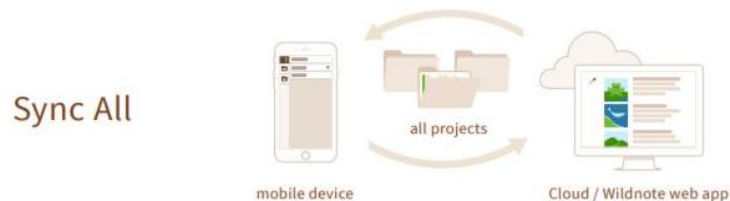# Sync Smart - Workflow For Project Managers

Understanding how the cloud-based Wildnote platform syncs data between the mobile app and the integrated web application can help you establish an editing workflow that goes smoothly. The 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, survey form management, 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 cloud to the mobile device and vice versa. *This is the very first sync you will execute.*
- 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 form sends the data in only one direction, from your mobile device to the cloud.

Once a survey form has been synced from a mobile device to the cloud for the first time, it can be accessed in two places, on the mobile app, and on the web app. When changes are made on either of those interfaces, you have now created two versions that must be synchronized.-- The sync transmits the most recent version to the cloud, updating the older version. The next time you open that survey form *via either interface*, the new version is the one that you will see.

A problem occurs when two people have made changes to the same document in two different places.
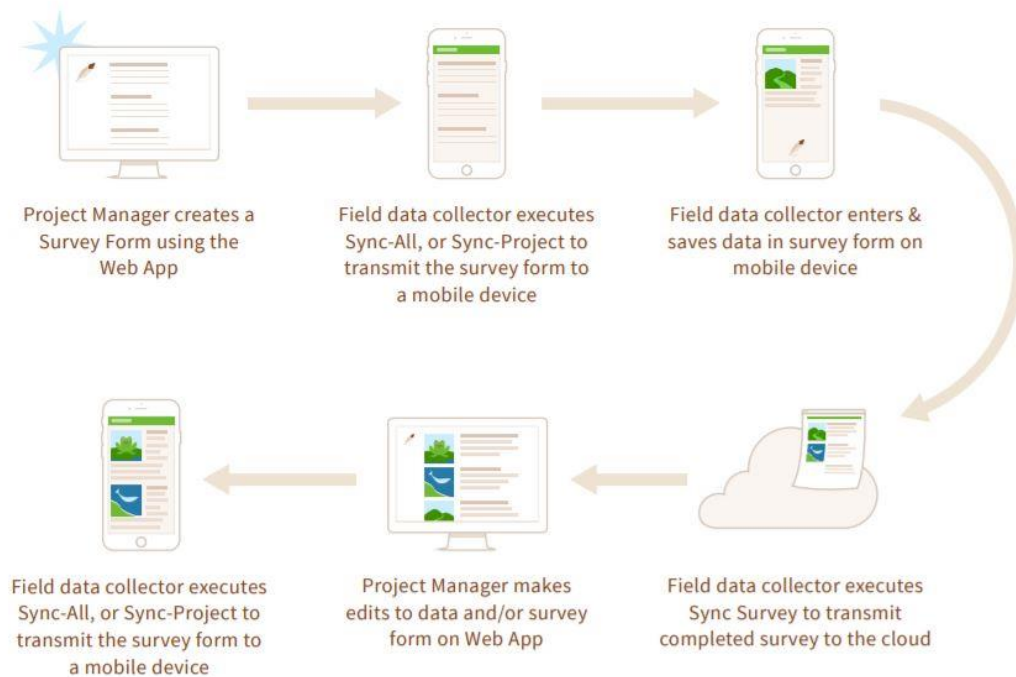
Best practices include waiting until the person in the field is done for the day and has synced their survey forms for the last time, and then editing saved data on the web app.

A Cautionary Tale
When office and field staff edit the same survey on the same day.
We all have days when deadlines force us to speed up processes and cut corners, and that's when errors tend to be made. In the event that the person collecting data in the field and the web app data manager or project manager are both making changes, **THEY MUST BE IN COMMUNICATION AND MAKE SURE THEY ALWAYS PERFORM THEIR EDITS AND SYNCS SEQUENTIALLY**. If a field user is going to make changes to data within a survey form on the mobile app *after* their project manager makes changes, the field user must execute *Project Sync* to pull the project manager's changes back onto their mobile device. Only then can the field user safely make their changes and sync them back to the web application for the project manager to review.

Best Practices Workflow

Project Manager creates a Survey Form using the Web App → Field data collector executes Sync-All, or Sync-Project to transmit the survey form to a mobile device → Field data collector enters & saves data in survey form on mobile device → Field data collector executes Sync Survey to transmit completed survey to the cloud → Project Manager makes edits to data and/or survey form on Web App → Field data collector executes Sync-All, or Sync-Project to transmit the survey form to a mobile device

Quality Assurance and Data Recovery

Ideally, project managers perform daily QA (from the *Review and Edit* page) to assess the accuracy and completeness of synced data and photos. **TIP:** When applicable, reviewing the project locations column can be a helpful way to check for synced data.

At minimum, we recommend weekly QA so that any missing data can be more easily reconstructed. Should you discover missing data, call customer support right away. We track every version of every question and answer and can help you construct the survey form as needed. We have a 2-week window in which we can easily reconstruct missing data, after that, it is still possible, but more difficult.

Syncing and Downloading Photos

Best practices for syncing photos include making sure you have a strong connection for clean, complete, transmissions. You can download project photos or sync them directly to Dropbox from the web app photo gallery. You can select a single photo or choose *Download All Photos*. Downloaded and synced photos also remain in cloud storage until you delete them.