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 **Capture** 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.
 - Field Notes Create Field Note Create Report Import Spreadsheet Export Spreadsheet

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 dialog 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.

💑 Create Fiel	d Note		-	
Subject:	Aerial left - basket			
ID:	Auto Number	Created:	Monday , April 6, 2020	
Author:	Adam Klose 24 (Jefferson Mill Associates 24)	Space:	None	~
Remarks	Email Log (0) Supporting Documents (0) Related	d Items (0) Change Log	
В <i>I</i> <u>U</u>	S Verdana \checkmark 10 \checkmark A \bullet f f, \ddagger	1= 🔳 🔳	= = = = 🖗 🛶 🌾 💪 😡	
1				
Keyword	s:			
\$			OK Cancel	Help

3. You can add 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.

å Create Fi	ield Note									-		\times
Subject:	Aerial left - basket											
ID:	Auto Number				Created:	Monday ,	April	6, 2	020			
Author:	Adam Klose 24 (Jeffe	rson Mill Ass	ociates 24	<u>4</u>)	Space:	None						~
Remark	cs Email Log (0)	Suppo	rting Do	cuments (1)	Related Iter	ms (0)	Chang	e Log				
		Change Ver	rsion	Set Order	Views 🔻	Add Files	▼ S	hare with	External	•	Remove	a
	Name		Shared	Туре	Size	6	Pre 🗹	Yes	ated Ite	ms (2)		
	M201.pdf	Y	es	PDF File	913	KB 3/		No				
٢						>		0	φ	<u> </u>	Q	•
Keywor	rds:											
Ą	,							ОК	Cano	el	Hel	p

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.

 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.

🜲 Identify Action Ite	m		– 🗆 X
Subject:	Action Item for: 00002 - ladder not extended		
Type:	Action Item ~	Action Item ID:	Auto Number
Status:	Not Started ~	Priority:	Normal
Percent Complete:	0 🔹	Disciplines:	
Assigned:	No Date	Assigned To:	
Due Date:	✓ Tuesday , April 21, 202(∨ 5 ∨	CC:	
	Remind 2 days before due	Assigned By:	
Action Completed:	No Date]	
Description	Discussion Email Log (0) Supportir	ng Documents (1)	Related Items (1) Change Log
		Relat	e to Share with External Remove
Subject	Type Workflow	Team Memb	
☑ ladder not exter	Tield Note	Toward Roark	〒 〒 :01 <hroark01@jma-dt01.c< td=""> 8/1/2013 </hroark01@jma-dt01.c<>
<			>
Keywords:			
♦	Next Action Send ch	ange notification er	mail V Create Cancel Help

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, click **Add From Field Notes**.
- Sort or filter to find the field note(s) you want, select them, then click **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).

Observations	General	Supporting Docur	ments (0) Email Log (0) Related Items (0)	Change Log	
				Add fro	m Field Notes	Create Action Item
Item Number	å Choose Fie	ld Note				- 🗆 ×
	Select Iten	1 <u> </u>				
	🔏 🛛 All F	ield Notes (30)	~	Filter All Columns		×ø
	ID 🔺	Created	Author	Subject	Space	Last Modified ^
		- T	7 7		T	T
	00001	7/3/2013	Howard Roark 01 <hroar< th=""><th>Broken pipe</th><th></th><th>12/11/2013 11</th></hroar<>	Broken pipe		12/11/2013 11
	00002	5/4/2013	Howard Roark 01 <hroar< th=""><th>ladder not extended</th><th></th><th>12/11/2013 11</th></hroar<>	ladder not extended		12/11/2013 11
	00003	6/4/2013	Howard Roark 01 <hroar< th=""><th>Aerial lift - basket</th><th></th><th>12/11/2013 11</th></hroar<>	Aerial lift - basket		12/11/2013 11
	00004	7/4/2013	Howard Roark 01 < hroar	hunter elec get training sign-i	n	12/11/2013 11
<	00005	7/4/2013	Adam Klose 01 <aklose0< th=""><th>Sitework sub get more peop</th><th>ole</th><th>12/11/2013 11</th></aklose0<>	Sitework sub get more peop	ole	12/11/2013 11
Keywords:	00006	6/4/2013	Adam Klose 01 <aklose0< th=""><th>Hardscape PCO for pkg lot?</th><th></th><th>12/11/2013 11</th></aklose0<>	Hardscape PCO for pkg lot?		12/11/2013 11
A	00007	6/4/2013	Adam Klose 01 <aklose0< th=""><th>Discussion with bob</th><th></th><th>12/11/2013 11</th></aklose0<>	Discussion with bob		12/11/2013 11
	00008	5/10/2013	Howard Roark 01 < hroar	Fix door		12/11/2013 11

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.

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

JEFFERSON MILL A		1999009.24 - Alpengrov	ve Science (Center 2	24		
MY PROJECTS	DIRECTORY	 PROJECT HOM 	e send	• 👻	VIEW	▼ HELP ▼	
					Files a	nd Documents	Field Management
Shortcuts				Gall	⇆	File Transfers	Field Notes
Send		View		No	(Shared Folders	Daily Reports
Files		与 File Transfe	ers	5 Da		Document Sets	Site Visits

 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.

Field Note		Sield Notes	<table-cell> Modify</table-cell>	🛞 D	elete	🗣 Add Similar	🖶 View Form
Subject:	Doors installed		ID:	00030			
Space:	关 101 - Elevator I	Lobby	Author: Adam K 24)		Close 24 (Jefferson Mill Associates		
Created:	3/2/2020			,			
Keywords:							
REMARKS	EMAIL LOG SU	JPPORTING DOCUMENTS	RELATED ITEMS	5 CHA	NGE LOG		
Name					Туре		т
🗟 annotat	ion-Adam Klose-03-02-2	20 11.16.11.jpeg 🛛 🕹			Image		
Total items:	1					Show row	/s: 25 🔻

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 **Share with External** from the field note's **Supporting Documents** tab in Project Center.