





Your Guide for Digital Field Work Success

Learning from our clients' experiences, we created this guide as a roadmap to success when working in the field on a digital device instead of paper. These best practices help straighten out the learning curve, so you can avoid common mistakes during transition. Tips marked with the Wildnote feather  are specific to the Wildnote platform. You can download a convenient companion checklist [here](#).

Before You Go Out in the Field

Optimize Your Devices and Software

Make sure that your devices are fully charged and your operating systems are updated to avoid unnecessary interruptions.  Project Managers: Make sure each mobile device is running the latest version of the Wildnote mobile app.

Test Your Projects and Survey Forms

Before you go into the field on a new project, while you still have an internet connection, give the mobile app a test drive. Walk through all of the projects and survey forms you plan to use. Get familiar with the mobile interface so you know where to tap to activate the functions on each screen.

Consider the flow of the data collection. Just because a certain process works on paper doesn't mean it will be the same on a digital device. Complete each survey form with realistic data, so that you can be sure the questions and answer types suit your needs. For example, a +/- counter may suit your needs better than a number field. Or a drop-down list may work better than a free-form field or checklist.

Run a report on the data to make sure the output is complete, and in the order that you or your clients need.



Check out the documents below in the **Wildnote Help Center** for tips to help you maximize efficiencies that save time and money.



[Set up a project](#)




[Create your own customized survey forms](#)




Sign In and Sync All

Follow these steps and you will be ready to work offline in the field. You can upload your data to the cloud when you regain connectivity.

1. Make sure you *Sign In* to the mobile app *before* going out into the field. You cannot *Sign In* to the app unless you have an internet connection.
2. *Sync All* to retrieve your latest projects and survey forms from the cloud, including any changes made on the web app since the last sync. For best workflow, perform a sync at the beginning of your work day when you have a strong WIFI connection. Syncing can take up to 2 minutes for large amounts of data. Always make sure you are working on the most up-to-date version of your project and survey forms.
3. Choose *Sync All* if you are working on multiple projects throughout the day. If you are only working on one project, you can sync faster by choosing *Sync Project*.

Settings
Map View
Sync Project
Sync Project Documents
Project Documents
Sync All 
Sign Out

Load Project Documents and Maps

 Wildnote also lets you load relevant *Project Documents* right into the mobile app so you can readily access them in the field while offline.

If you're going where the internet is slow, or you can't get online and you need a map, you can save a geographical area from Google Maps (map view only) to your device for offline use. The Google Maps app is included with Android devices and can be downloaded for free to iOS devices. The links below give step-by-step directions on how to download a map and navigate to a location offline.

For Android Devices:

<https://support.google.com/maps/answer/6291838?hl=en&co=GENIE.Platform=Android>

iOS Devices:

<https://support.google.com/maps/answer/6291838?hl=en&co=GENIE.Platform%3DiOS&oco=0>

Once You Are in The Field

Optimize Mobile Device Settings

You can increase battery life and application responsiveness by turning off any apps or functions you don't use in the field. Devices can burn a lot of juice by repeatedly searching for Wi-Fi, cell signals, location, or bluetooth devices, and your data collection app can get sluggish when there are unnecessary applications running in the background.



Saving Your Data to Your Mobile Device

Wildnote lets you save collected data to the local database on your device as you go. If you tap *Save*, your cursor remains in the same location while your data is saved so you can easily continue working. Tapping *Save and Exit* takes you out of the survey and into the options for syncing.

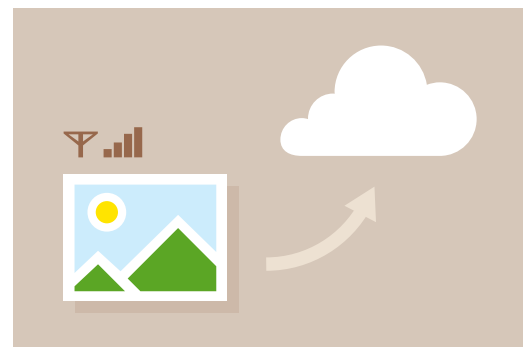
Save early and often. You can always go back to a survey form and edit it. Just tap the survey form on your mobile device to reopen it. Remember, once you sync a survey form to the cloud, it is available for editing via the web app. Edits made via the web app will not appear on your mobile device until you perform a new *Sync All*, or *Sync Project*. Always make sure you are editing the latest version of a survey form to prevent overriding saved data.

*For more detail about Best Practices for syncing, please refer to ***Sync Smart: Workflow for Project Managers***.

Syncing Your Data to the Cloud

Syncing is the action that uploads data to the cloud. Do this as often as you can. Syncing as soon as you can makes uploads smoother because you will transmit less data at once. Even when you've saved data to your device, don't wait until the end of a big project to upload all of the data to the cloud.

If your phone or tablet has a cellular connection, you can sync your data from the field to the cloud immediately after saving. If your device does not have a cellular connection, sync as soon as you are connected to Wi-Fi.



Photos transmit best with a strong connection

If auto-sync is available on your chosen platform, it needs to be turned on. Be aware that if you are in a remote area with poor connectivity, auto-sync will deplete your battery by causing your device to continually search for an active signal. It can also trigger an incomplete data transmission if it tries to sync when the signal is weak or intermittent.



