WorkfloPlus

V2.7 User Guide

OVERVIEW

WorkfloPlus converts existing paper-based and human processes into easy to follow, step-by-step digital work instructions accessible via desktop, mobile and wearable computing devices.
A Workflow is your process digitised 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.
Workflows are built in the **WFP Editor** by dragging and dropping steps and using connecting lines to define the order of the sequence. Once a Workflow is created it is published to the **WFP Dashboard** where it is accessible as a template for completing jobs.
The **WFP 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.
WFP Apps connect 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 the WFP Dashboard and displayed for review.

WORKFLOPLUS SPECIFICATIONS

WFP Apps

- Android 5.0 or higher
- iOS 12 or higher
- HMT-1 / NAV-500 TBD

WFP Editor

- Windows 7.0 or higher
- .NET 4.6.1 or higher
- 500MB Disk space

WFP Dashboard

- 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
- Wired - 10/100 Ethernet port

WORKFLOPLUS COMPONENTS

WORKFLOPLUS EDITOR

The **WFP Editor** enables you to create, edit, save and upload workflows to the **WFP Dashboard** using a simple drag and drop user interface.

WORKFLOPLUS DASHBOARD

The **WFP Dashboard** is the central hub from where Workflows, Jobs, Users and Team Settings are all managed. It also enables users to create and customise reports, write queries and view audit logs. It also provides access to your account settings.
Workflows are uploaded from the **WFP Editor** into the **WFP Dashboard**. When users run jobs on their **WFP Apps** the job data is sent back to the **WFP Dashboard**. From there job data can be accessed, downloaded and sent to other systems if required.

WORKFLOPLUS APPS

WFP Apps enable you to download and complete workflows as jobs. Jobs are uploaded to the **WFP Dashboard** automatically and the data is available straight away.

INSTALLING THE EDITOR

To install the **WFP Editor**, you will need to download the executable file and ensure you meet the minimum system requirements detailed below. You can then run this file to begin the install.

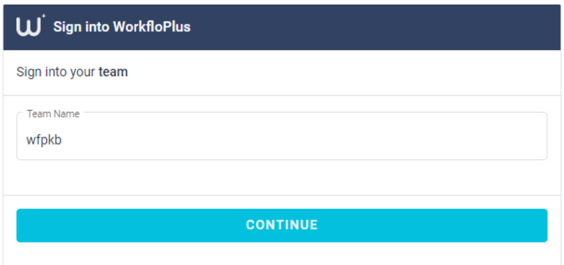
PLEASE NOTE: the **WFP Editor** is a Windows only application. If you are using a MAC you will need to install some additional software to allow a Windows operating system to work.

Please refer to the WFP Editor User Guide for more detailed information on how to build and upload a workflow.

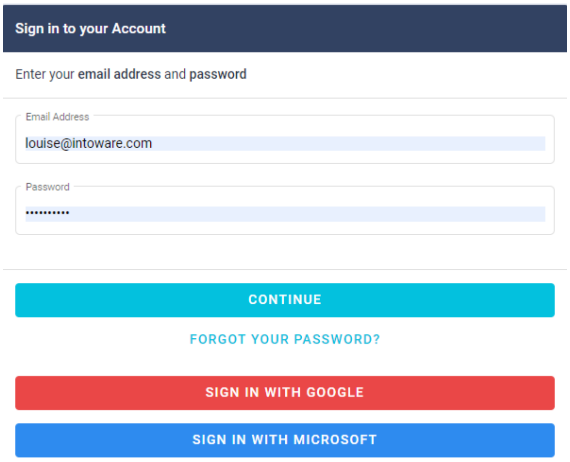
LOGGING IN

LOGGING IN WITH PASSWORD

To access the **WFP Dashboard** from your browser go to https://dashboard.workfloplus.com and enter your Team Name

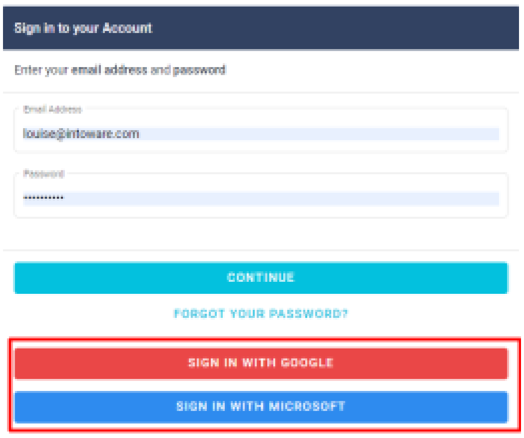


Once you have entered your Team Name enter your login credentials which will have been set by your Administrator.



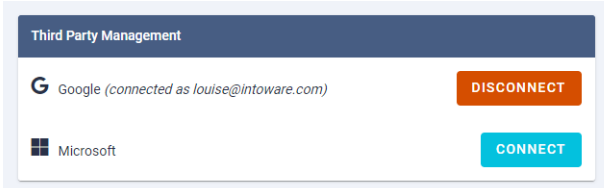
LOGGING IN WITH 3RD PARTY

If you have a Google or Microsoft account and your Administrator has set this as an option you can sign in by clicking on the Google or Microsoft links at the bottom of the login screen.



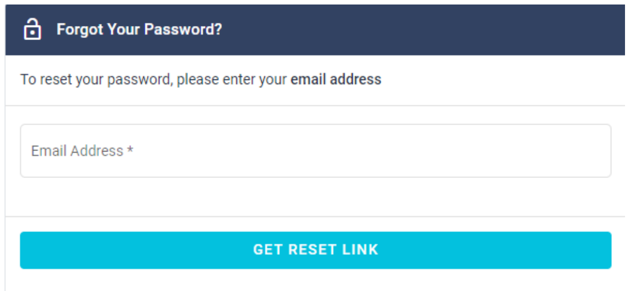
To set up 3rd Party Log in navigate to your Account Settings by clicking on the burger menu on the top right hand side of your screen after logging in and click on the Settings cog, or you can go direct via https://accounts.workfloplus.com/

Click on either Google or Microsoft to connect to your account.



FORGOT YOUR PASSWORD

If you cannot remember your password you can reset your password from the login page. Select 'forgot your password' and enter your email address. If your email address is registered you will receive an email containing a reset link.



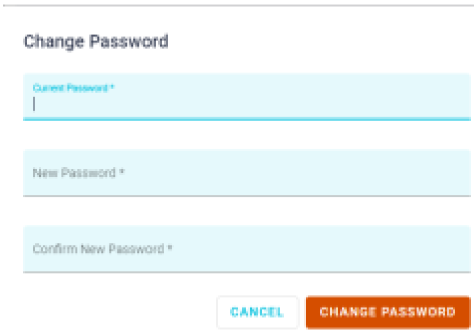
Occasionally you may find that your organisation's IT rules block the password reset email from arriving in your inbox, in this event the fallback option is to ask a user within your team that has a higher permission level than your own user account to generate a new password for you. They can do this by navigating to your user account from the User panel in the dashboard, from there click Reset Password and follow the instructions; if Reset Password is greyed out it means they don't have a high enough permission to reset the password of that particular user.

PLEASE NOTE: If you were originally set up with 3rd party sign in enabled on your account you will not receive a password reset email if you select 'forgotten password'. This is expected as the password is generated by your 3rd party account and not WorkfloPlus. If you have problems signing in via 3rd party you will need to reset your credentials on Microsoft or Google.

CHANGING YOUR PASSWORD

If you want to change your password navigate to your Account Settings by clicking on the burger menu on the top right hand side of your screen after logging in and click on the Settings cog, or you can go direct via https://accounts.workfloplus.com/

You will be asked to enter your current password and then a new password.



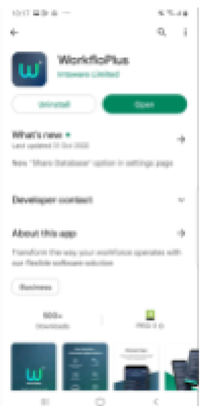
PLEASE NOTE: Passwords must contain an uppercase, lowercase, number and a symbol.

LOGGING IN WITH MOBILE APPS

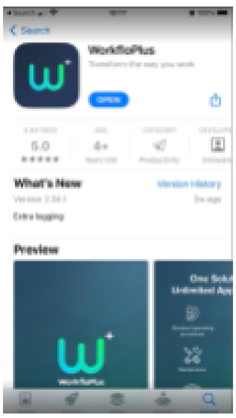
To download the WorkfloPlus to your chosen mobile or wearable device you will need to do this directly from the app store.

Android: WorkfloPlus is compatible with Android Version 5 and above. Download from the Google Play Store.

iOS: WorkfloPlus is compatible with the current and previous versions of iOS (12, 13 & 14). Download from the iOS App Store.



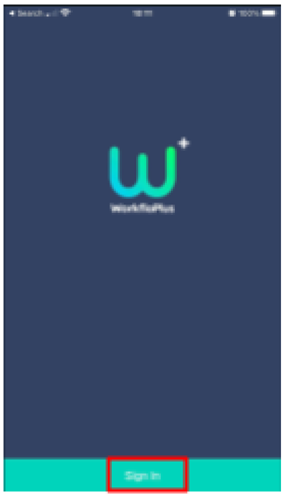
Android



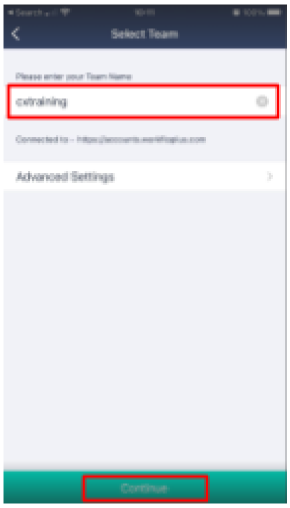
iOS

Once you have downloaded the WFP App you can sign into WFP with either your login credentials or via 3rd party sign in.

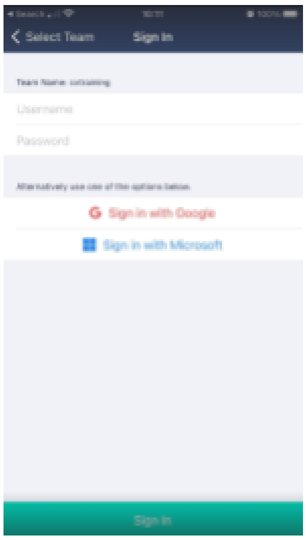
Firstly select **SIGN IN**:



Then enter your Team Name and then hit **CONTINUE**:



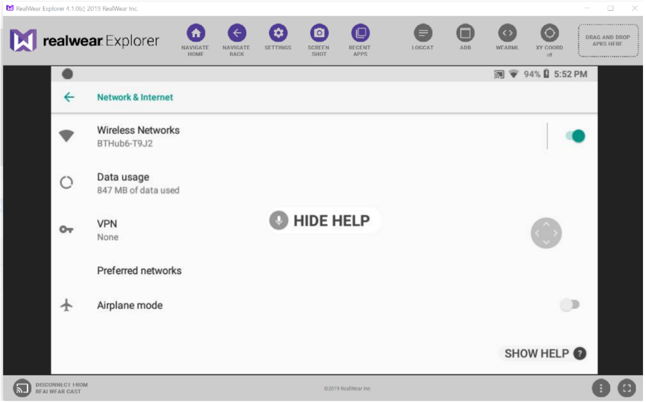
Finally either enter your Username and Password or, if activated, click on the relevant 3rd Party (Google or Microsoft) link.



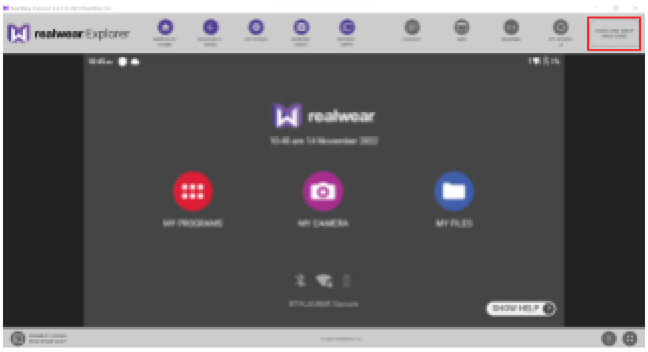
LOGGING IN WITH HMT

You can install the Workfloplus onto your HMT-1 device in 2 ways:

1. Download via the Realwear Explorer App for your laptop or PC, then add the WFP APK file. The APK file can be requested by emailing support@intoware.com. Connect your HMT to your laptop via the USB cable and open the Realwear Explorer on your laptop or PC. Ensure that you are connected to your local wifi on the HMT. Say 'wireless networks' and check your settings.

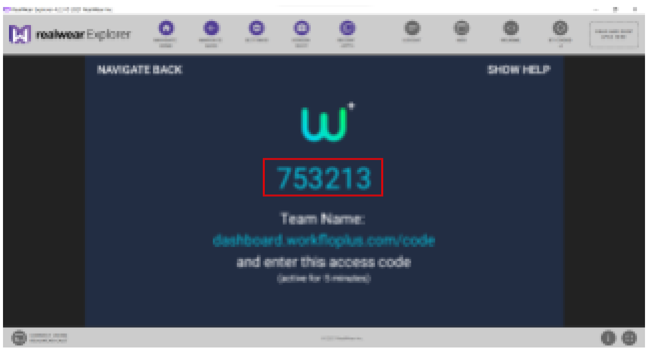


Drag and drop the APK file into the APK box (top right corner of the Realwear Explorer), this will run and display a message when installed.

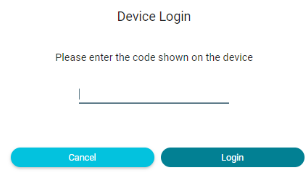


2. You can also download WorkfloPlus via Realwear Cloud.

When WFP has been installed, say **"MY PROGRAMS"** and then **"WORKFLOPLUS"**. When WFP launches say **"SIGN IN"** and a 6-digit code will be automatically generated.



Once you have the code you will need to enter this into your **WFP Dashboard** to connect the HMT. You do this by selecting the hamburger menu on the **WFP Dashboard** home page (top right, next to your team name), select device login, and enter the 6 digit code displayed on the HMT.

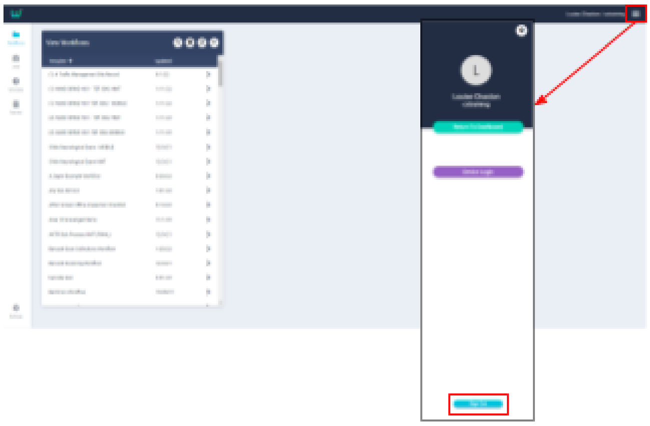


You can now unplug your HMT device from your PC and you are ready to go.

