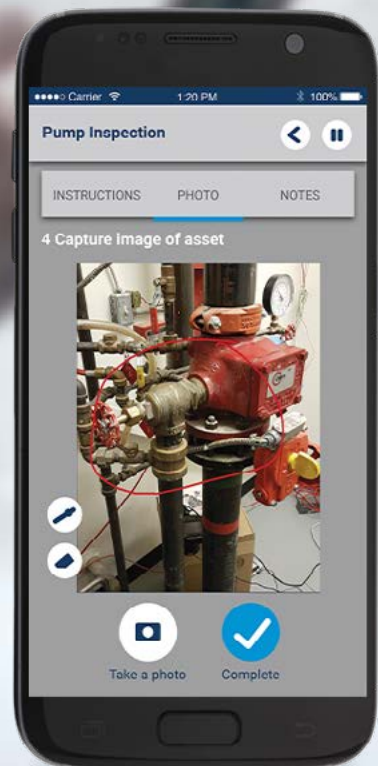


ON SIGHT
FLOW
USER GUIDE



**Librestream
Guide
Onsight Flow
Doc #: 400342-00, rev.A**

September 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 wearables, smartphones, or tablets. You can follow step-by-step instructions or digital forms that include access to relevant content, simplified data capture, and digital sign off procedures.

Onsight Flow uses Workflows to complete Jobs.

- A **Workflow** is a set of instructions on how to complete a job. A Workflow can be used multiple times to perform a job. Workflows are created and managed by your Team administrator.
- A **Job** is the execution of a Workflow. The user performs the job to collect data and complete tasks. A Job can be assigned to you by a team leader. You can also start a Job from a Workflow or by scanning a QR code.

INSTALL

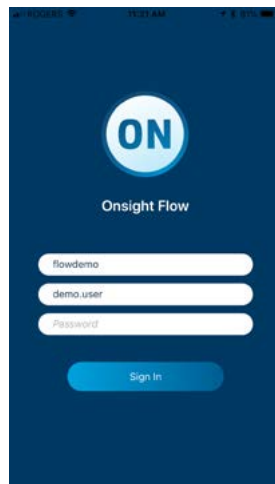
Onsight Flow is available for download from the App Store and Google Play.

SIGN IN

You will receive a welcome email with your Team Name, User Name and Password. Enter these credentials and select **Sign In**.

If you do not know your credentials or have not received the Welcome email, contact your internal Onsight system administrator.

You will auto-login whenever you restart the app.



DASHBOARD

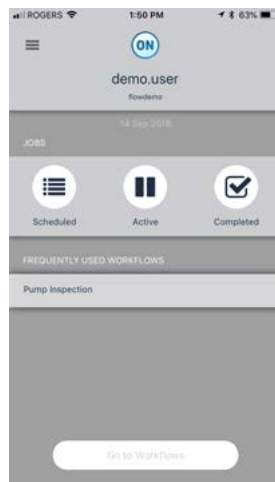
The Dashboard displays your Username and Team Name.

The following Job links are displayed:

1. Scheduled Jobs.
2. Active Jobs.
3. Completed Jobs.

A list of **Frequently Used Workflows** is displayed for quick access.

Press the **Go to Workflows** button to see your downloaded Workflows or to download more.



WORKFLOWS

The Workflows page has two tabs: Downloaded and All.

Downloaded Workflows are displayed on the **Downloaded** tab. The **All** tab displays a list of available Workflows you can download from your Team Server.

On the **All** page, select the name of a Workflow. Press the **Download** button to begin the download.

JOBS

Jobs can be started in the following ways:

1. On the **Dashboard**, press **Go to Workflows**.
 - a. Press **All** and select a Workflow.
 - b. Press **Download**, and press **Start**.
2. To start a Scheduled Job, select a Job and press **Start**.
3. Scan a **QR code** to start a Job. QR codes may be available on an asset, website or manual.

Once you have started the Job:

1. Enter the name for the Job, e.g., Inspection Site #32, then press **Start**.
2. Follow the onscreen instructions for each step, entering and capturing data as needed.
3. Once you have completed the tasks for each step, press the **Complete** button.

Tip: A job can be **PAUSED** at any point during the workflow and Resumed, Aborted or Assigned to another team member if necessary.

Launch Onsight Connect

At anytime during a job you can press the **Connect** button to launch Onsight Connect and call a remote expert.



Scheduled Jobs

Scheduled Jobs are assigned to you by your team leader. On the dashboard, press the **Scheduled** button.

Tip: You will receive an email notifying you of the Scheduled Job.

1. On the dashboard tap **Scheduled**.
2. Press on the Job name.
3. Press **Start**.
4. You may be prompted to download the Job. If so, press **Download**.
5. Press **Start** to begin.

Tip: You will receive a notification on your smartphone when the Scheduled Job is due to start.

Active Jobs

You can view and resume Active Jobs that were paused by pressing the **Active** button.

1. Press the **Active** button.
2. Select a Job name.
3. View the Job details.
4. Press either **Review, Abort, Assign** or **Resume**.
 - a. Review: check the details on the completed steps.
 - b. Abort: delete the job and all its data.
 - c. Assign: assign the job to another team member.
 - d. Resume: restart the job to complete the steps.

Completed Jobs

On the dashboard, press **Completed** to view your list of finished jobs.

1. Select a completed job.
2. Press the **Summary** button to review all completed steps and access the data.
3. Press **Report** to see the generated report from the completed job .
4. View the Job details.
5. Press either **Review, Abort, Assign** or **Resume**.
 - a. Review: check the details on the completed steps.
 - b. Abort: delete the job and all its data.
 - c. Assign: assign the Job to another team member.
 - d. Resume: restart the job to complete the steps.

TYPES OF STEPS

The following types of steps may be included in a job:

1. Instructions
2. Approvals
3. Inputs
4. Decisions
5. Forms

Instructions

Instruction steps do not require the User to enter any input. The step simply displays information and can include attachments and warning notes.

Approvals

Approval steps require the User to request an approval before they can continue with the Job. The User cannot proceed until approval is granted or declined. If approved, the user continues on. If declined, the User has the opportunity to take corrective action and submit for approval again.

Inputs

Input steps require the user to enter a value which will be saved and sent to the server. On screen instructions direct the User as to which type of input is required.

The inputs could include:

- a. Text
- b. Numeric
- c. Barcode
- d. Photo
- e. Video
- f. Audio
- g. Date/Time
- h. Signature
- i. Selection
- j. Annotation
- k. File

Decisions

A decision step requires a user to make a decision which will determine which step they will go to next.

Forms

A form displays all of the steps in a list view and the User has to complete all of the steps to continue. The User can choose the order to complete the steps in. A **looped form** allows the user to complete a form, submit it, and complete it again if needed.

SETTINGS

Delete Local Workflows

You can delete all downloaded workflows to free space on your device.

Refresh Organisation Details

Press to update your Organisation details from the Team server.

Acknowledgements

View acknowledgements to see a list of all external components used and links to the license agreements.

SIGN OUT

Go to **Settings** to Sign Out of the application. Note: this will delete any locally downloaded workflows and any unsynchronised data for security purposes.

CONTACT SUPPORT

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