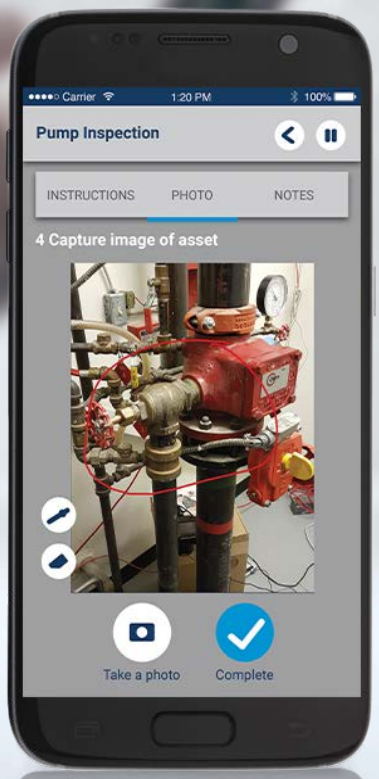
ON SIGHT
SOFTWARE

ON SIGHT
FLOW

EDITOR GUIDE



Librestream
Onsight Flow
Editor Guide
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Information in this document is subject to change without notice.

Name of Librestream Software Onsight Flow

Patents Notice: United States Patent # 7,221,386, together with additional patents pending in Canada, the United States and other countries, all of which are in the name of Librestream Technologies Inc.

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ONSIGHT FLOW EDITOR GUIDE

OVERVIEW

The Flow Editor allows 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 Editor by dragging, dropping and connecting steps.

Once a Workflow is built - it is then published to the Onsight Flow Admin Dashboard. The list of workflows and jobs is displayed on the dashboard.

The Onsight Flow app connects to Onsight Flow Manager allowing workflows to be downloaded, allowing 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 5.0 or higher
- iOS 10 or higher

Flow Editor
- Windows 7.0 or higher
- .NET 4.5 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 securiy 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/.

INSTALL

To install the editor, run the setup executable available from (https://goo.gl/NBUwnc). Once installed, go to the start menu under Onsight - Onsight Flow editor. Or launch Flow editor from the desktop shortcut.

CREATING WORKFLOWS

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

CREATING A NEW WORKFLOW

- Open the Flow Editor 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
- Press **Create**.

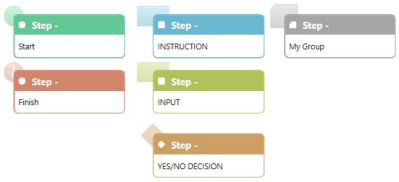
EDITING AN EXISTING WORKFLOW

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 Editor 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 Editor canvas, and connecting them to specify the sequence of the steps.



A workflow will always have a Start Step, and a Finish (Terminator) Step to specify the start and end of the workflow added automatically. Workflows may have mutliple Terminator Steps.

Start by adding steps in between and connecting them to each other using the connector arrows. Place your cursor over the Step to view its connector nodes. Click and Drag a connector node to extend its arrow and drop it on the Step to which you wish to link it.

Left click on steps and drag to position them on the workflow canvas.

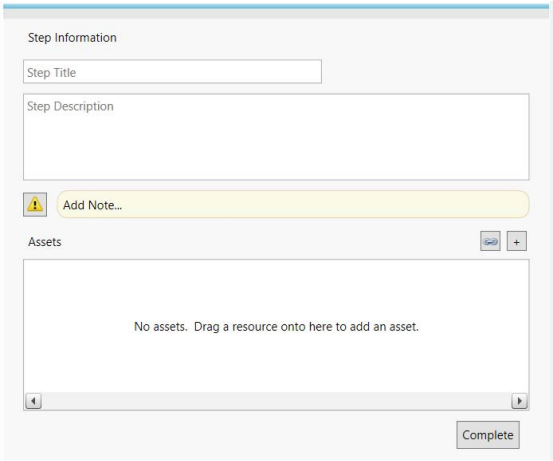
Select a connector node and press delete to remove the connection between two nodes.