LOGGING OUT

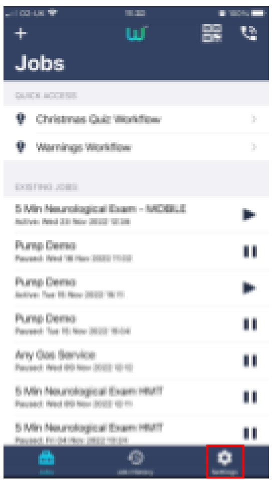
LOGGING OUT OF THE DASHBOARD

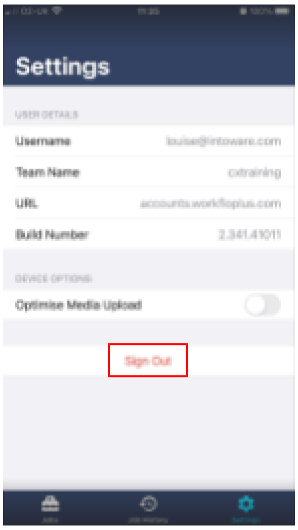
To sign out of the **WFP Dashboard**, select the burger menu (top right) and select **Sign Out**. You will be signed out and taken back to the Team Name page.



LOGGING OUT OF MOBILE APPS

Logging out is done via the settings screen in **WFP Apps**.





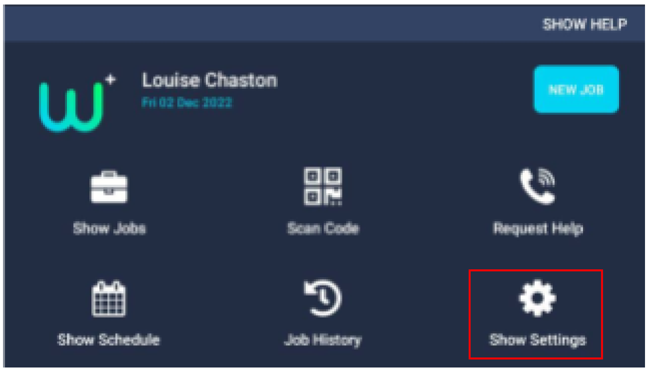
If there are pending sync items you are warned about it and given an option to cancel or proceed with sign-out. If there are no items pending sync then you will be signed out of the app.

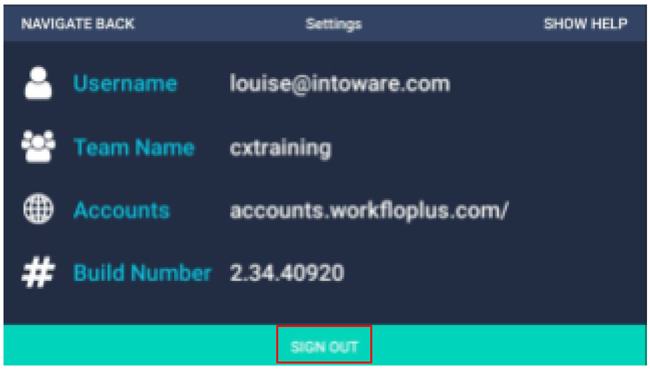
PLEASE NOTE: If a user signs out whilst a sync is still in progress this will result in the sync not completing and as a result PDF reports will not be available for any jobs in progress.

Please refer to the [Team Settings] section for more information on auto sign out.

LOGGING OUT OF HMT

To log out of the HMT from the main page say **"SHOW SETTINGS"** and then **"SIGN OUT"**.

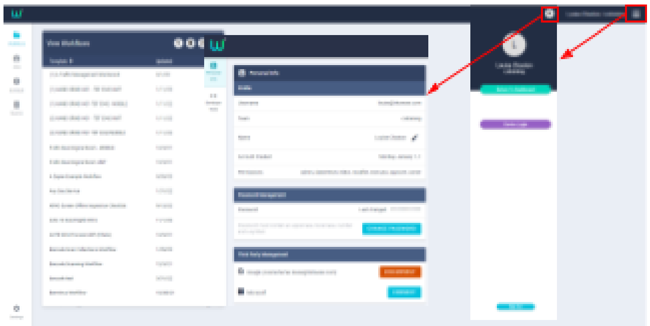




ACCOUNT SETTINGS

DASHBOARD

Navigate to your Account Settings via the burger menu (top right) of your screen after logging in and click on the Settings cog, or you can go direct via https://accounts.workfloplus.com/



At the top of the screen you will see a summary of your Account Settings, including a list of all permissions that have been assigned to you. You can edit your name by clicking on the pencil.

User Permissions

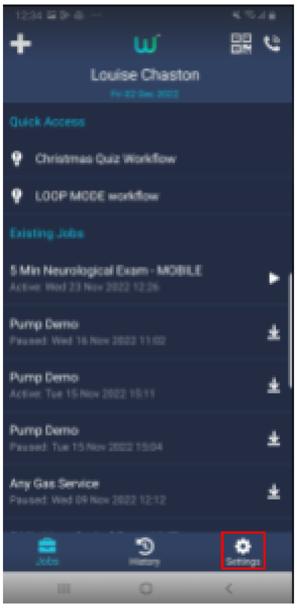
Any combination of User Permissions can be chosen for each registered user depending on requirements.

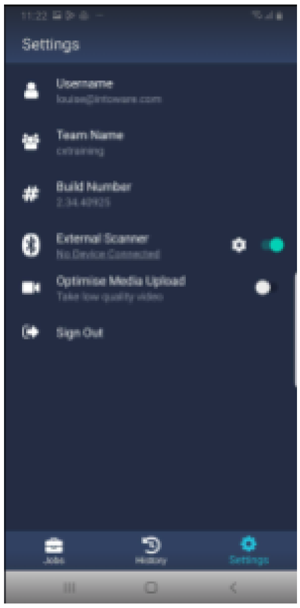
Owner	• Full permission set • Owner adds new users and sets their permission status to Admin or User • Can remove Admins and Users • Can change Admin User permissions • Download all PDFs
Administrator	• Full permission set, eg add new Users, change their permissions, delete users. • An Admin cannot delete or create new Admins. • An Admin cannot change the permissions of other Admins. • An Admin can lock other user's accounts but not lock an another admin • Reset a Users or another Admins Password • Download all PDFs
Data Viewer	• User can see all Workflows and Jobs run in their Team, or jobs allocated to them • Cannot download PDFs.
Editor	• User can manage workflows, for example change workflow descriptions, title/naming convention, allocating workflows to Users or Groups, archiving workflows • Upload and publish workflows or set for approval. • Download PDFs from their jobs only.
Modifier	• User can edit data on the server, for example archiving jobs • Cannot download PDFs.
Approver	• User can review and approve or reject new workflows or changes to workflows. • An Approver would be the only person to see such a workflow on their mobile app in order to run the workflow. • They could also download the job as a ZIP file and open in their Editor • Once Approved, it would be classified as 'published' and Team Members would then have access to this workflow • Cannot download PDFs.
Execute Jobs	• This enables users to run jobs on their device • Cannot download PDFs.

MOBILE APPS

Settings can be accessed by clicking on the Setting cog on the bottom right hand side of the home screen. The Settings screen displays the following information:

- Username
- Team Name
- Build Number
- External Scanner - Android Only
- Optimise Media Upload - allows low quality video
- Sign Out





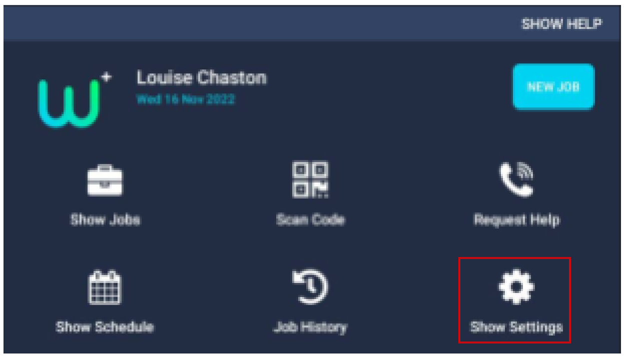
PLEASE NOTE: Clicking on the Build Number 5x will bring up links to Device and Database Logs which can then be shared with the Intoware Support Team if needed.

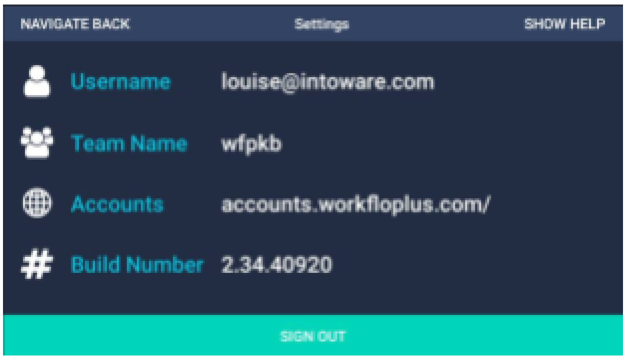
HMT

On the HMT settings can be accessed by saying **"SHOW SETTINGS"** while on the main WFP screen.

This will bring up a panel showing the following information:

- Username
- Team Name
- Accounts
- Build Number
- Sign Out





DASHBOARD OVERVIEW

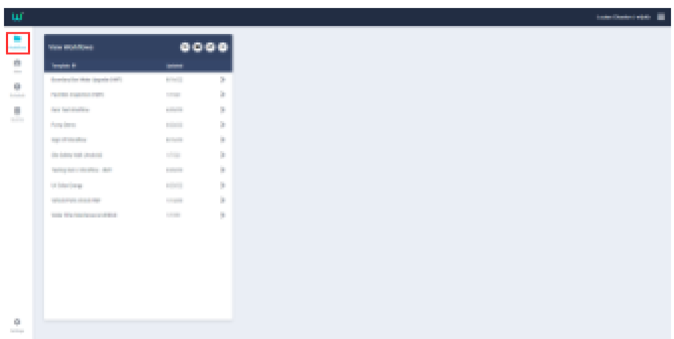
The WFP Dashboard is made up of the following sections:

- Workflows
- Jobs
- Schedule
- Queries
- Team Settings
- Account/Device Log in

Depending on your Permissions some of these options may not be available to you.

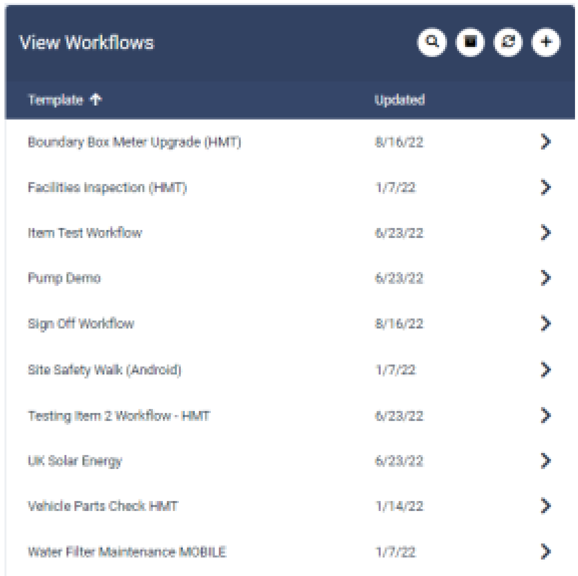
WORKFLOW PANEL

View workflows by selecting workflows in the navigation panel. Once selected this will open up the view workflows tab where you will see a list of all workflows.



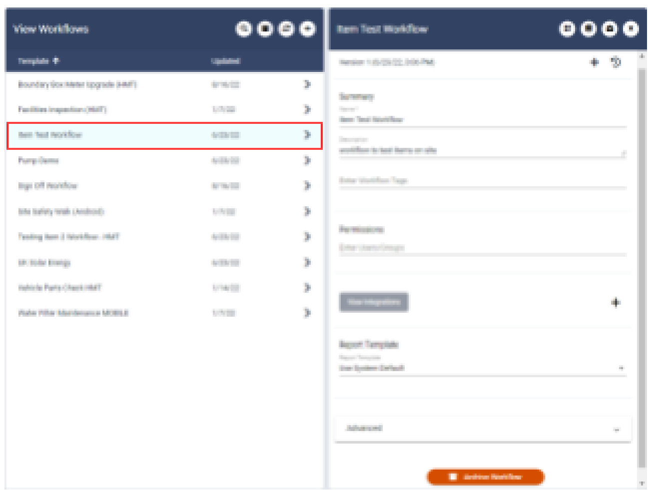
From this panel, you will be able to view the workflow name, and the last updated date, this will show as the date or time depending on whether it was last updated on the same day or historically.

You can also filter, search, refresh, and add workflows from this panel using the buttons in the view workflows header.



VIEWING WORKFLOWS

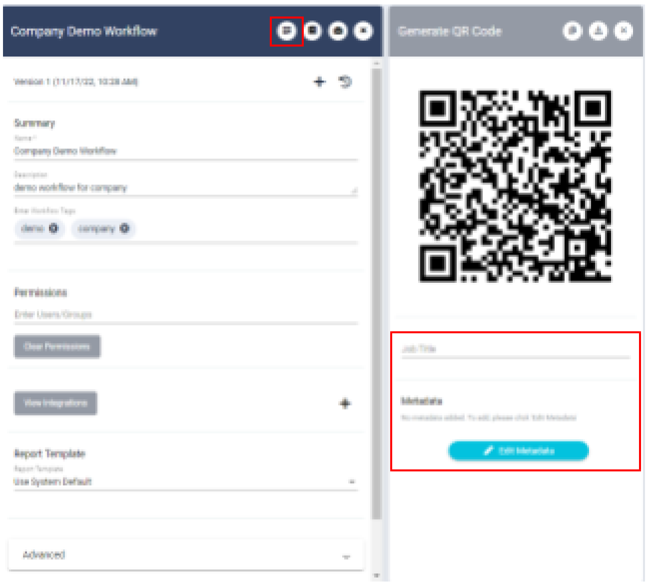
To open the workflow details panel, click on the Workflow you would like to view. This will open up the panel to the right of the list. From here you can view a summary of the workflow selected, permissions, triggers, advanced information such as the Workflow ID and if you have the required permissions you can archive a workflow.



Generating a QR Code for a Workflow

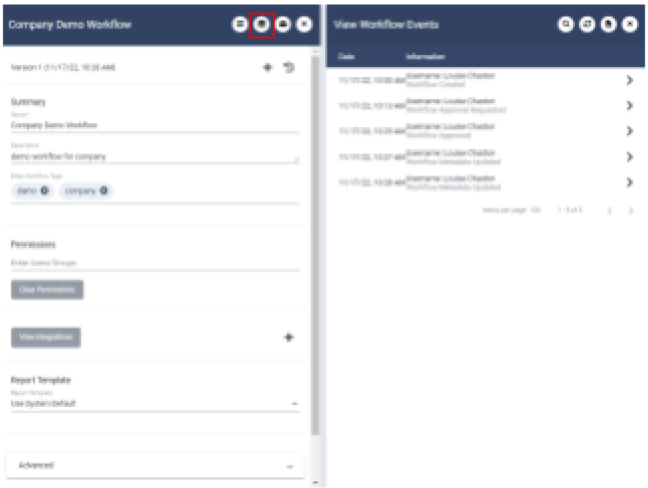
At the top of the Workflow Panel you will see a QR button. Clicking on this will automatically generate a unique QR code which can be printed or shared as required. You can add a Job Title and Metadata at the bottom of the panel if you wish.

WFP Apps can scan this unique QR code to start a job.



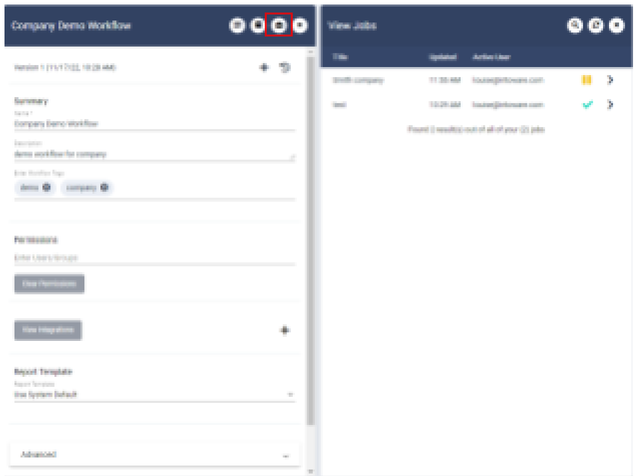
View Workflow Events

Also at the top of the Workflow Panel is a link to view Workflow Events. This will show you all activity that has taken place in relation to the Workflow, for example, when it was created, updated, approved etc.



