Field Notes Quick Reference Guide

This topic provides a reference for the Project Center **Field Notes** activity center.

Purpose

The **Field Notes** activity center is a storage location for data collected by team members using the **Field Notes** mobile app that is synchronized from their phones or tablets.

Audience

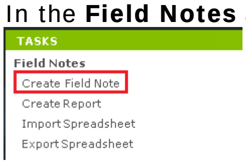
Construction or design professionals who are back at their desk and are reviewing notes captured while they (or others) were in the field.

Key Features

- Centralized, backed-up storage that takes files off of individual mobile devices and makes them available to the full team.
- Media files (photo, video, audio) are integrated with notes typed on the device, as well as automatic metadata about author, date/time taken, and location.
- Photos marked up on the mobile app are stored in both the original and annotated versions.
- Bi-directional workflow to connect field notes to other Newforma Project Information Management (PIM) items, such as action items, daily reports, site visits, and RFIs.

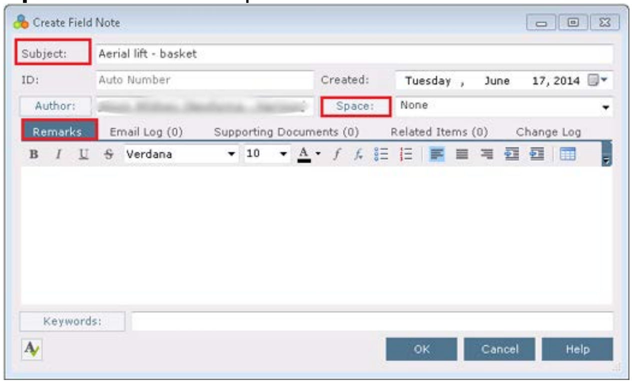
To create a field note

1. In the **Field Notes** activity center, select **Create Field Note** in the **Tasks** panel.



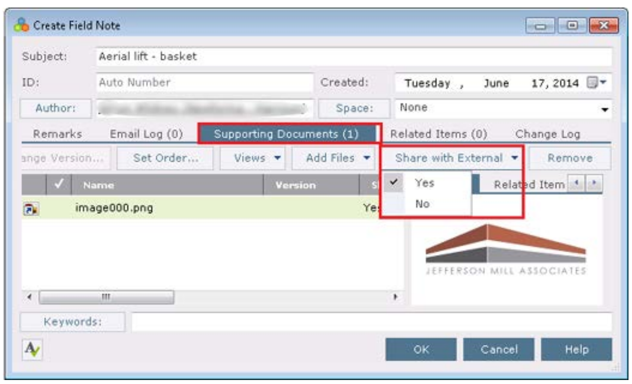
The vast majority of notes will be created from the mobile app and will sync back to this location. The activity center is more typically used to clean up or expand descriptive text.

2. In the **Create Field Note d**ialog box, fill in the **Subject** and add details you want in the **Remarks** field. Fill in a **Space** from the drop-down list if needed.



3. You can attach media files (such as image, video, or audio) on the **Supporting Documents** tab.

> *Supporting documents are available by default for internal users on the Info Exchange website. To share them with external users, select the file, then select **Share with External** and select **Yes**, as shown below.*



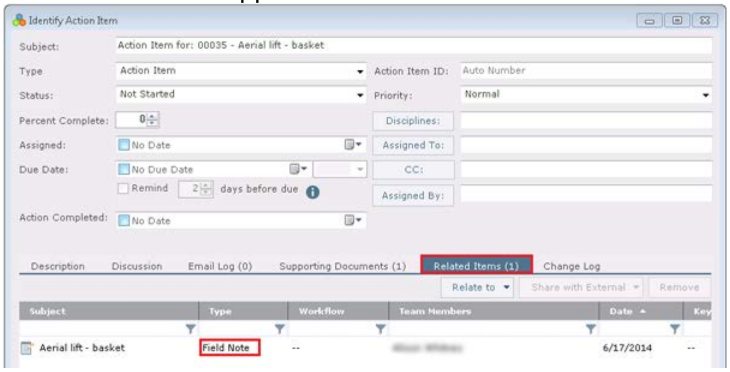
To create another project item from a field note

You can create other project items including site visits, daily reports, action items, RFIs or punch list items right from the **Field Notes** activity center.

1. From the **Field Notes** activity center, select a field note and point to the **Create >** task in the **Tasks** panel. Select the type of item you want to create.

> *If multiple field notes are selected, then only **Site Visit** and **Daily Report** are available.*

2. Information from the field note is copied into the new item being created. Any supporting documents are included and the field note appears on the **Related Items** tab. The source field note stays intact.



Edits made in the new item do not change the linked field note.

To incorporate field notes into site visits or daily reports

You can select field notes to copy into the **Observations** tab of a site visit or daily report.

1. From the site visit or daily report **Observations** tab, select **Add From Field Notes**.
2. Sort or filter to find the field note(s) you want, select them, and then select **OK** to copy them into the **Observations** tab. Edit any observation text and complete additional fields as needed. Any media from the field note is copied to the **Observation** tab's **Supporting Docs** field (not to the **Supporting Documents** tab).

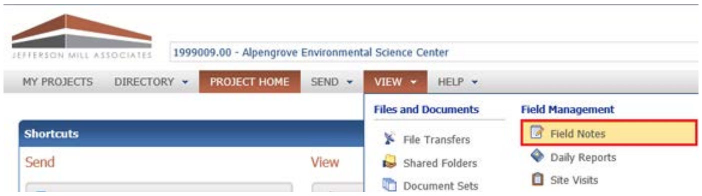
Changes made to the observation do not affect the source field note.

To view field notes on Info Exchange

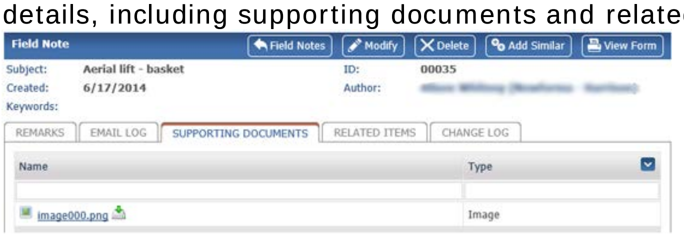
Internal and external project team members can view, edit, and create field notes from the Info Exchange website (depending on permissions).

> *By default, external users can only see field notes they created.*

1. Log into the Info Exchange website and select the project. Select **View > Field Management > Field Notes** from the menu bar.



2. Select the **Subject** of a field note in the **Field Notes log** to open the **Field Note page** and view its details, including supporting documents and related items.



> ***Note:*** *Supporting documents are available by default for internal users on the Info Exchange website. To share them with external users, the file has to be marked to* ***Share with External*** *from the field note's* ***Supporting Documents*** *tab in Project Center.*