the **user name** and **password** provided to you by Librestream.
 - It is good practice to change this password immediately after logging in for the first time, as described in Changing the Administrator's Password section
- After successfully logging in, you will be taken to the OFM admin dashboard.



ADMIN DASHBOARD

The Admin Dashboard provides access to the following features:

- Menu:
 - ON button – press to return to dashboard
 - Workflows
 - Calendar
 - Jobs
 - Settings
 - Logout
- Dashboards
 - Popular workflows (past 24 hours)
 - All jobs chart
 - Jobs completed today (past 12 hours)
 - Create a widget (tutorial)
- Feedback



TIP: You can customize your dashboard by creating your own widgets. View the tutorial in the Create a Widget window.

ADMINISTRATOR SETTINGS

To manage your Onsight Flow administrator (owner) account, go to Settings-My Account:

CHANGING THE ADMINISTRATOR'S PASSWORD

- Choose Settings → My Account.
- Press **Reset Password**.
- Enter the **Old password**.
- Enter **New Password**.
- Enter your new password again in **Confirm Password**.
- Click the **Update** button to save your changes.

SET THE PHONE NUMBER

To set the account owner's phone number:

- Choose Settings → My Account.
- Press **Set Number**.
- Enter your Phone Number.
- Press **Next**.
- Enter the Verification Code you received by SMS message.
- Press **Next**.
- Your phone number is now authenticated

ENABLE TWO-FACTOR AUTHENTICATION

Two-factor authentication requires either a confirmed email or phone number to be associated with administrator accounts. When an administrator attempts to log in, they will receive a security code via either email or by phone. They must enter the security code in addition to their username and password in order to gain access to Onsight Flow Manager.

- Choose **Settings** → **My Account**.
- Enable **Two-Factor Authentication**.

TEST NOTIFICATION

Two-factor authentication requires either a confirmed email or phone number to be associated with administrator accounts. To test the configured contact information:

- Press **Send Test Notification**.
- A test message will be sent to the confirmed email and phone number for the owner account.

LOGOUT

Press Logout to exit and return to the Login screen.

MANAGING USERS

USERS

There are four types of users that can access the Onsight Flow platform.

Owner - this is the primary account for your Onsight Flow Manager server, there is only one account owner. The designated account owner has full access to Onsight Flow Manager. The account owner has administration permissions and can create other administrator accounts.

Admin - has full access to the Admin Dashboard, can upload Workflows, view Jobs, create users, and has user permissions to access the Flow app. Only the account owner can create administrator accounts.

User - can access the Onsight Flow app, can access Onsight Flow Manager to view their jobs, access their calendar, and reset their password.

Editor - has access to the Flow Editor and can create, edit and publish workflows to Onsight Flow Manager using the Editor or the OFM dashboard.

GROUPS

There are two types of groups: System and Non-system.

The **System group assignment** of a user determines the system permissions they are granted. The choices are Admin, Editor and User.

Non-system groups are created by an Onsight Flow administrator and assigned to users but they are logical groups only. They do not imply permissions or privileges. Non-system group members get their permissions from their System group assignment (owner, admin, editor or user).

Users can belong to multiple System and Non-system groups.

Note: The Onsight Flow group assignment is not related to the Onsight Platform Manager group assignment. They are managed separately by each service.

HOW TO ADD USERS

- Choose Settings → Users.
- Click the Add button.
- Enter a Username, Email address, Password, and then Confirm password.
- Assign the group* memberships for the user from the available Groups: Admin, Editor, User and/or any non-system groups.
- Press Add user.

*The System group assignment determines the permissions granted to a user.

NOTIFYING USERS

As an administrator, you will need to notify new users with details of their user credentials and instructions on how to download, install and log in to the Onsight Flow app.

This must include:

- Team name
- Username
- Password
- Login page URL
- Download and install instructions for the Onsight Flow app

Librestream can supply an email template with the Onsight Flow download and install instructions.

CHANGING A USER'S PASSWORD

To change a User's Password:

- Go to **Settings**.
- Select a User.
- On the User details panel under Account security, press the **Change password** button.

LOCKING/UNLOCKING A USER'S ACCOUNT

To lock/unlock a User's Account:

- Go to Settings.
- Select a User.
- On the User details panel under Account state, press the **Lock/Unlock** button.

MANAGING GROUPS

When users are first created in the system, they must be assigned a system group which determines their user permissions. You may also wish to create non-system groups and assign users to them in order to logically manage job scheduling based on your enterprises' existing user management system.