View Jobs

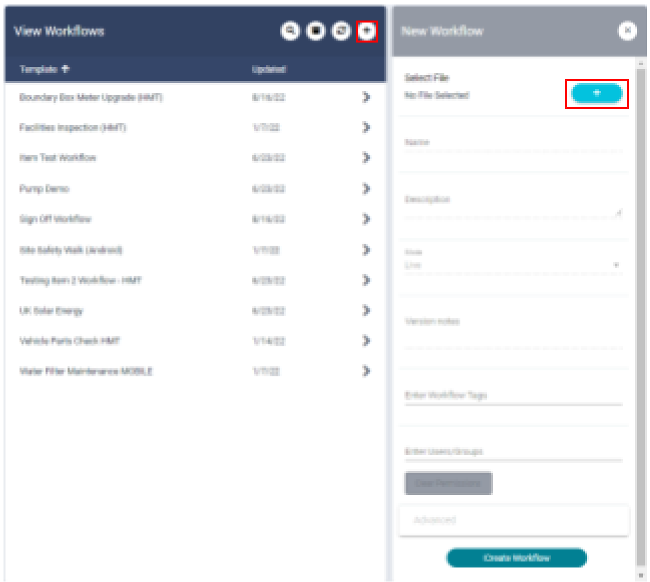
To view Jobs completed on a specific Workflow click on View Jobs.



The Job Panel will be looked at in more detail in the following section JOBS PANEL.

UPLOADING A NEW WORKFLOW

To upload a new workflow file press the plus icon in the "New Workflow" panel and select the workflow ZIP file from your computer.



After selecting the file, the Name and Description are populated from the Workflow automatically, but can be amended if needed.

By default the Workflow will be made LIVE however you can follow a review process by selecting either DRAFT or FOR APPROVAL if necessary.

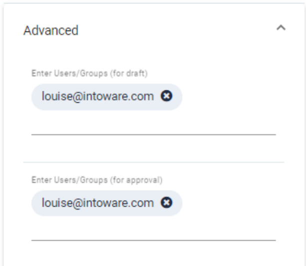
Workflow Permissions can be set and amended and Version Notes can be also added. Workflow Tags can also be entered here to allow for each searching in the Workflow panel and for integrations.

Hit CREATE WORKFLOW to save the new workflow to your team.

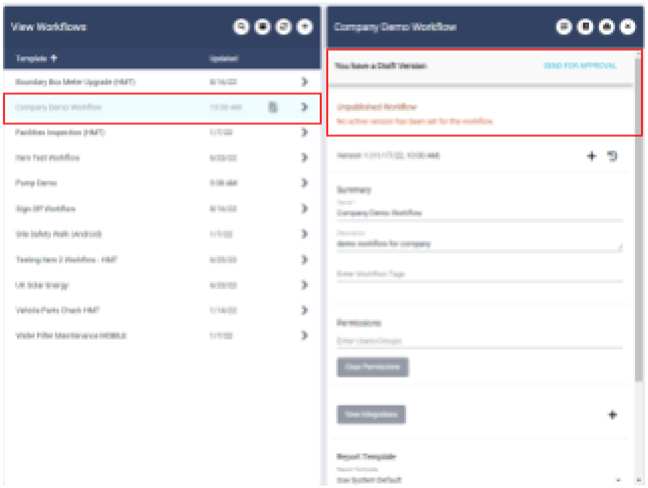
Live/Draft/For Approval

A new workflow can be uploaded from your drive and set to either Live (default), Draft, or For Approval.

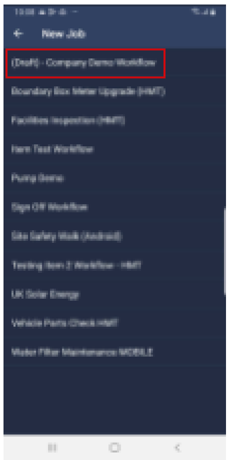
Clicking on the Advanced tab at the bottom of the Workflow panel allows you to give access to the DRAFT or APPROVAL versions to specific individuals or groups if needed. If left blank any users with appropriate permissions will be able to access.



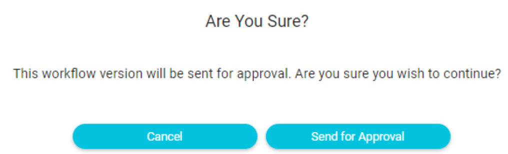
If a Workflow is set to DRAFT mode it will be greyed out and highlighted with a draft icon in the Workflow Panel.



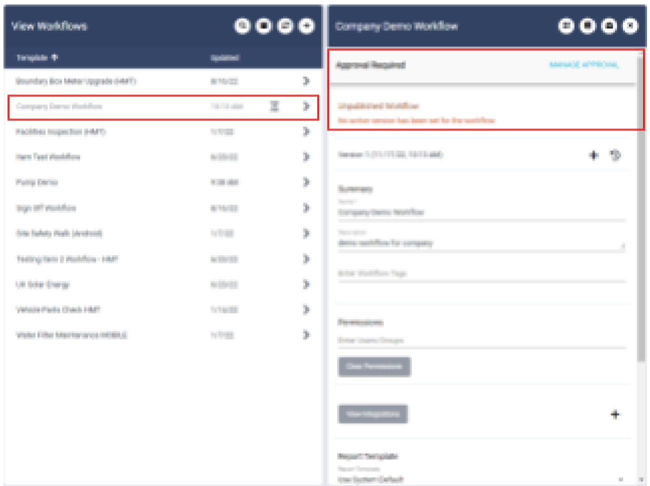
User(s) assigned to this workflow and with the appropriate permissions will be able access and run this job to check they are happy.



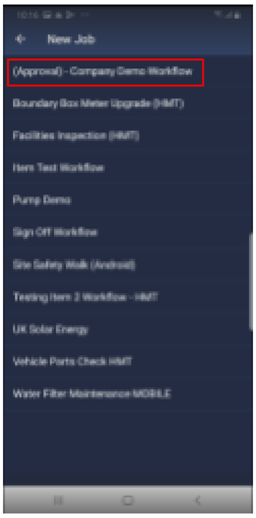
Once the user is happy, they can send the DRAFT version for approval by clicking on SEND FOR APPROVAL.



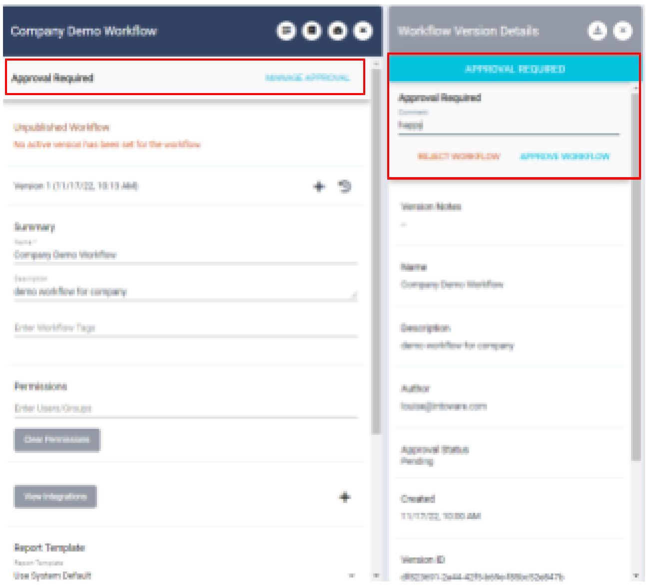
If a Workflow is set FOR APPROVAL it will be greyed out and highlighted with an hourglass icon in the Workflow Panel.



Users with appropriate permissions can still access and run this workflow at this point.



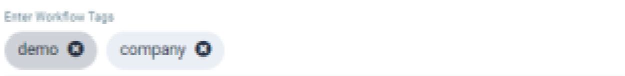
Click on MANAGE APPROVAL and enter comments to either reject or approve the workflow.



WORKFLOW TAGS

Workflow Tags can be added in the Workflow Panel by typing a word and then hitting enter. A Workflow Tag can be used to allow for easy searching within the Workflows and Jobs panel.

Integrations can also be set up to fire based on specific Workflow Tags.



SETTING WORKFLOW PERMISSIONS

WorkfloPlus allows you to control which users and groups can access individual workflows.

Permissions can be set for each individual workflow in the Workflow Details Panel. To set permissions, select the workflow for which you would like to set permissions to open the Workflow Details Panel. Under permissions, if there are no users or groups specified then the workflow will be available to all users.

To restrict access to specific users and groups enter the users and groups that require access (all unspecified users and groups will lose access).

INTEGRATIONS

If any integrations have been set up for the Workflow then they can be viewed by clicking on VIEW INTEGRATIONS. To add a new integration for your Workflow, click on the + and complete the information. See INTEGRATIONS for further information.

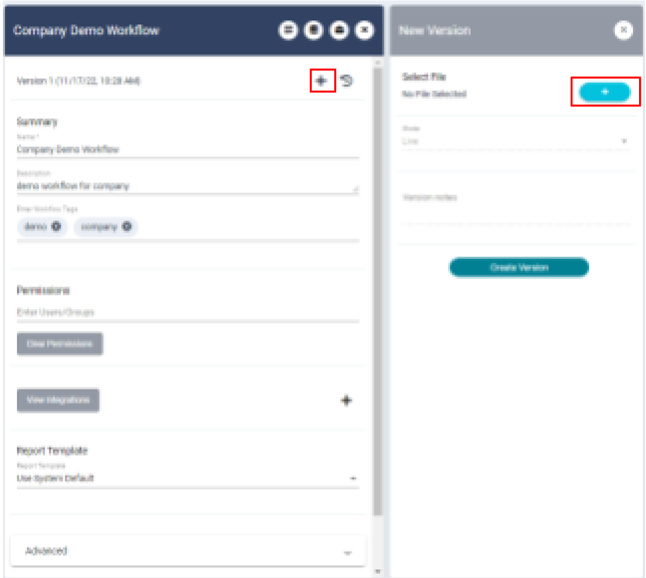
ASSIGNING A REPORT TEMPLATE TO A WORKFLOW

When a job is completed a PDF report is generated automatically. This can either be manually downloaded from the job panel or fired automatically as part of an Email Trigger.

By default a standard WorkfloPlus report template is used, however if a custom report has been created this can be assigned to the Workflow via the drop down menu.

ADDING A NEW WORKFLOW VERSION

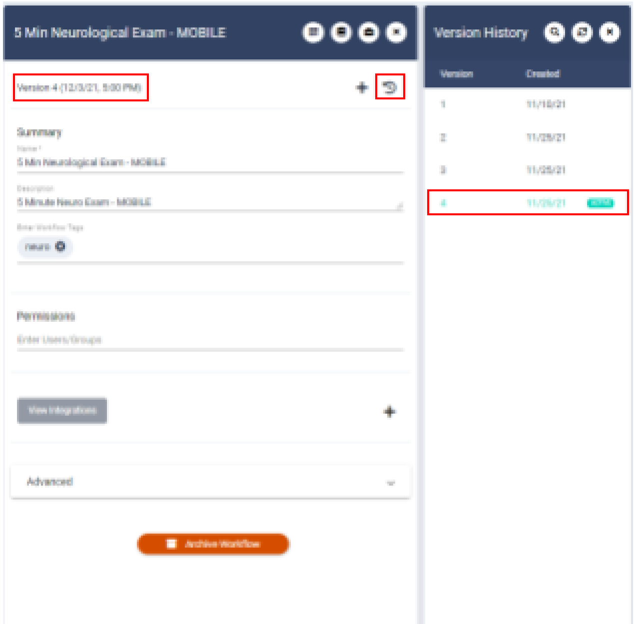
To add a new version of an existing Workflow click on the plus button on the relevant Workflow panel:



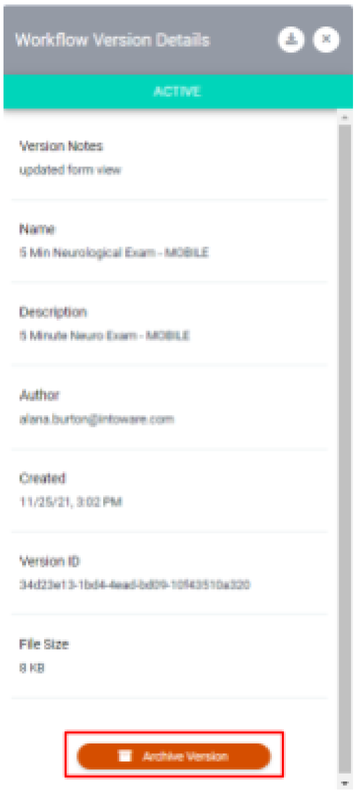
This will open a New Version panel and the new Workflow can be added. You can then follow the steps in the [UPLOADING A NEW WORKFLOW](#) section.

MANAGING WORKFLOW VERSIONS

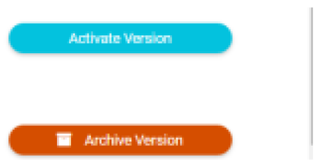
The current workflow version can be found in the Workflow details panel and will display the date and time it was last updated. To view previous versions click on the back arrow icon. The active Workflow will be highlighted in the Version History panel.



To view further information such as notes, name, description, and author version ID select the required version, this will open the version detail panel. You can also archive the version (permissions allowing) from within this panel.



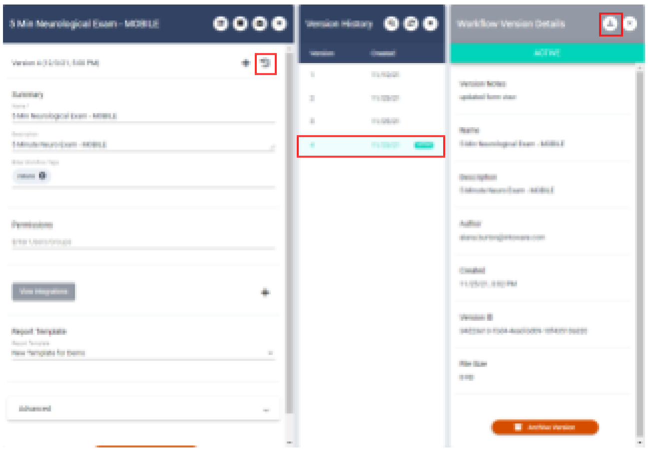
Clicking on a non active version of your workflow will bring up the option to Activate if your Team Settings allow and/or Archive that specific version.



Any changes made to your version of the Workflow will be updated immediately within the **WFP Apps** so you can be sure that users are working on the correct version.

DOWNLOADING A WORKFLOW

If you want to make any changes to a Workflow it can be downloaded in ZIP format from the **WFP Dashboard** and then uploaded to the **WFP Editor**. To download a Workflow access the Workflow Version Details panel via the curly arrow on the Workflow Details panel. Click on the Version that you wish to download and then select the download button at the top of the panel.