To edit the Step Information and Properties, double click the step on the canvas to open its tab and edit its properties. Press the **Complete** button to return to the canvas.

INSTRUCTION STEPS

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

Instruction steps allow you to add a Step Title, Step Description and Assets. Step assets can be any file type which will be supported by the device on which the workflows will be executed on.



The title, description and any attached assets will be displayed to the Onsight Flow App user once they start the workflow and enter the step.

ADD A LINK

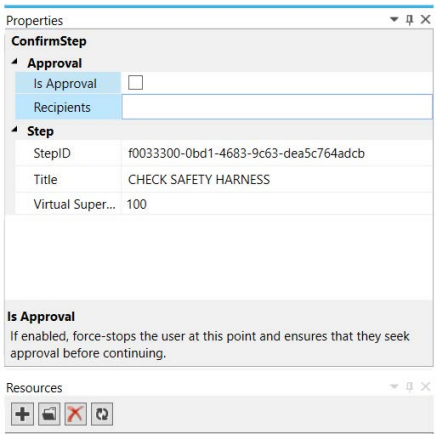
As well as adding assets, you can add links to external online resources. To do so, click the link button above the Assets window and enter the details of your link.

WARNING NOTE

An instruction step, just like any other step, allows you to add a Warning Note which will be displayed to the user upon entering the step.

STEP PROPERTIES

The properties define additional workflow behaviours such as approvals, virtual supervisor and resources.



REQUIRES APPROVAL

This property allows you to turn 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 allow 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, which will send a notification to the Onsight Flow App user. This either allows them to continue if the request has been approved, or allows them to alter their work based on the feedback and re-send the approval request.

VIRTUAL SUPERVISOR

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

All step types can be a "Virtual Supervisor" step. The Virtual Supervisor percentage can be changed in the Step Properties window - simply enter the chance (%) that this step should appear in the workflow.

If the value is set to a value below 100%, then the step will appear based on the percentage provided, e.g., entering 50% will show the step half of the time the workflow is run.

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 Editor, and simply drag the resources to attach them to the required step.

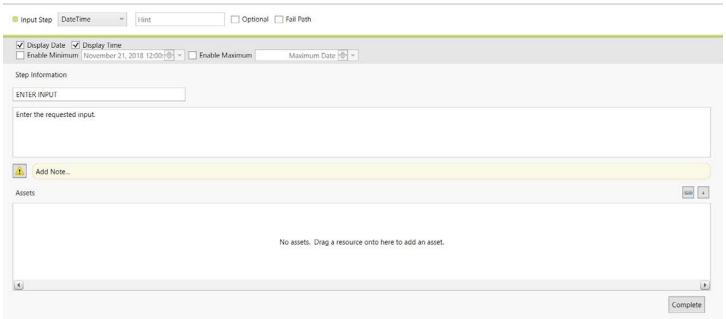
INPUT STEPS

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 customised 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 provided drop down list.



OPTIONAL

Each input step can also be made optional by selecting the **Optional** or **IsOptional** checboxes 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

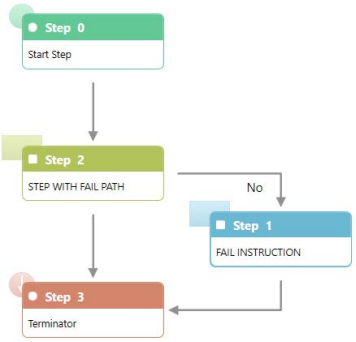
Each input step can have the option of a **Fail Path** enabled. This means if the input validation fails (i.e. the user does not take a photo, or enters a number outside of the specified range) the user will be taken down the fail path.

To set the fail path, select the "Fail Path" option in the step.

In the main workflow Canvas window:

- Add an extra connection for the Fail Path out of the specified step.
- Make sure the connection type for the arrow is set to "No" by clicking on the connector arrow and selecting the connection type from the dropdown menu.