Non-system groups do not have system permissions associated with them. They are logical groupings. For example, you may wish to group users based on location or department. Jobs can be assigned to groups so that all members of a group are tasked with a specific job to complete.

Users may belong to multiple system and non-system groups.

CREATING NON-SYSTEM GROUPS

- Go to Settings-Groups.
- Press Add.
- Enter the group name.
- Press Create group.

Remember, the System group assignment determines the permissions granted to a user. Non-system groups are for logical user groupings.

ADDING USERS TO GROUPS

- Go to Settings-Groups
- Press the → beside the group name
- Press Manage on the group panel
- Select the checkbox beside each user you wish to add to the group. They will be automatically added to the group.

USERS DETAIL PANEL

From the Users Detail Panel:

- Users may be added to groups by pressing the Groups + button.
- Users may be locked from access to the app, editor and OFM.
- Users may change their email address.

WORKFLOW MANAGEMENT

What is a Workflow?

- 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 defined by your enterprise. Refer to the Flow Editor Guide for details.
- The Workflow is built in the Editor by dragging, dropping and connecting steps. Once a Workflow is built - it is published to the Onsight Flow Manager (OFM) where it is now available as a template for use in completing jobs.
- The Onsight Flow app connects to the server in order to download workflows. 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.

What are Steps?

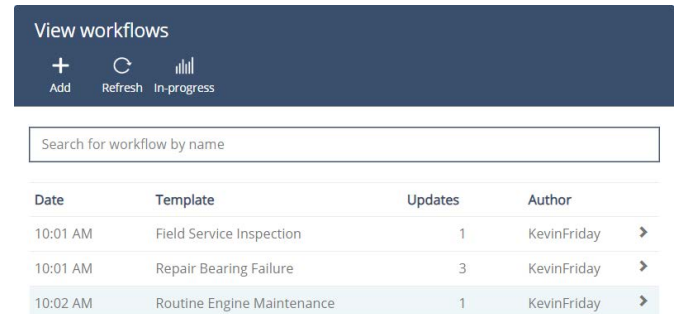
- Steps are instructions that are linked together in a logical sequence to define a Workflow template. The steps include tasks to perform and can include information to gather by using the various input types. Steps can include supporting documents to help team members complete their job. For example, a repair manual or diagram may be included in a step.

What is a Job?

- A Job is the process of completing steps which includes performing tasks and gathering data as defined by a Workflow template.

VIEW WORKFLOWS

Press the Workflows button to view the Workflows page. It lists all of the workflows that have been uploaded to OFM.



Date	Template	Updates	Author
10:01 AM	Field Service Inspection	1	KevinFriday
10:01 AM	Repair Bearing Failure	3	KevinFriday
10:02 AM	Routine Engine Maintenance	1	KevinFriday

ADDING WORKFLOWS

Workflows that have been saved locally on your computer may be uploaded by pressing the Add + button and selecting the file.

- Press **Add +**.
- Press Select file: +.
- Select the workflow zip file in the Open dialog window.
- Press **Open**.
- Select the Workflow status from the **Upload** as dropdown list. You may choose Live/Active, Draft, Alpha, or Beta.
- Press **Start upload**.

Workflows may be uploaded directly from the Flow Editor to OFM.

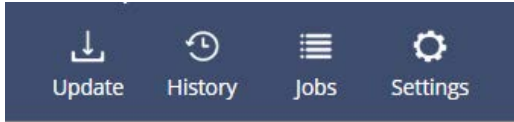
- Select **File-Publish to Server**.
- Enter your login credentials and press **Login**.
- Confirm the Workflow Properties and press **Publish**.
- Confirm the **Overwrite** dialog when updating and press **OK**.
- Press **OK** to dismiss the **Publish Successful** confirmation dialog.

WORKFLOWS - IN-PROGRESS

Press the In-progress button to see a list of workflows completed in the last 24 hours.

EDITING A WORKFLOW

As an administrator you can view further control who can access the workflow and how the workflow behaves upon job completion. Clicking on a workflow will open the Workflow details panel where you can **Update** the workflow, view **History**, view **Jobs**, and **Settings**. Click on the workflow title to access its details.



UPDATE

Clicking on a **Update** will open the Upload workflow panel where you can upload an update to the workflow template.

- Press Select file + and browse to the workflow template you wish to upload.
- Select the file status under in **Upload as** drop-down list.
- Press the **Start upload** button.

HISTORY

Clicking on a **History** will open the Workflow History panel where you can view the upload and update history of the workflow template.

Click on any of the list items to view its Update details.