ARCHIVING A WORKFLOW

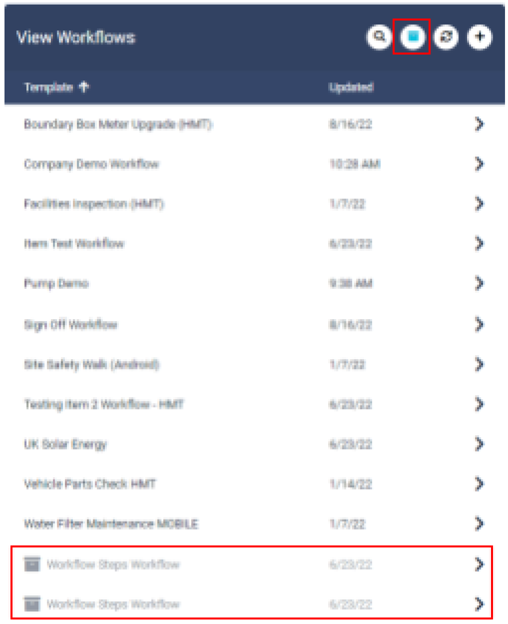
You may want to archive a workflow so that it can no longer be downloaded or edited - this effectively locks that workflow. To archive a workflow you will need to have the relevant permissions set by your administrator. Select the workflow that you wish to archive from the view workflow panel. This action will then open the workflow details panel.

If you hold the required permissions you will see the archive workflow button at the bottom of the panel. If you do not have the relevant permissions, this will not show. To archive the workflow, select the archive workflow button, once selected a pop-up will ask you to confirm or cancel.

Once archived, you can not unarchive a workflow. You can however restore a previous version if your permissions allow.

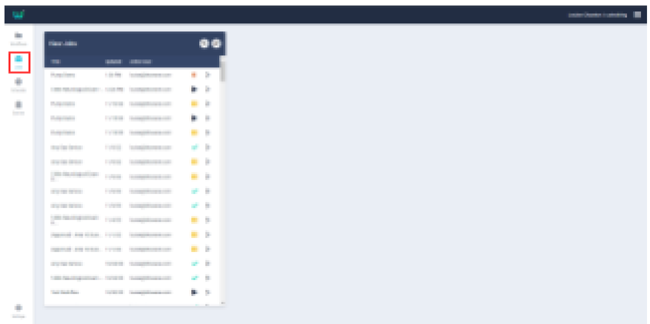
PLEASE NOTE: WorkfloPlus does not allow users to delete workflows completely because any associated job data would also be lost. Archiving 'locks' the workflow but enables old job data to still be available for analysis and download should it be required.

View archived Workflows can be toggled on and off by selecting and deselecting the 'bin' button at the top of the View Workflows panel as required.



JOBS PANEL

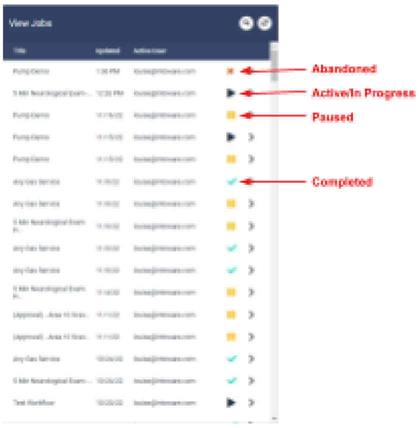
View jobs by selecting Jobs in the navigation panel on the left hand side of your Dashboard. Once selected this will open up the View Jobs panel in which all jobs will be displayed.



From this panel, you will be able to view the Job Title, the updated date, the user and job status. You can run searches based on Workflow Tags, User ID, Workflow Name, Job ID and Workflow ID.

PLEASE NOTE: If Allow Job Naming is enabled in Settings then the Job Name will be displayed. If this is not enabled, then the Workflow Title will be displayed.

Each Job will be marked with a status depending on whether it is LIVE, COMPLETED, ABANDONED or PAUSED.



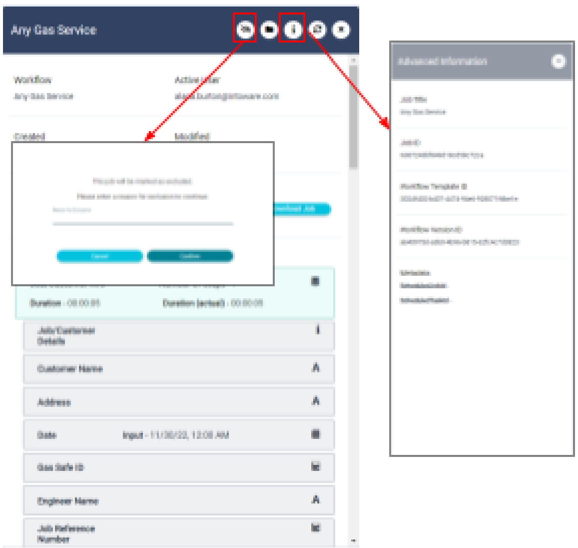
Clicking on any job from the list will bring up the Job Panel from where job data can be accessed.

The first button at the top allows you to Exclude the job from any searches if needed. You will be asked to enter a reason for the exclusion.

The next button (folder) links to the associated Workflow Panel.

The Information button takes you to the Advanced Information panel from where you can obtain information on the Workflow IDs and Job ID. It will also contain a list of any associated Metadata.

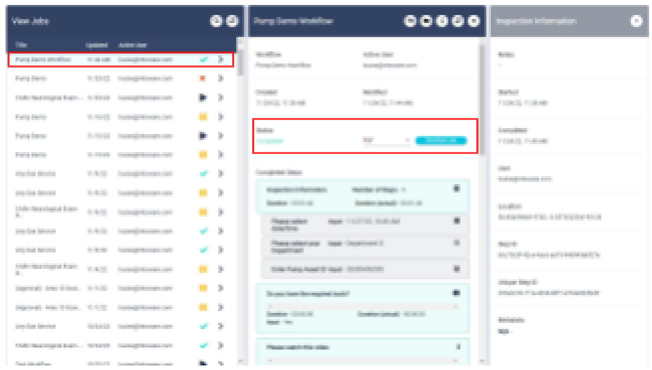
Finally there is a Refresh button in order to bring in the latest job data.



Completed Jobs

Clicking on a completed job will bring up the Job Details screen from where the PDF can be downloaded. The job can also be downloaded in JSON or CSV format if desired.

Clicking on any of the completed steps will bring up the Step Details page. The Step Details page will contain information on that step including the started/completed times and the Step ID. If location settings are enabled on your **WFP App**, this will also be displayed.



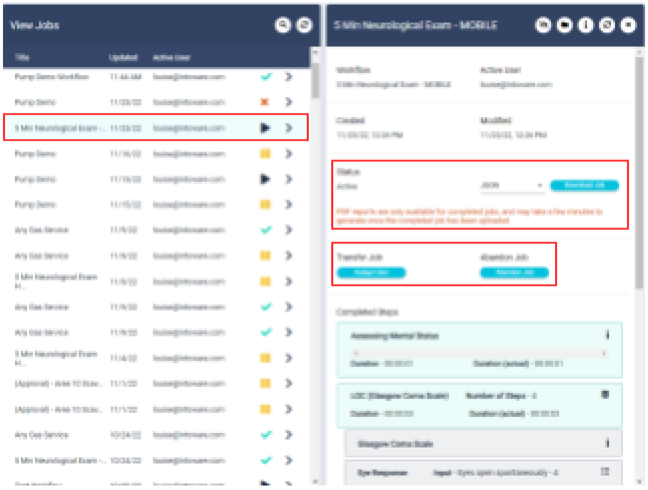
At the bottom of the Job Details page you will see the option to Delete Job if permissions allow.

In Progress/Paused Jobs

Jobs that are either IN PROGRESS or PAUSED will only have the option to download the data in JSON or CSV format. PDF download is not available.

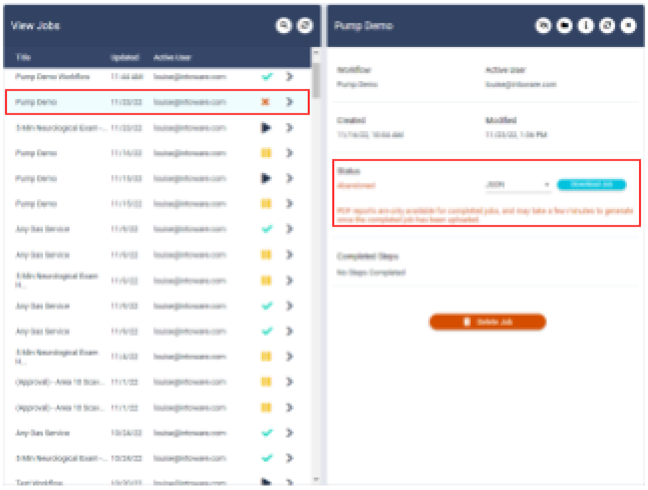
Jobs can be transferred to other users by clicking on the Transfer Job button from this panel. There is also the option to Abandon the Job.

Scrolling down to the bottom of the Job Panel will give the user the option to Delete Job if permissions allow.



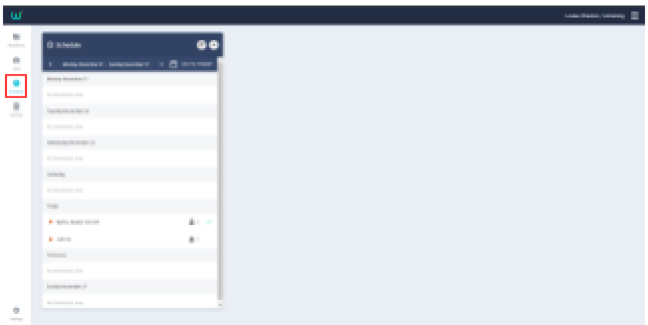
Abandoned Jobs

Abandoned Jobs can only be downloaded in JSON or CSV format. They can also be deleted if permissions allow.



SCHEDULE

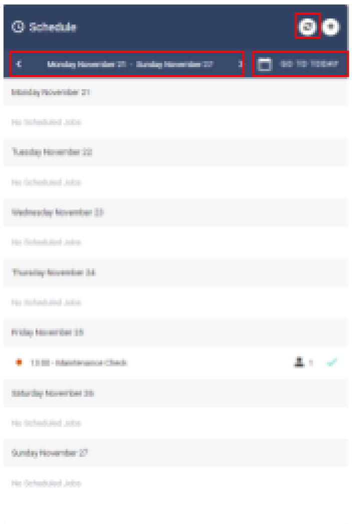
The Schedule can be viewed via the navigation panel on the left hand side of your Dashboard. The scheduler feature allows owners or administrators to schedule jobs to be completed by a specified user-determined either by their start date or an open-ended date.



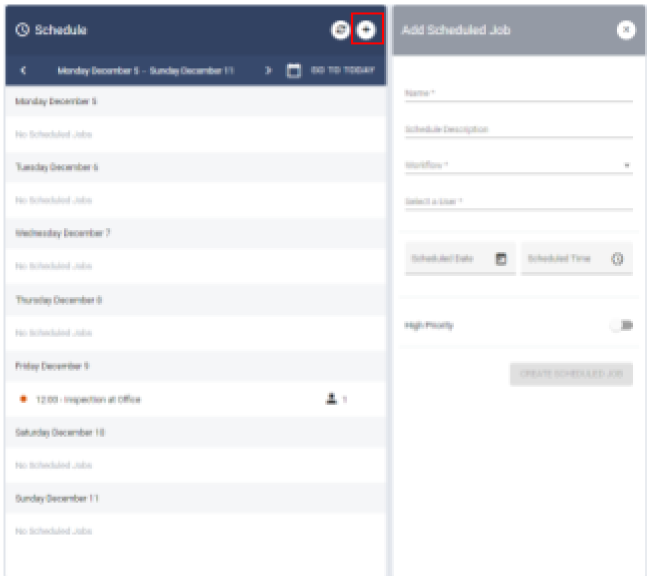
The Schedule Panel will show a list of scheduled jobs in a weekly view. To change which week you are viewing, select the arrow to either go back to view historic scheduled jobs and their status or forward to see future scheduled jobs.

To refresh the list, select the refresh button in the top navigation bar of the scheduler panel.

To navigate back to the current week, select go to today, this will bring you back to your current week view.



To schedule a job, select the plus button in the top navigation bar of the scheduler panel. This will open the add scheduled job panel where you can enter your job details and select the workflow template that should be attached to the job.



Name
Give the job a name. This might be a simple name or it could be a work order number for example if your business has a specific reference to use.

Schedule description
Give the job a short description so that the assigned person is clear on what they have to do.

Workflow
Select the workflow that you would like the user to follow from the dropdown list of live workflows.

Select a user
From here you can select an individual user that you wish to assign this scheduled job to. The selected user must be added to the workflow to enable them to see the scheduled job. (see [SETTING WORKFLOW PERMISSIONS](#) for more information).

PLEASE NOTE: If the user is not added to the workflow an error message will flag up when you select Schedule Job, this will prompt you to add them, select 'yes' and this will add your selected user to the workflow.

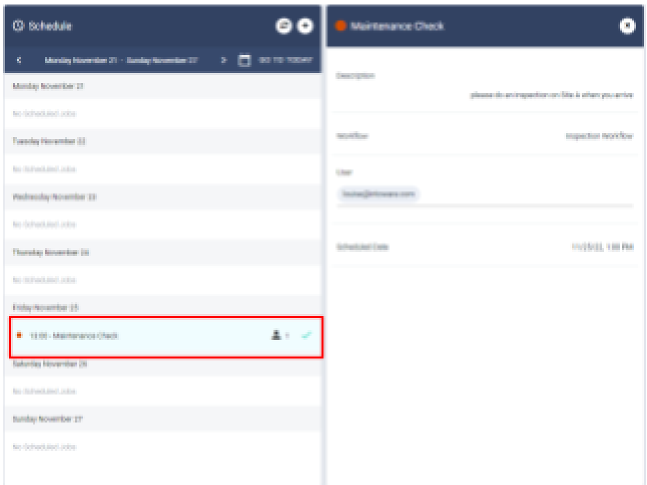
Start date and time
Select the date you want the job to start by. Once a date is selected you can change this date by clicking on the date, this will open the calendar for you to select an alternative date. If you do not want to add a scheduled date you can leave this empty or select clear the scheduled date.

To set the time you want the job to be completed by simply type the time in. The format for this is 24 hours and so 5 am is 5:00 and 5 pm is 17:00.

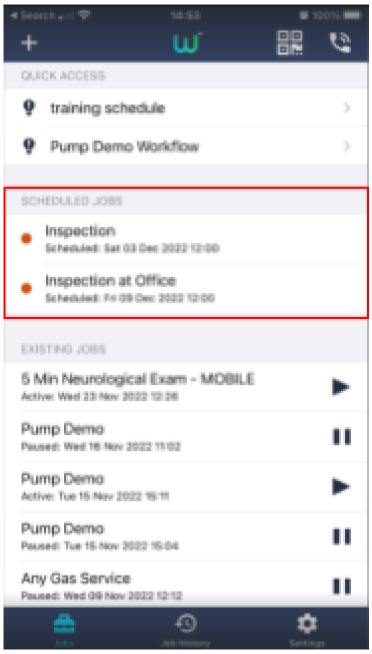
Priority
Preset the priority of the job by using the toggle. A red icon is shown against high priority jobs in the application so the user can select the next work item correctly.

Once you have entered the above you can select CREATE SCHEDULED JOB'.

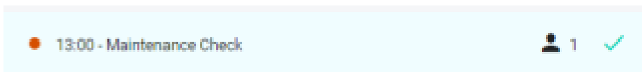
To view the scheduled job you can return to the main scheduler panel, navigate to the date that you scheduled the job to be completed by and select the job you want to view.



Scheduled jobs will show on the user's WFP APP when they log in.