Syncing Your Data with Wildnote

The cloud-based Wildnote platform has two interfaces, the Wildnote Mobile Application (mobile app) and the Wildnote Web Application (web app). The mobile app is used for field-data collection, while the web app, which is accessed online through a browser, is used in the office for administrative purposes, such as project setup, data management, and reporting. When you are out in the field and working offline, the data is temporarily stored on your mobile device. When your mobile device has Wi-Fi or cellular access, you sync your data and photos to the cloud, making them instantly available online for the rest of your team to view, edit, and export.

There are three ways to sync data between the mobile device and the cloud-based web platform:

- *Sync All* is a two-way transmission that sends *all* data from *all* projects from the mobile device to the cloud and vice versa.
- *Sync Project* is a two-way transmission that sends *all* data for a *single* project from the mobile device to the cloud and vice versa.
- Syncing a single survey sends the data in only one direction, from your mobile device to the cloud.

Pro Tip - When connectivity is limited, you can restrict your data use by single syncing only the new and updated surveys. To sync a single survey form, click on the brown arrow-circle next to the completed survey. The arrow-circle turns to a green check mark once the survey form successfully syncs to the cloud.



Bring Backup Batteries and Support Equipment

Batteries

We've all been there — all ready to go and the device dies. Backup batteries and portable chargers are cheap insurance.

Before you buy, take a look at the battery capacity of your device. A typical smartphone has a battery size of between 2,500 and 4,000 mAh. When looking for a portable charger, make sure it has what you need. You probably don't need a 30,000 mAh charger just for yourself if you can re-charge it every evening. You likely only need about 2,000 mAh to get you through the day. Those chargers are much cheaper and lighter than their larger counterparts. However, if you're camping and can't charge your backup every day, or if you're supporting more than one device, you might want to consider the larger capacity.



Chargers

We love our tech tools, and that means we love portable solar chargers! Lifewire recommends these as [The 8 Best Portable Solar Chargers To Buy In 2019](#).

Billed as the “The most durable, rugged, and weatherproof panel in the world,” the [Wildtek Source Charger](#) is the first fully waterproof solar charger on the planet.

Headset

Headsets can be handy. If you are entering lots of text, the dictation microphone can save a lot of keystrokes. Using a headset helps eliminate background noise for more accurate entry. Dictation is difficult in windy environments, so check the specs on microphones before you buy.

Stylus or Gloves

If your fingers are cold, or wet, gloved or dirty, it can be difficult to operate a touch screen. A simple and inexpensive stylus can save a lot of headaches. There are also gloves with conductive fingertips. There is even conductive thread you can buy and sew into your gloves. Make sure the gloves fit snugly against your fingers, so you can type and tap fast and efficiently. Fingerless gloves and gloves with removable index fingertips are also good options.

Anti-glare Screen Protection

Be aware that polarized sunglasses decrease the visibility of most LCD and LED screens. Try yours out in bright sunlight before going to work in the field. In addition to appropriate sunglasses, consider an anti-glare film that can be applied directly to your screen. Sometimes, simple is best. Wearing a wide-brim hat with your back to the sun is an effective shading solution.

Camera Activation

Did you know the volume key can be used as a shutter to take a picture on mobile devices? You can also voice activate most cameras by saying “shoot.” This is a great function when your hands are steadying a device or juggling other gear. The iPhone comes with the volume key activated for the camera. The setting locations for Android devices vary. Look up your device to find out how to set voice commands and/or an alternative shutter touch activation. There may be several options depending on your phone and operating system.

Caring for Your Devices

Dust, dirt, heat, and water come with the territory. Consider your work environment and think about what kind of precautions will best protect your gear. Whether you need a rugged, waterproof case designed for the harshest environments, or simple awareness while in the field, planning ahead is your best guarantee of success.

Heat

Devices can heat up quickly in exposed environments. Never point your screen directly toward the sun and avoid placing your device on the hood of a car or a rock, both of which reflect heat. A wide-brim hat will not only shade you, it can also shade your device and help reduce both glare and overheating. Simply placing a light-colored towel or reflective sheet over your device or keeping it in an insulated case when not in use will also help.



Cold

Just as heat can be damaging to your mobile device, so can extreme cold. As temperatures gets colder, the performance of mobile devices degrade. Optimal charging temp is 10°-30°C (50°-86°F). If you are working in a cold environment, tuck your device into an interior layer of clothing so your body heat will keep it warm. In addition, there are special cold weather cases to protect your device and keep it performing well.



Water & Impacts

Water and electronics will never be friends. Protective cases and gear bags are specially designed to keep your devices dry and running when working in wet environments. Some are also designed to protect your device from impacts. If you are going to a wet environment, it is a good idea to bring a waterproof case or bag for your device. However, check the IP rating of your device first. IP ratings are used to define levels of sealing effectiveness of electrical enclosures against intrusion from foreign bodies and moisture. If your device's rating is IP-68, then you can get away with a lighter case that will ultimately be cooler for your device in hot weather.



 [Let us know if you have any Pro Tips to add to keep our community tuned up for success!](#)