JOBS

Clicking on **Jobs** will open the Workflow jobs panel where you can view jobs that have been completed based on the current workflow template.

Click on any of the listed jobs to view its details.

WORKFLOW SETTINGS

Click on **Settings** to open the Workflow settings panel and configure the following for the Workflow:

- **Reporting**
- **Permissions**
- **Triggers**
- **Custom Id**

These settings control the report templates, group access, triggers and Custom IDs used when a job is completed.

SETTINGS - REPORTING

Click on Settings to open the Workflow settings panel and configure the following for the Workflow template:

- Select the **Report template** to use for completed jobs.
- Enter the email addresses of the **Report recipients** that should receive the report.
- Select the Email format in which the report should be sent.
- Press **Update** to save your changes.

SETTINGS - PERMISSIONS

Use the **Permissions** drop-down list to select the groups and users that have access to the workflow.

- From the drop-downlist, select the groups and users that you wish to grant access to the workflow.
- Press the **X** beside any groups and users to remove them from the list.
- Press **Update** to save your changes.

SETTINGS - TRIGGERS

Use the **Triggers** drop-down list to select the trigger to execute when the job is complete.

- From the drop-down list, select the trigger that you wish to execute.
- Select **None** from list if you wish to remove the trigger.
- Press **Update** to save your changes.

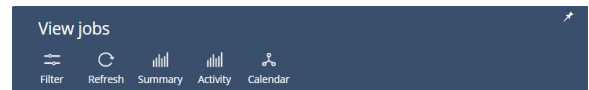
SETTINGS - CUSTOM ID

Use the **Custom ID** drop-down list to select the Custom ID table to assign IDs from when a job is complete.

- From the drop-down list, select the table from which you wish to assign IDs.
- Select **None** from list if you wish to remove the table.
- Press **Update** to save your changes.

JOBS

The Jobs page lists all the jobs assigned to your Onsight Flow team. You can filter the list of jobs by name, user or status.



- Press **Filter** to select the job status: All, Completed, In-progress, Paused or Aborted.
- Press **Refresh** to update the list.
- Press **Summary** to see a Job chart based on Job status.
- Press **Activity** to see a list of completed jobs in the last 12 hours.
- Press **Calendar** to see a calendar of scheduled jobs or to schedule a new job.

JOB DETAILS

Clicking on a job will open the Job details panel where you can view the status, steps and data. Click on the step title to access its details.

You can download the completed jobs details in the format of your choice.

SCHEDULING A JOB

To schedule a new job:

- Press **Calendar** on the Menu.
- Press **New +**, the **Add Entry** panel will appear.
- Select the **Workflow**.
- Enter a **Job Name**.
- Enter a **Job Description**.
- Select the **Start** and **End time** for the job.
- Enter the **Recipients** of the job – select users or groups.
- Optionally, you may select a **Schedule**. This will create a recurring job based on Never, Daily, Weekly, Monthly or Yearly. When Never is selected, the job will be scheduled once based on the entered start and end time.
- Press **Create job**.

Once a job is scheduled, the assigned recipients will be notified via Email and/or SMS. When they log in to the Flow app, they will see the Job listed on the Scheduled page. The user will also be notified of any edits made to the scheduled job.

Job Notification

When the job is scheduled to begin, it will pop up a notification in the Flow app.

TRIGGERS

A Trigger can be used to send data to an external system once a job has been completed. There are two types of triggers:

- URL Triggers
- Executable files Triggers (On Premises installations only)

URL TRIGGERS

A URL Trigger can update an external system by using a URL Post request. This allows an external system to receive data from OnSight Flow.

These triggers do not support authentication and are sent anonymously using the POST method. The body of the call contains a JSON representation of a Flow job encoded as application/json with UTF-8 encoding.

If the Flow server is hosted on-premise or within a private cloud, these links could exist within an Intranet, assuming that it can be accessed via the server.

EXECUTABLE TRIGGERS

When hosting Flow on-premises, an Exe trigger can be used. This is a Win32 executable that is loaded onto the server which contains some custom logic. Flow will compile a CSV file of the job data and will send it as a parameter to the Exe Trigger.

Note: The .exe files are executed by IIS using the same privilege as Flow. If elevated permissions are required, consider using a service which is triggered by an exe or running the web app using impersonation.

SETTING UP TRIGGERS

Only Administrators may configure triggers:

- Navigate to Settings-Triggers.
- Click **Add**.
- Enter the required fields:
 - Name
 - Description
 - Type – HTTP POST or EXE
 - File/URL – trigger location

ASSIGNING A TRIGGERS

Once a trigger has been created, it can be assigned to a workflow template. Whenever a job is complete, it will call the associated trigger.