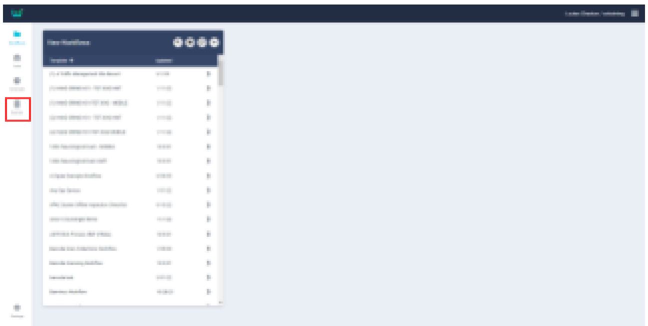


When the job is completed the Schedule Panel will update to show a tick.

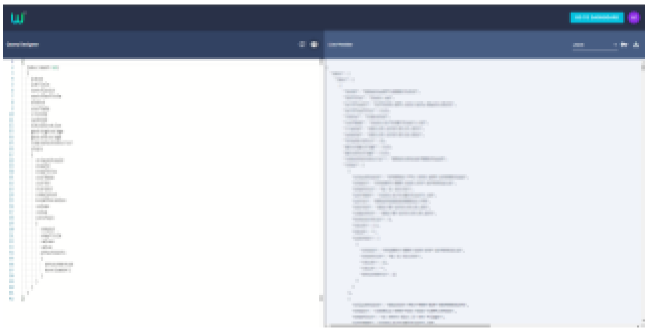


QUERIES

If permissions allow, Queries can be accessed via the navigation panel on the left hand side of the Dashboard.



The Query Designer can be used to test GraphQL queries against the data in your WorkfloPlus Team. A default query is provided in the left panel and the resulting data is presented in the right panel.



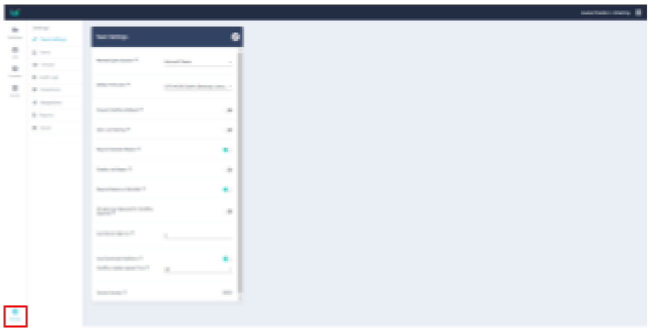
Once you have written your query you can export your WFP data to other systems via an integration.

See https://intoware.github.io/workfloplus-docs/ for further information on writing queries and extracting data from WFP.

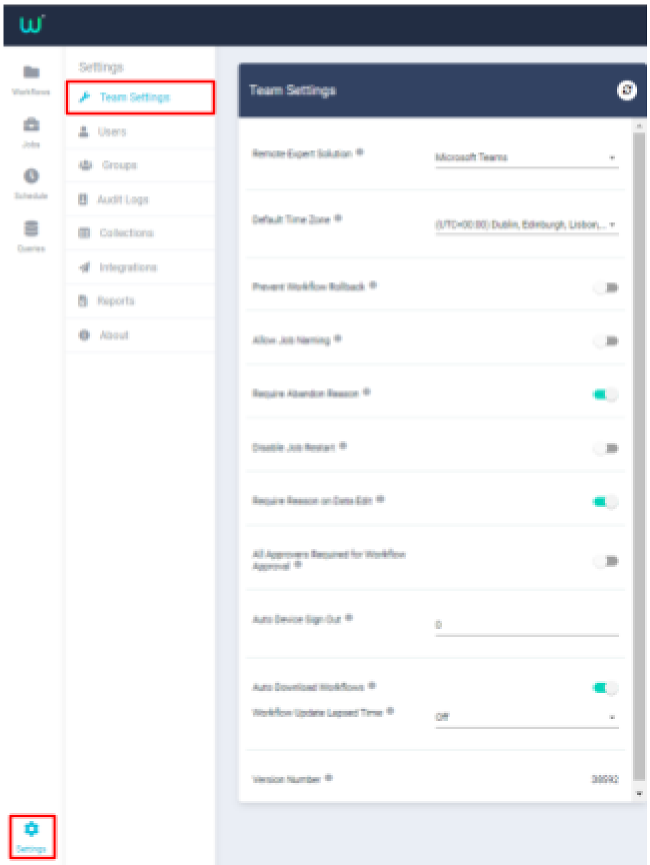
PLEASE NOTE: If you write a new query it will not be saved if you exit the Dashboard. We recommend that you keep copies of any queries you have written and keep them in a separate file for future reference.

SETTINGS

If permissions allow, **Settings** can be accessed via the cog in the bottom left hand side of the Dashboard.



Team Settings



Remote Expert Solution
WorkfloPlus has the ability to connect with 3rd party remote expert solutions, for example, Microsoft Teams. If this option is toggled on, the user can call out during a job to get assistance if needed.

Default Time Zone
Select the default time zone that you would like your reports and emails to display. Once selected this will update automatically.

Prevent Workflow Rollback
If enabled, old Workflow versions can no longer be activated.

Allow Job Naming

Allows users to name their jobs. If not selected the jobs will take the name of the Workflow being run.

Require Abandon Reason

When enabled, users must provide a reason when abandoning a job.

Disable Job Restart

When enabled, users will not be able to restart jobs.

Require Reason on Data Edit

When enabled, users will have to give a reason if they make any changes during a job.

All Approvers Required for Workflow Approval

When enabled, all users with Approval permissions are required to approve a Workflow or Workflow version before it can become available. If a Workflow approval is in progress when this setting is activated, the setting will not apply to that Workflow (only new versions will be affected).

Auto Device Sign Out

How long in minutes the device must be inactive before it is signed out of Workfloplus.

PLEASE NOTE: If Auto Device Sign Out is activated and the device signs out before a connection to the server can be established then job data could be lost.

Auto Download Workflows

When enabled the **WFP Apps** will automatically download new workflows and versions when they are added to the team.

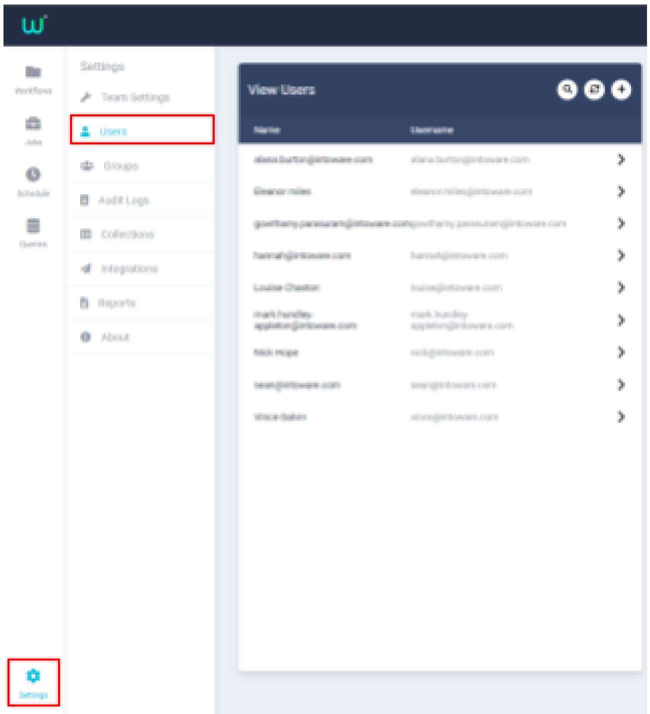
Workflow Update Lapsed Time

The time that a device can be offline without checking for Workflow updates.

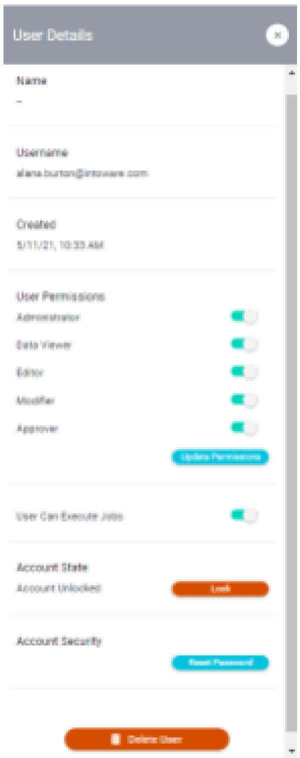
Version Number

WFP Dashboard version number.

Users



Depending on permissions you will be able to click through and view permissions for each user on the team and adjust them if necessary. The user can also be locked or deleted and their password reset.



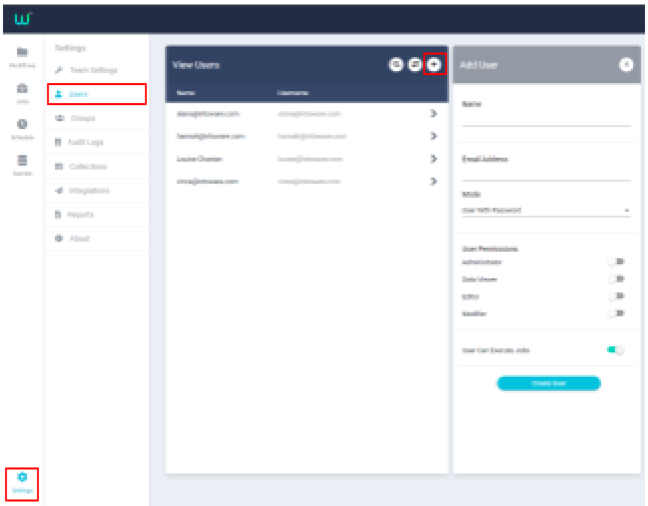
PLEASE NOTE: Note: If a user is deleted from your WorkfloPlus team, any jobs that have previously been run by this user will display 'Unknown User' in the job summary. If you want to remove a user but still retain the user information in the job summary, then we recommend that you Lock the user account, as opposed to deleting it.

Creating a New User

New users can be created inside the Dashboard Settings Menu by an Administrator.

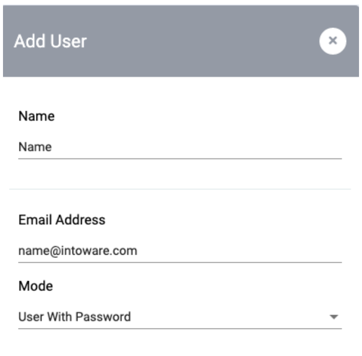
Clicking on Users from the Settings Menu will open the View Users panel. The default view is a searchable list of all Users.

Select the plus button at the top right-hand corner of the view user panel (insert button image), this will open the Add User panel.



Add User

Type in the user's name and email. Their email will become the user's WorkfloPlus username.



Mode

if 'User with Password' is selected, a password will be generated upon creation of a new user account. The password MUST be copied and saved as for security reasons the password is no longer available after the panel is closed.

If 'User with 3rd Party' is selected the user will not be given a password. Instead, they will be able to login using credentials from a supported 3rd Party Account (for example Microsoft or Google).

Set any relevant User Permissions:

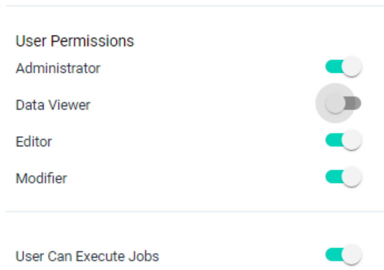
Administrators are able to see all jobs, users and workflow templates (only owners can give admin permissions)

Data Viewers are able to see all jobs and are able to delete or create jobs if they had other permissions (modifier and executor respectively)

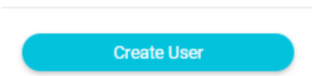
Editors can manage workflows

Modifiers are able to edit data on the server and delete jobs

To enable a user to perform jobs on a mobile device **"User Can Execute Jobs**" will need to be enabled (green). It is enabled by default.

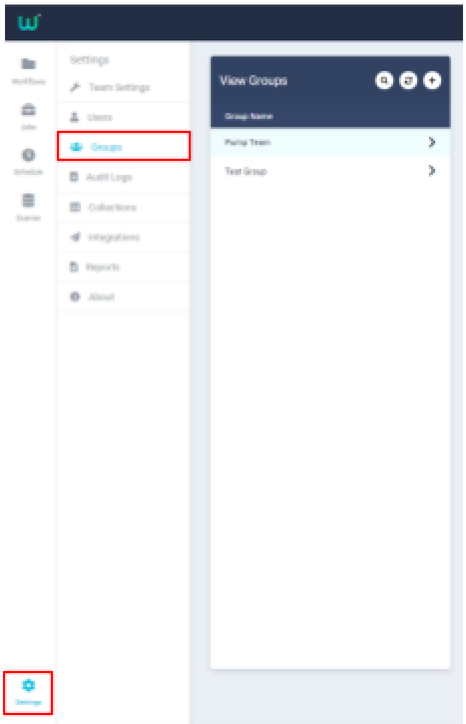


Once all information has been entered and options selected, click the Create User button to add a new user.



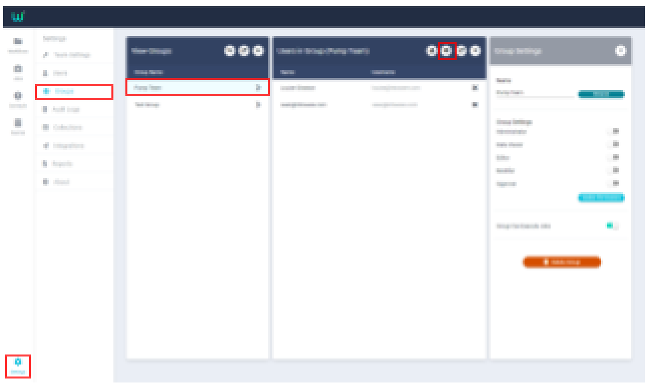
Groups

Groups of users can be created via the Groups Link. If a Group is created then it can be added to the Workflow permissions as opposed to entering names individually.



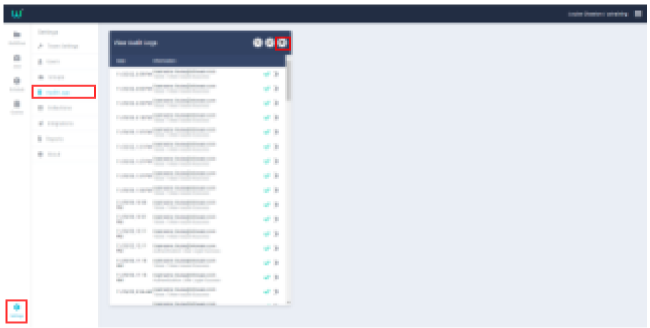
To create a new group click on the plus button in the View Groups panel, give your group a name and hit CREATE GROUP. You can then add users

Once the Group is created you can assign permissions by clicking on the Group name and then clicking on the settings cog at the top of the panel

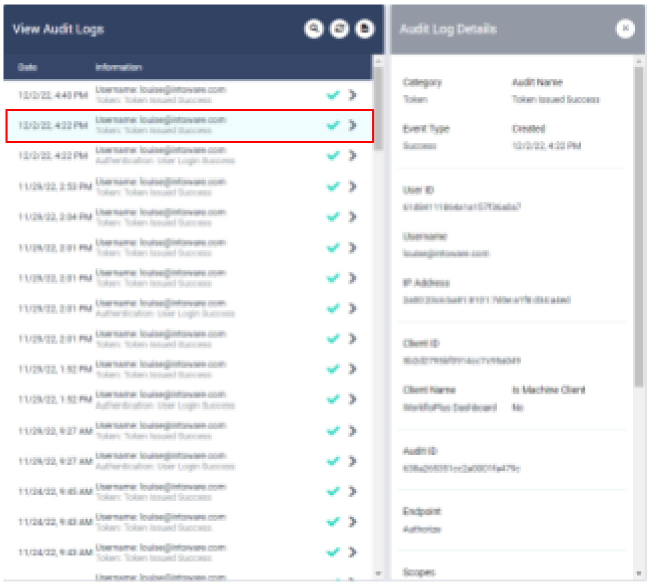


Audit Logs

Audit logs can be viewed and downloaded if needed via the Audit button.