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



ANNOTATION INPUT

Requires a user to annotate the image provided on the step.

The annotation step requires you to upload an image in the step assets section, and select the image from the "Annotation Asset" drop down list.

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.

BARCODE INPUT

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

To do so, 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: RFID tag scanning is also supported, and QR codes can also be scanned using the camera or barcode scanners.

The **Linked Step Id** field allows you to link the barcode input with a numeric step, which will allow 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, they must be in **Form View** (see Form View below).

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
- Turning the date and time selectors 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.

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 of "Quantity Buttons", which will give the user a "+" and "-" 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.

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

SIGNATURE INPUT

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

SELECTION INPUT

Selection inputs require a user to select items from a defined list. Selection steps can be defined as single or multiple selection. For mutiple selections, you must specify the minimum and maximum number of selections a user is required to make to complete the step.

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.

Dynamic Selections

The dynamic selection setting allows you to point to a database URL from which to retrieve the list. This allows your workflow to access up to date values as they are updated in the database.

To configure Dynamic Selections:

- Select **Selection** from the Input Step drop-down list.
- 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.

See the Dynamic Selections or details on setting up the database.

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.

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, but in addition allows 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 clicking on the connector arrow and selecting it from the dropdown menu.

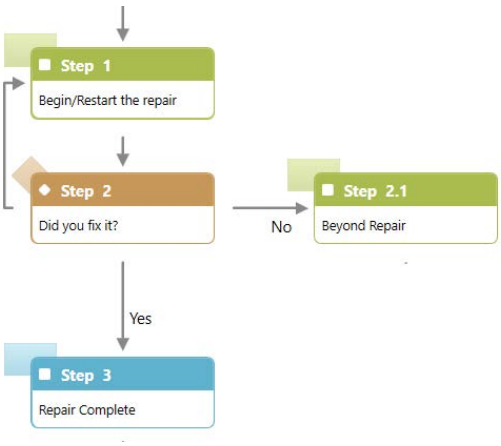
- "Yes" option connector should be set to "Yes"
- "No" option connector should be set to "No"
- "HasOther" option connector should be set to "None"

Each of the decision option titles can be customised, and will default to "Yes", "No" and "HasOther" if not specified.

STEP PROPERITES

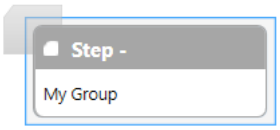
To enable the third connector option, select the HasOther checkbox in the step properties.

Enter the title for each of the options you have enabled: Yes, No, and Other. These will appear as selection options for the user when the step is displayed.

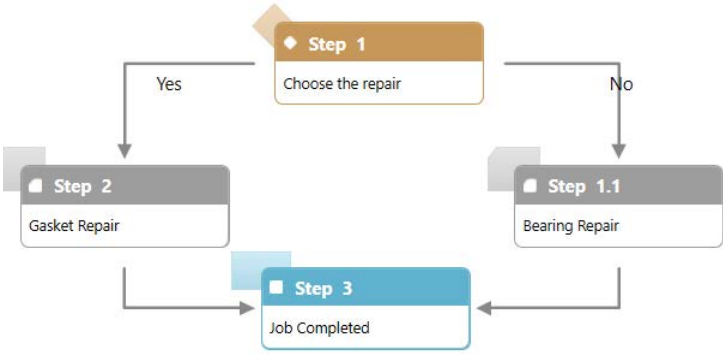


GROUP STEPS

Group steps are an important component of building complex workflows. A Group step allows 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 Steps' Canvas in your main workflow.



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



FORM VIEW

Form View is an option in the Group properties which will 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 worklfow can still be published when a step contains a warning.

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 to your Team. You can chose 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 Editor. Use your Team Name and credentials to login.

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

You can choose to update an existing workflow from the dropdown 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 allow 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 a URL defined within `DynamicUrl` 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 (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 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"
        }
        }
}
```

CONTACT SUPPORT

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