- Navigate to a Workflow.
- Click **Settings**.
- Go to the **Triggers** section.
- Select the **Trigger** from the dropdown list.

TESTING TRIGGERS

When a trigger has been assigned, it will automatically be called when a job completes. Follow these steps to test that the trigger is operational:

- Navigate to **JOBS**, find a complete job that used a workflow with a trigger.
- Select **Download** → **Regenerate**.

The regenerate command will call the triggers and handle the email reports (if set).

View the Activity Log/Error Log to see if any errors have occurred.

HANDLING TRIGGER ERRORS

A trigger will attempt to run up to 10 times. The retry time is adjusted on a sliding scale from 1 minute for the first retry to several hours for the final retry. Therefore, the system will try for several days to execute the trigger.

In the case of URL Triggers, the POST request must return a 2xx Success Code or the system will force a requeue.

CUSTOM ID

Jobs can be assigned friendly ID's for unique identification after a job is completed. There are 3 methods used to create IDs, file import, form or rule generation.

CREATING CUSTOM ID TABLES

- Go to **Settings-Custom ID**.
- Click **Add +**.
- Choose the add method:
 - CSV or TXT file import
 - Click the **Import** button.
 - The file being uploaded should contain an ID on each row (TXT) or each ID should be separated by a comma (CSV).
 - Enter the table name and description.
 - Select the upload method: **Upload** or **Online**.
 - For Upload, select the file and press **Upload**.
 - For Online, select **Link** or **Dropbox**. Enter the URL or select the file from Dropbox.
 - Form – enter the IDs manually.
 - Click the **Form** button.
 - Enter the table name and description.
 - Enter each ID on a row in the **List of ID's** text box.
 - Press **Done**.
 - Generate ID's based on Rules.
 - Click the **Rules** button.
 - Enter the Table name and description.
 - Enter a **Prefix**. (Optional)
 - Enter a **Suffix**. (Optional)
 - Enter the **Start** value.
 - Enter the **Count**. (Maximum)
 - Press **Preview** to see a list of IDs based on your criteria.
 - Press **Done** to save the list.

You may edit a table or archive a table to remove it from actively being used.

ASSIGNING CUSTOM ID TABLES

Once a table has been created, it can be assigned to a workflow template. Whenever a job is complete, it will be assigned an ID from the table.

- Navigate to a Workflow.
- Click **Settings**.
- Go to the **Custom ID** section.
- Select the **Table** from the dropdown list.

EDITING CUSTOM ID TABLES

- Go to **Settings-Custom ID**.
- Select a Custom ID table in the list.
- Press **Add +** to manually add a row.
 - Enter the **Entry ID** and select the **Table position** for the new entry.
 - Press **OK**.
- Press **Remove X** to delete an ID from the table.
 - Select an ID row and press **Remove Selected**.
 - Press **Remove all** to delete all IDs from the table.
- Press **Import** to import IDs into the table.
 - Use one of the listed add methods to import the new IDs.
- Press **Edit table** to edit the table name or description.
 - Press **Update** to save the changes.
- Press **Assigned** to view a list of IDs that have been assigned to jobs.
- Press **Archive** to deactivate the table and prevent further assignments of the IDs.

APK MANAGEMENT

Onsight Flow Manager provides the ability to store APKs (Android Packages) for easy access. This will allow for downloading the APK from the dashboard or from the built-in Anonymous API. This feature allows you to provide a private link for downloading the APK to users via your private web pages.

Typically, you would provide access to Android APKs that are required for your job instructions to be completed. Android devices must be configured to allow APK installations from unknown sources other than the Google Play Store.

UPLOADING APKs

- Go to Settings-APK Management.
- Press Upload.
- On the Upload APK panel, press Select File +.
- Browse to the APK you wish to upload.
- Enter the Name, Description and Version of the APK.
- Press Start Upload.

To delete an uploaded APK press the delete button and confirm the deletion.

VIEW THE APK LIST

To view the list of uploaded APKs, enter the following URL for your server in a browser or create a link to it on a web page or email template for users to access.

Example URL: https://{server_url}/api/apk

DOWNLOADING APKs

To download a specific APK, enter the URL using the APK ID. To access the download URL for an APK, go to Settings-APK Management and right-click on the download button and select copy link address. Enter the URL for the APK in a browser or create a link to it on a web page or email template for users to access.

Example URL: **`https://{server_url}/api/apk/{id}`**

CONTACT SUPPORT

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