Clicking on an item will bring up the Audit information panel which provides more detailed information on the user's activity.



Collections

PLEASE NOTE: this feature is no longer supported in V2.7. Further information can be found here if needed: https://help.workfloplus.com/a/solutions/articles/47001160213/edit?portalId=47000025234

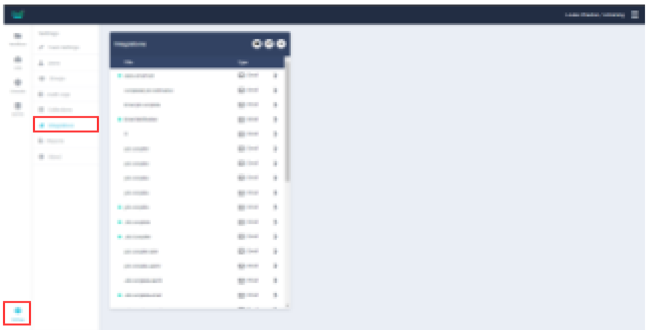
Integrations

Integrations (formerly triggers) can be configured to send data on to a downstream person(s) or application(s) when a job has been completed. WorkfloPlus offers two types of Integrations:

Email: Send an email containing details of a completed job onto one or more email addresses

HTTP: Send a POST request that contains all of the job data to a designated endpoint

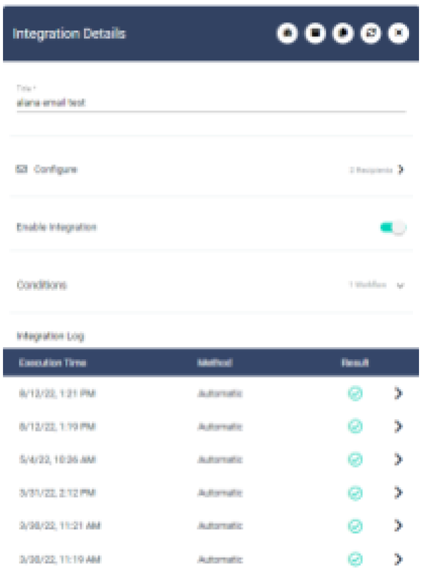
View Integrations by selecting Settings and then Integrations from the navigation panel.



From this summary panel, you will be able to view the Integration name and type. The blue dot highlights if the integration is active or not.

You can refresh, archive and add Integrations via this panel using the buttons in the view Integrations header.

To open the Integration details panel, click on the Integration you would like to view. This will open up the panel to the right of the list. From here you can view a summary of the Integration selected and how many times it has been executed.



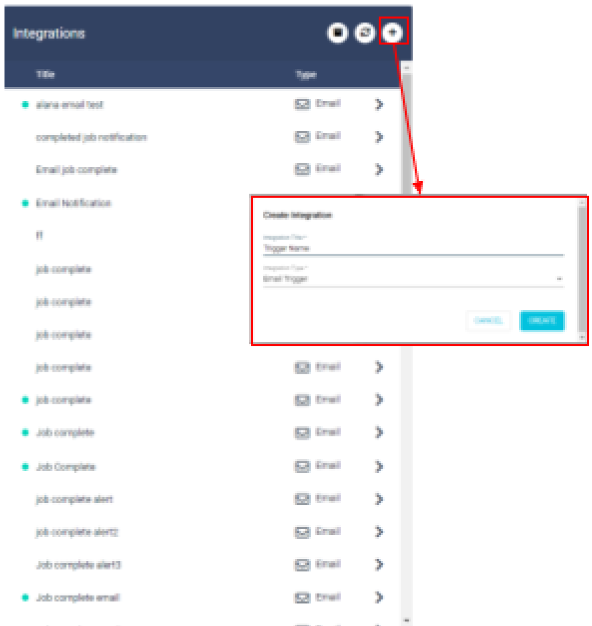
The buttons at the top of the Integration Details Panel allow you to test, archive, copy and refresh if needed.

Creating an Email Integration

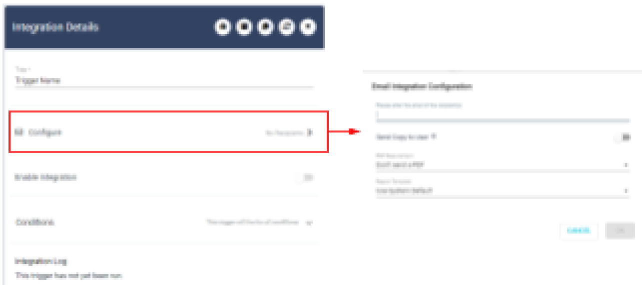
WorkfloPlus lets you set up multiple job reports that can be run against completed jobs. The email integrations (formerly triggers) system allows you to send your reports to whoever needs them, with complete flexibility. For example, if you have a health & safety pre-inspection prior to commencing work, a report covering only these steps could be sent to the on-site safety inspector. If you're doing an inspection of equipment and certain steps fail, you could pull out only the failed steps and send a report covering these to the maintenance manager. You can also send reports to groups of people.

PLEASE NOTE: to set integrations you must have either Owner, Administrator, or Editor permissions.

To create a new Email Integration select the plus icon in the Integrations panel header; this will open up the Create Integration panel to the right. Give your trigger a name and select Email Integration from the dropdown arrow. Then hit CREATE.



You can then configure your Email Trigger by clicking on Configure:



The Email Integration Configuration Panel will ask you to enter the following information:

Email Addresses - please enter the email addresses separated by a comma.

PLEASE NOTE: email addresses do not have to be users on the WFP Team.

Send Copy to User - toggle this on if the user completing the job requires a copy of the PDF report as well.

PDF Requirement - there are 3 options

1. **Don't send PDF** - Select this if you do not want to include a report as part of an integration email. In this case, an email is simply sent stating that a job has been completed, but it does not include the report PDF

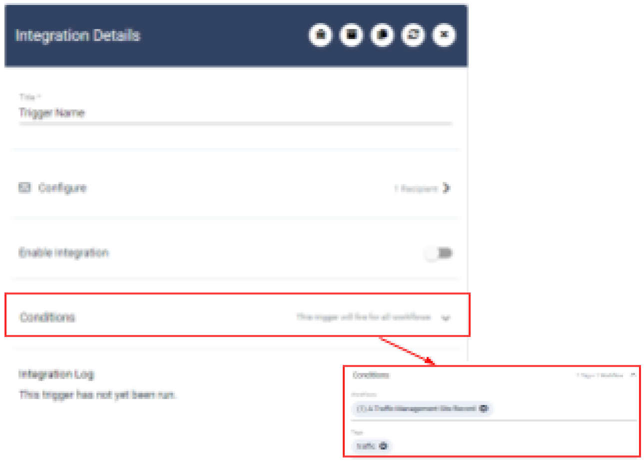
2. **Send a PDF** - Images and videos can take a while to sync up to the server depending on your connectivity in the field. Image thumbnails may not be imperative for your report and you may require your report to be sent quite quickly after the job has been completed. If so, you can select this option to receive the report quickly after the job is finished, even if all images/videos have not yet synced

3. **Delay for 5 minutes then send a PDF** - The image/video thumbnails may be imperative to the report and therefore you can select this option to wait for all image/video thumbnails to sync up to the server before sending the report.

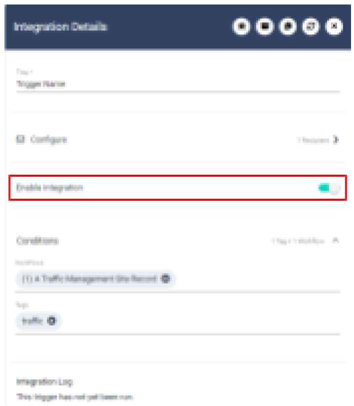
Report Template - the WFP default report template will fire automatically unless a different report template is selected.

Once all these settings have been completed, hit OK.

By default the Email Integration will fire for all workflows unless you specify otherwise. Clicking on Conditions will bring up another panel from where you can select a specific Workflow or Tag if needed.



The Integration finally then be toggled on or off as needed:



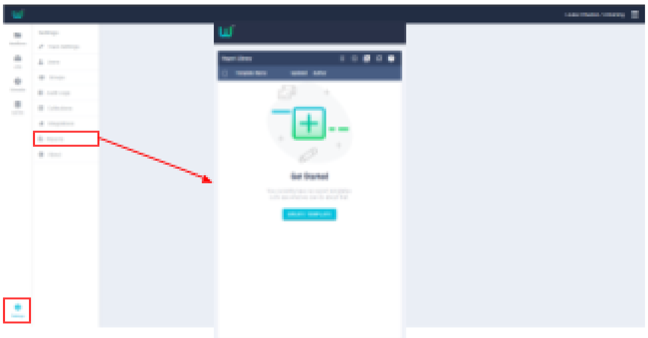
Reports

When a job has been completed, WorkfloPlus automatically generates reports. What a 'report' contains is entirely up to you. A report might be a detailed job report showing all the completed steps in the job (much like our default report template), it could cover a specific part of a workflow (such as a health & safety check), or it could even just be an automatically generated certificate.

Customised report templates are built using the WorkfloPlus report editor. It uses a mixture of HTML and CSS to build the template, and also takes advantage of Handlebars to pull in data conditionally. It is completely within your control.

Creating a New Report

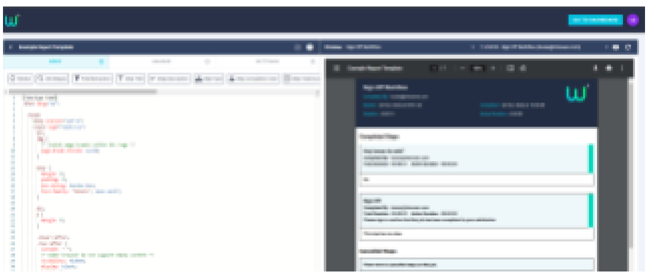
Start by navigating to the Report Designer by going to the Dashboard, then navigating to Settings, and clicking on the Reports button.



Start by clicking on the Create Template button. If you have already created report templates before, then you can click on the PLUS button in the toolbar to create a new template.

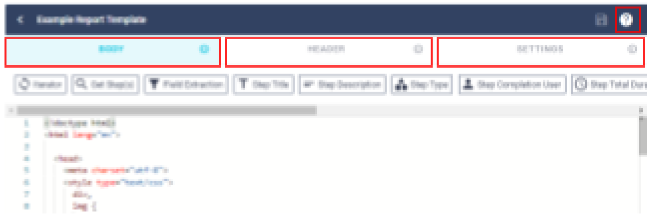
You will then be asked to enter a template name. This should not be the same as the name as any other report template in your Report Library. You can choose to create a new blank template or you can use an example template which already has some suggested code included.

Once you have entered a template name, click on the Save button to continue. At this point, the Report Template Editor will open. If you have selected Create with Example Template this will be filled in automatically with a boilerplate report (which is the WorkfloPlus default report template) and will preview the report using the last completed job in your team. This template contains all the steps in the job.



The Report Template Editor allows you to edit the body and header of your report template. You can also choose whether the report should be displayed in portrait or landscape, and set the report template as the team's default.

You will see references in the following instructions to the 'Body', 'Header' and 'Settings' tabs. These are the tabs at the top of the left-hand section. The Header sections cover the section at the top of each page of the report (shown in dark blue in the example above), and the Body section covers the rest of the content on each page of the report. There is also a link to the report settings and a ? 'Help' button.

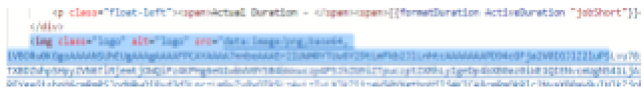


If you set the template as the team's default, when you download a job's report from the Dashboard or app, the team's default template will be used rather than the default WorkfloPlus report template. This can be done via the Settings tab.

Changing the Logo

To better secure WorkfloPlus, the linking of external images is forbidden. Instead, images must be encoded.

To change the logo of the report, go to the Header tab in the Report Template Editor and look towards the bottom for a line like the following or alternatively just do a simple search for the word 'logo'



To encode an image to embed as a logo, you must first have a png or jpg copy. The use of svg format images is not fully supported and may give undesirable results.

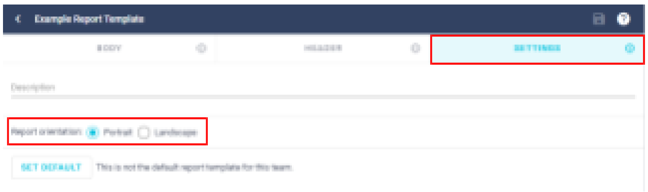
With your image file handy, visit a [Base64 Image encoder]() and either drag/drop your image anywhere on the page, or use the file browser.

Once your image has been encoded, click copy on the HTML usage code, then back in the Report Template Editor paste this content into the logo section of the header ensuring the paste is between the speech marks.

After pasting in the HMTL code into your report editor please delete <img src= from the beginning of the code for it to work correctly. If there are any issues with the code then it will be displayed in red text. If the text is blue then the new logo should be displayed in your sample report on the preview screen.

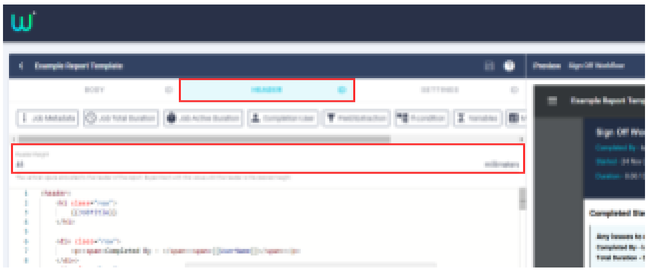
Changing the Page Orientation

To display the report in landscape mode, go to the Settings tab in the Report Template Editor, and select Landscape for the Report Orientation.



Changing the Size of the Header

To change the height of the header, go to the Header tab in the Report Template Editor. Underneath the Preset Bar, you will see an input for the header height in millimetres. This sets the amount of vertical space at the top of each page that is allocated for the header of the report. You can then change this value until the header is the desired height in your report, once completed, this will be reflected in the preview panel.



Changing the Font

To change the font of the report, go to the Body tab, and then find or search for the body selector:

```
body {
  margin: 0;
  padding: 0;
  box-sizing: border-box;
  font-family: "Roboto", sans-serif;
}
```

At the bottom of that block of code, you can change the font-family property to suit your needs. For example:

```
body {
  margin: 0;
  padding: 0;
  box-sizing: border-box;
  font-family: "Times"
}
```

Changing the Report Colours

To change the header and background colour go to the body tab and then find or search for the header selector:

```
header {
  background-color: #222d43;
  color: #fff;
  padding: 1rem;
  padding-bottom: 2rem;
  position: relative;
  margin-bottom: 1rem;
}
```

You can then change the code from #222d43 to your branding colours using a [HEX Code]() of your choice.

Changing the Font Sizes

To change the default font size of the template, go to the Body tab, and then find or search for the body selector:

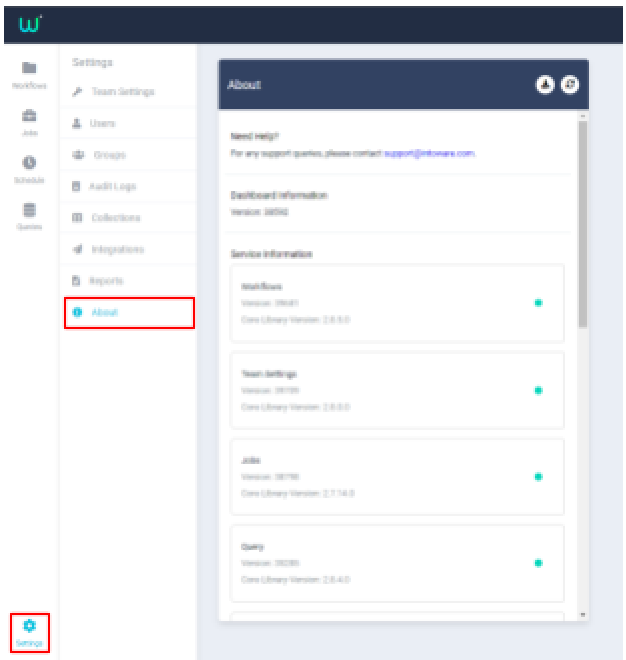
```
body {
  margin: 0;
  padding: 0;
  box-sizing: border-box;
  font-family: "Times"
}
```

Add a new CSS property for font-size with the appropriate value to that block of code. For example:

```
body {
  margin: 0;
  padding: 0;
  box-sizing: border-box;
  font-family: "Roboto", sans-serif;
  font-size: 24px
}
```

About

This section provides Dashboard and Service information. There is also a link to Support, if needed.



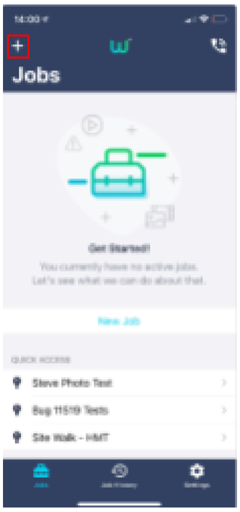
RUNNING JOBS USING WFP APPS

STARTING A JOB

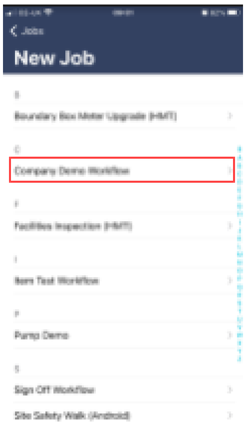
Starting a new job on WorkfloPlus is quick and easy. Open WorkfloPlus on your Android or iOS app.

If this is the first time you have launched WorkfloPlus on your device you will not see any jobs in your quick access bar or job history.

To start your first job simply click on the plus icon from the home screen and select the workflow that you want to complete from the A-Z list.



Select the workflow you want to complete from the A-Z list:

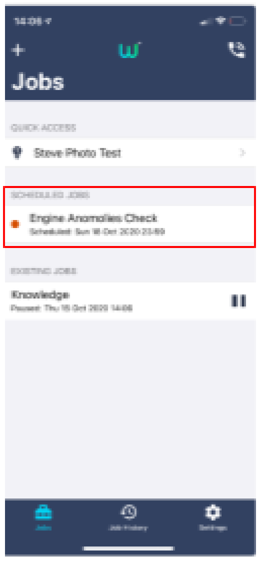


Then click to START JOB:

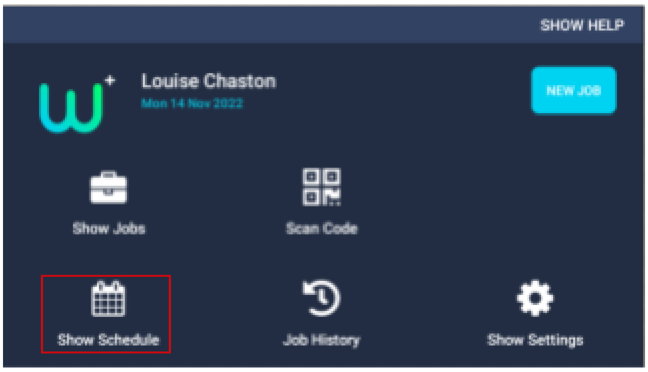
If you have completed a job before on this device you will see a list of jobs in your **QUICK ACCESS** bar, WorkfloPlus is intuitive and will list a number of frequent jobs to enable you to get to the job you want to complete quickly. Simply select the workflow from the list and select 'start' job.

If you're using the HMT-1 app then from the home screen say **"NEW JOB"** and select the workflow that you wish to open.

If a job has been scheduled to start on a specific date and time this job will be available to start from your home screen.



To view scheduled jobs on the HMT, simply say **"SHOW SCHEDULE"**.

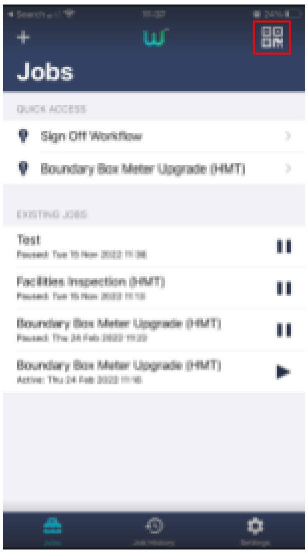


Scanning QR Codes

WorkfloPlus includes the ability to begin a new job based on a workflow by scanning a QR code. This enables companies to place QR codes on equipment, certain locations, or in other places as it relates to specific tasks. The user can simply scan a QR code to automatically download the correct job and start the work instruction or inspection straight away.

PLEASE NOTE: you will need access to the workflow to be able to successfully scan and access the job.

When using WorkfloPlus on a mobile phone, on the Jobs screen, select the QR link, which will open your phone's camera.



Using the camera, scan your QR code. When the image is recognised, the Job Details page will open. On this page, select Start Job.

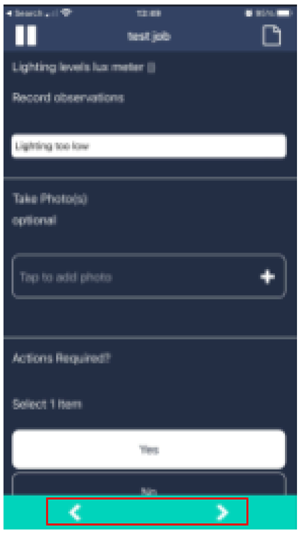
To launch a Workflow using a QR code using an HMT, on the WorkfloPlus home screen, give the instruction **"SCAN CODE "** to open your HMT's camera.

Using the camera, scan the QR code. When the image is recognised, the Job Details page will open. On this page, give the instruction **"START JOB"**.

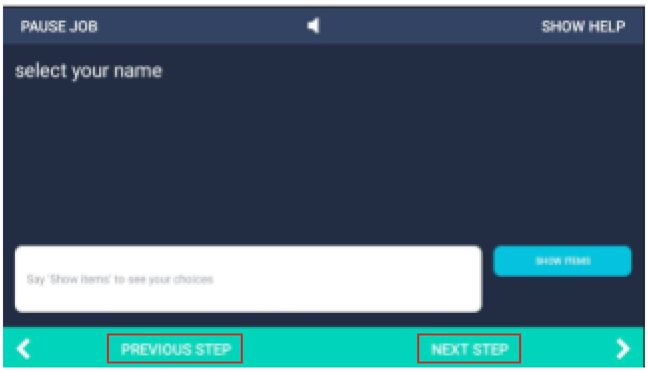
DURING A JOB

Navigating Forwards/Backwards

WorkfloPlus jobs are sequential which allows you to easily move forwards and backwards through step by step instructions. If you're using the Android or iOS apps then you can click on the forwards and backward arrows at the bottom of the screen to navigate through the job.



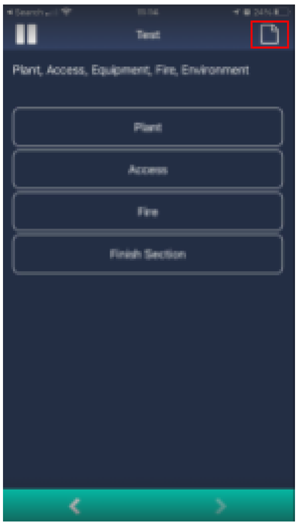
If you are using the HMT-1 device then you can say **"NEXT STEP"** and **"PREVIOUS STEP"** to move forward and backwards.



Adding Notes

When using a mobile phone to record a job using WorkfloPlus, on each step, there is the option to add a note for that step. This is designed to capture any additional information relating to the task the user is completing, or to raise an issue or follow up work.

To access Notes, click on the top right hand side of the screen during your job. On Android it will be 3 dots. To start adding a note, tap the screen to activate the keyboard then write your note. When it is complete, select the tick to confirm and save the entry.



To view a note added to a step in WorkfloPlus, on the step you wish to check, you also select the side menu and then Notes.

Notes can also be viewed using the **WFP Dashboard**. On the Dashboard, select Jobs, and find the relevant job from the list presented and select it to open a page that includes a record of each step. Select the step you wish to view to open a further page and, if notes were added to that step, they will be shown in the Notes field.

PLEASE NOTE: the notes facility is not available when using a Realwear HMT device.

Barcode Scanner

WorkfloPlus enables you to connect to a supported Bluetooth scanner for scanning items with a barcode.

PLEASE NOTE: Ensure your Bluetooth is turned on in the Phone. If you reset your Bluetooth, the scanner needs to be re-selected from the list on the settings page.

First, you will need to pair your Bluetooth scanner inside of your phone's Bluetooth settings screen. Once paired and connected, your scanner will be automatically selected when you are in the barcode step and will automatically disconnect when you have completed the job. If the scanner is disconnected while in a job it will automatically attempt to reconnect (subject to sufficient battery charge). If reconnection is not successful, "Device is Disconnected" is shown.

How to Enable & Use Text to Speech

WorkfloPlus enables you to activate a text-to-speech (TTS) mode. When this is active, your client device will read out step titles and descriptions as you progress through a job. This is useful if you want to minimise the amount of time you need to look at your screen. The options to enable TTS for step titles and descriptions are available while a job is in progress.

On Android, the "Speech On" option can be found in the same in-job menu as the step notes (3 dots top right side). Selecting the option again will turn it off.

On the HMT, this option can be enabled by saying **"SPEECH ON"** and disabled by saying **"SPEECH OFF"**.

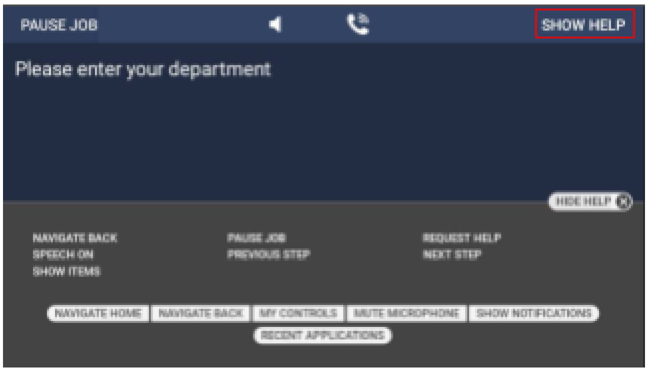
PLEASE NOTE: TTS is not currently supported on IOS.

PLEASE NOTE: TTS is off by default but if turned on it will remain active until you turn it off. This means if you enable it and close the app it will still be active when the app is reopened.

Voice Commands (HMT)

The Realwear HMT app is controlled using your voice, keeping your hands free for the job you're completing. The voice commands are designed to be natural and simple to remember, but should you struggle to know what commands are available, saying **"SHOW HELP"** will bring up a list that is available on the current page.

This help window will also show useful system commands that are not a part of WorkfloPlus but may be useful for navigation, such as **"NAVIGATE HOME"** and **"RECENT APPLICATIONS"**.



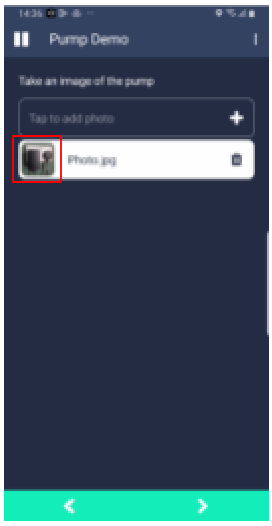
Say **"HIDE HELP"** to remove this panel.

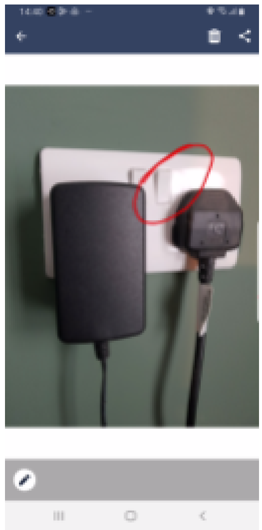
Photo Annotation

You can easily annotate images within the workfloplus mobile app, using the annotation tool. This allows you to draw on a photo taken or an image selected within a photo step. For example, you may want to draw attention to a certain element of an image or highlight something for attention when completing a job.
Once the image is captured/selected and annotated, this will show as part of the report once the job is completed.

PLEASE NOTE: If you are using a standard report template this will automatically show in the report.

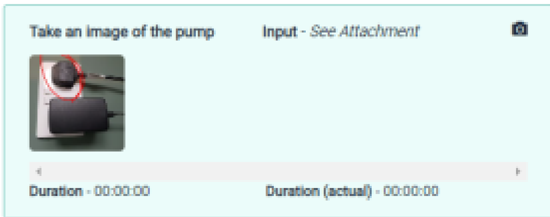
Take an image using your device camera or select an existing image from your device gallery as part of the photo step. Once the image is showing on your list, tap the image to open it. Once opened you will see the annotation toolbar at the bottom of the image. Make any changes you want and then either click the back arrow (Android) or Done (iOS) to save your annotations.





PLEASE NOTE: It is not possible to amend existing annotations however you can add more annotations or completely delete all annotations, but can't undo or redo actions on your last annotation round.

The annotated image will be available in the job panel and final report.



PLEASE NOTE: It is not possible to annotate images taken on an HMT.

Using Remote Expert

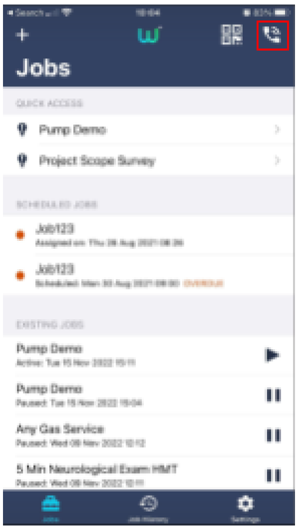
If Remote Expert is enabled in Team Settings, users have the ability to call out for help using the Remote Expert assistant, either before or during a job.

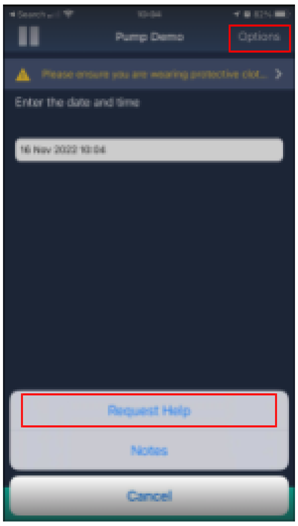
On a mobile device this will be displayed as a phone icon on the top right hand side of the home page and via Options (iOS) or 3 dots (Android) on the top right hand side during a job.

On an HMT the option will be displayed as a phone icon on the home page and as a phone icon on the top of the screen during a job.

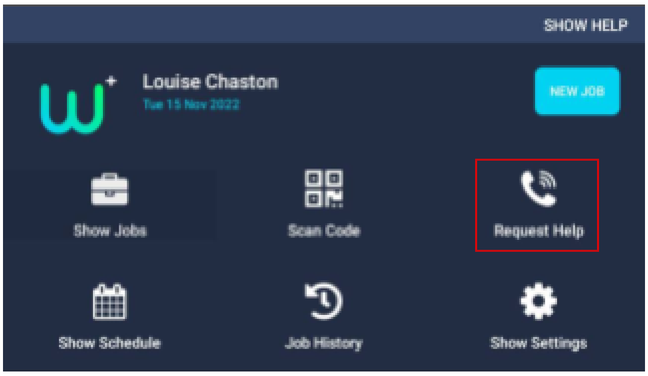
Remote Expert enables the user to speak with a 3rd party and share their screen if needed to assist them with completing their job.

Activating Mobile Remote Assist before and during a job:

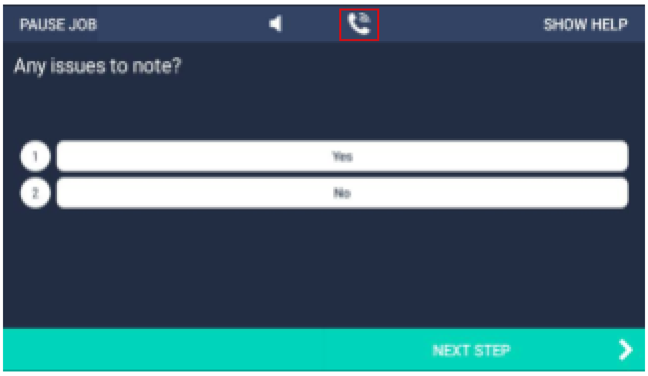




Activating HMT Remote Assist before a job has started:



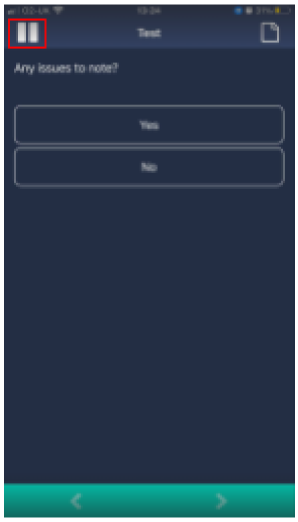
Activating HMT Remote Assist after after a job has started:

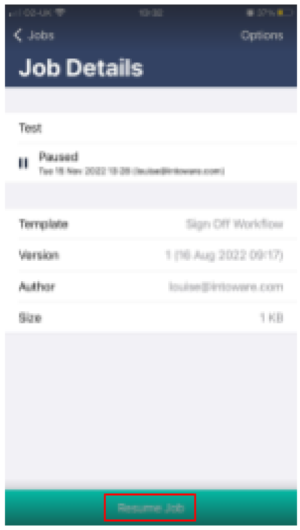


PLEASE NOTE: Licences will be required by both the user and the Remote Expert for this to run.

Pausing & Resuming a Job

It is possible to pause a job at any point by clicking on the Pause button on the top left hand side of the screen. You can resume the job from this screen by clicking on the Resume Button at the bottom.

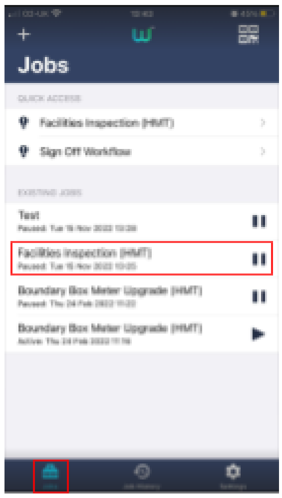




On the HMT say **"PAUSE JOB"** to pause the job and **"RESUME JOB"** to carry on.

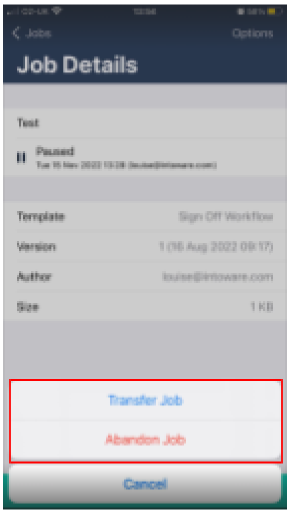
Paused jobs can also be accessed via the Jobs menu on the Homepage of WorkfloPlus. On the HMT say **"SHOW JOBS"** and then say either **"SELECT ITEM #"** or the workflow title.

On a mobile device click on the Jobs button at the bottom of your screen and simply click on the job you wish to restart.

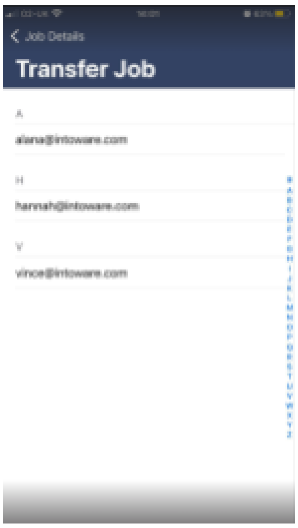


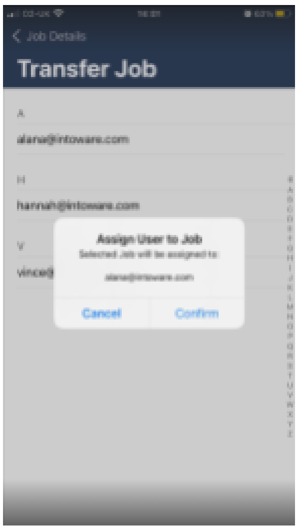
Transferring or Abandoning a Job

To transfer your job to another user on a mobile device select the Pause button on the top left side of the screen and then click on the top right hand corner to bring up the options.

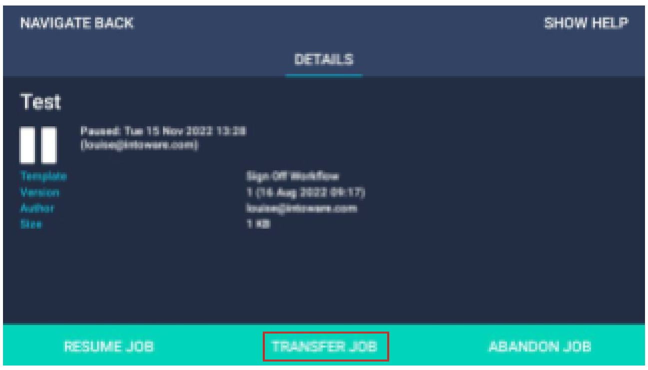


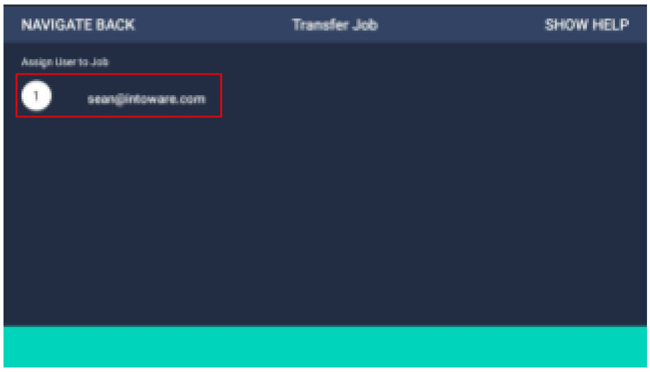
Select Transfer Job and choose the user from the list and confirm.





On the HMT say **"PAUSE JOB"** then **"TRANSFER JOB"** and select the user and confirm.

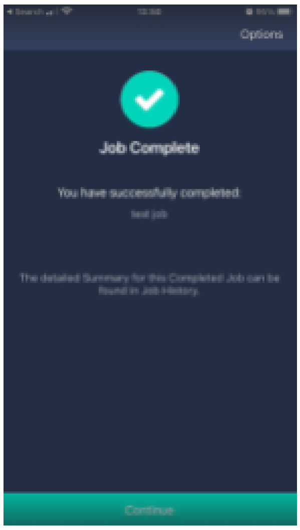




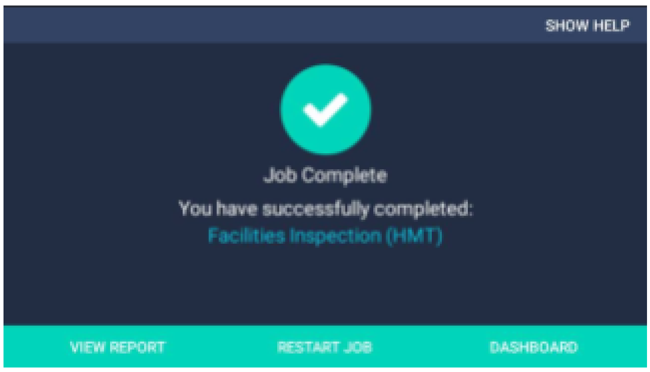
Abandoning a job follows the same procedure except you need to select **Abandon Job**. You will be asked to confirm if you want to continue.

FINISHING A JOB

Once you have completed the final step of your job you will be taken to an end of the job screen. Hit Continue to finish.



On the HMT you should say **"DASHBOARD"** to take you back to the main screen.

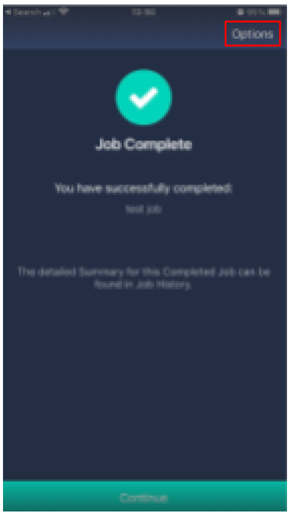


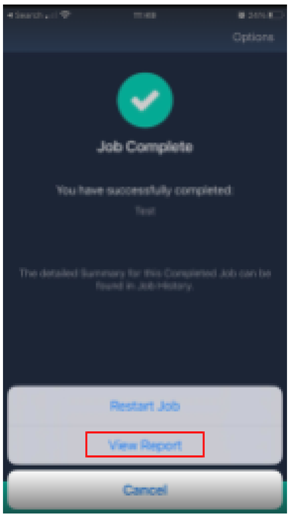
Downloading Reports

When using a mobile device or a Realwear HMT, the user can download a report relating to any completed job either at the end of the job or in the Job History section of the app.

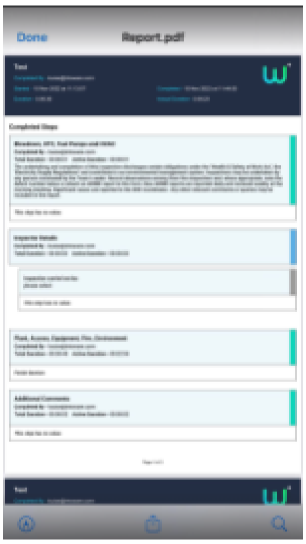
When using a mobile phone, the job may be accessed in 2 ways.

Firstly clicking on Options on the Job Complete page will open up a menu from where you can download the report.

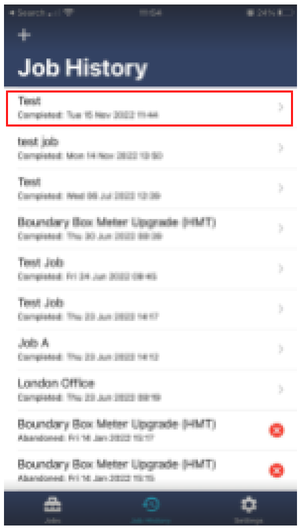


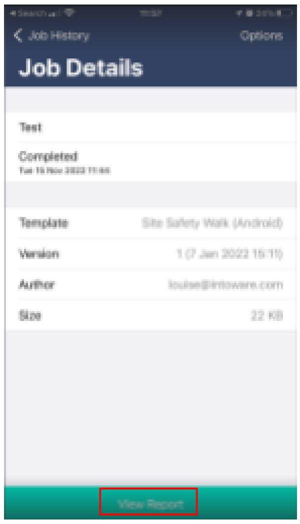


When selected, a PDF report for your job opens. The default report displays a summary of the job, including the job name, your user name, the date, and job status. Beneath the summary, each step is listed. For each step, the details include the step name, duration, description and, if appropriate, your decisions, inputs and step notes.

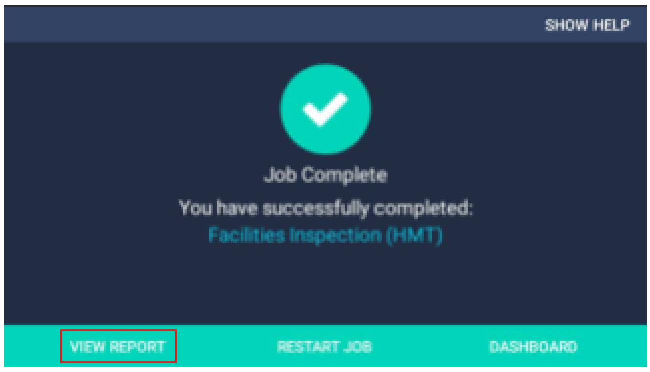


Secondly on the WorkfloPlus History screen, you can view reports for completed jobs. Select the relevant job from the list of your jobs to open the Job Details screen, then select View Report to open a PDF of your report.





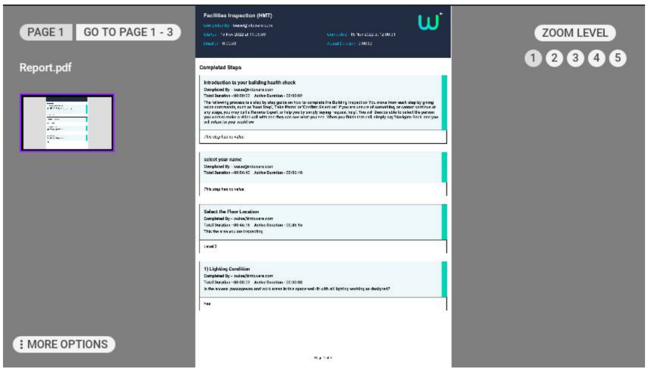
When using an HMT, there is a **"VIEW REPORT"** option on the screen confirming that your job is complete. This opens a PDF of the report, which is similar in content to that described earlier in this section.



Reports are also available in Job History. From the WorkfloPlus home screen, select **"JOB HISTORY"** then select the job you wish to view. Selection can be made using the job name or its item number.

Say **"VIEW REPORT''** to open the report PDF.

If the report is not clearly legible, different zoom levels may be selected.



It is also possible to use the WorkfloPlus Dashboard to view a job report. See Completed Jobs.

Syncing Data

WorkfloPlus will automatically sync your job data with the server (whether cloud-based or local). Once a job has been updated, your device will attempt to sync with the server automatically. This requires you to be connected to the internet, or if you're on a local server environment, to be connected to your network. The status of job sync can be seen next to a job on the active and completed job lists as well as on the job details page. There will be an alert if the job is waiting to sync. If the job is actively syncing then there will be a spinner. Once the spinner is gone the job has finished syncing to the server.

PLEASE NOTE: While a job is in the process of syncing or pending sync then auto-logout will not take place in order to preserve data. If you attempt to logout while either a job is syncing or waiting to sync you will see a warning message. While you can continue, if you log out of the app while syncing is incomplete then this will result in job data being lost.

CONTACT SUPPORT

If you need assistance, please contact support@intoware.com or call +44 (0)115 9778969.