

OMNANT FIELDBOOK

TECHNICIAN'S GUIDE

This guide shows how to use the Omnant Fieldbook app to collect field data even when you don't have an internet connection at the jobsite.

THIS GUIDE COVERS:

- Workflow overview & Quick Start Guide
- Downloading the app
- Logging in
- Capturing field data
- Syncing reports





FIELD TECHNICIAN USER GUIDE —

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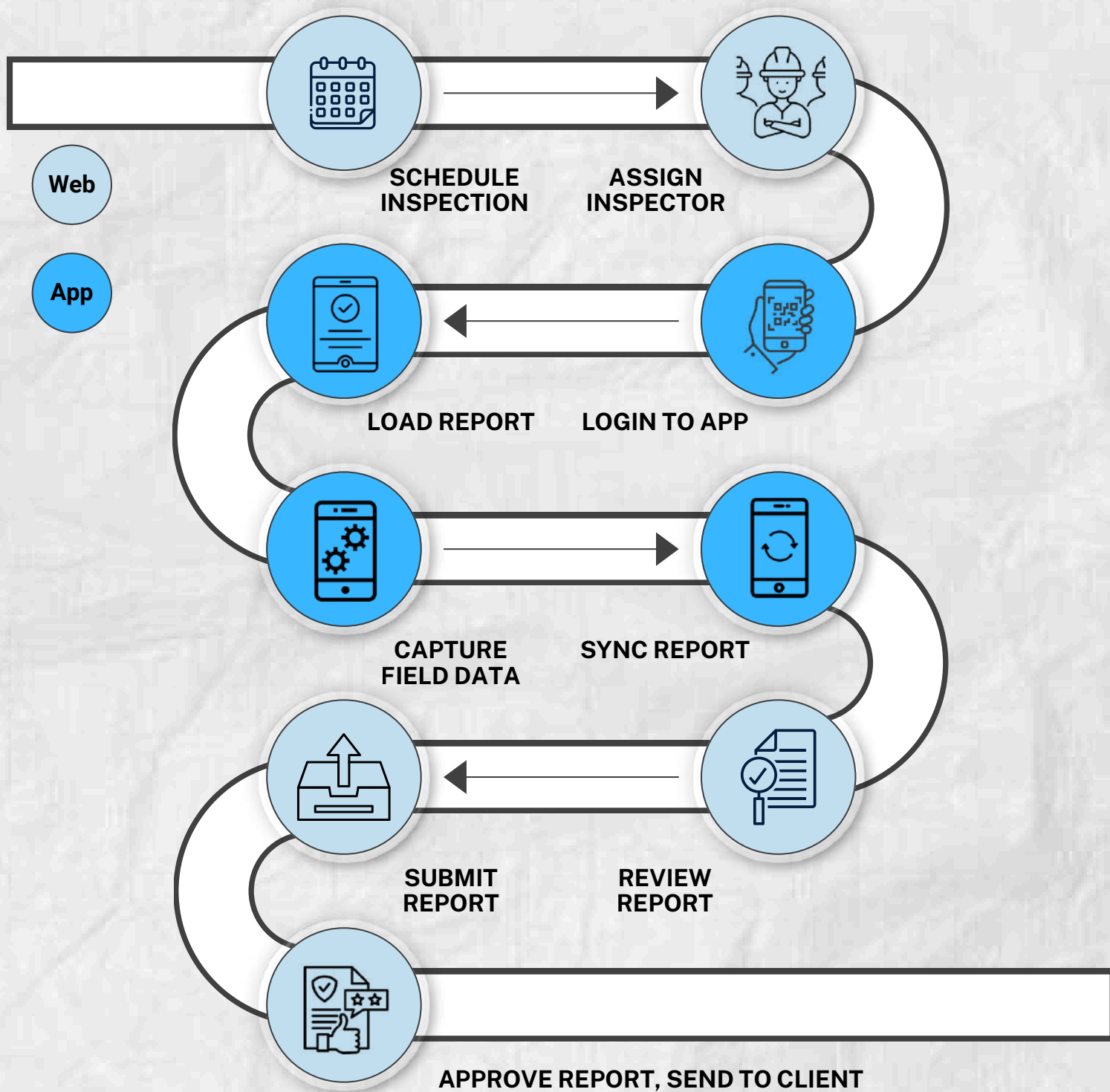
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SYNCING REPORTS



OMNANT FIELDBOOK

WORKFLOW





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QUICK START GUIDE



Before going to the jobsite:

- 01 Review your assigned inspections and note if any are in an area with poor connectivity.
- 02 Login to the app (requires internet), then load your reports.



At the jobsite:

- 03 Tap the report you want to work on.
- 04 Enter your field data.
- 05 Add attachments, images, and documents as needed.



Upon returning to connectivity:

- 06 Tap Unsynced Reports, then sync the report(s) you want to move to the Omnant website.
- 07 Return to Omnant's website on an internet-connected device to review your captured field data and ensure it is validated and correct.
- 08 Submit your report for review and approval as usual.

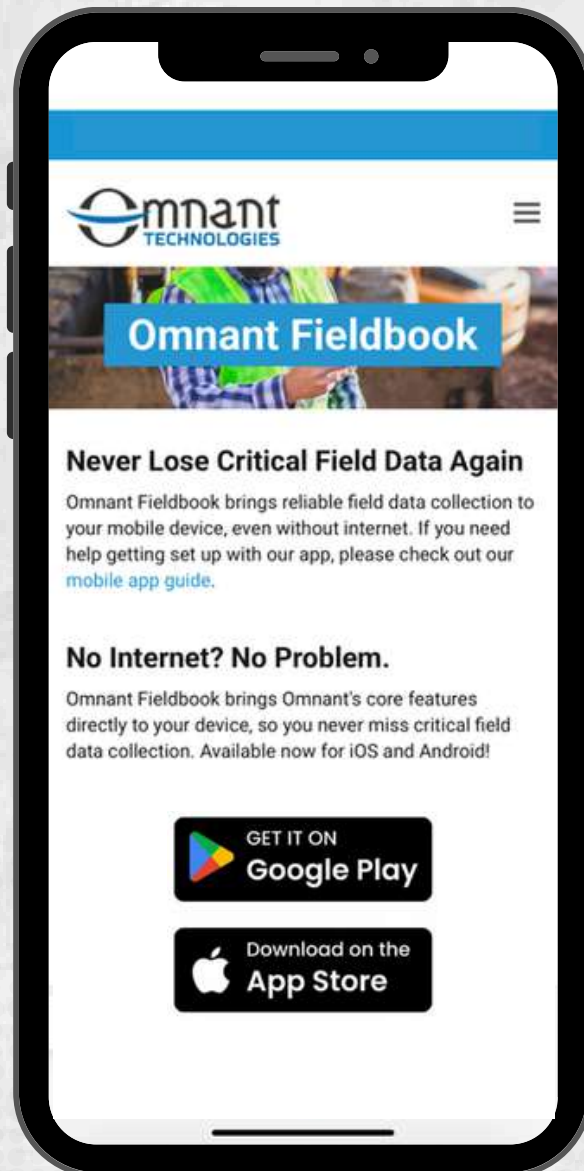


DOWNLOADING THE APP

Omnant Fieldbook is available for iOS and Android.

Visit <https://omnant.com/app> to start your download.

Note: Fieldbook is intentionally not available via search on the Apple App Store.



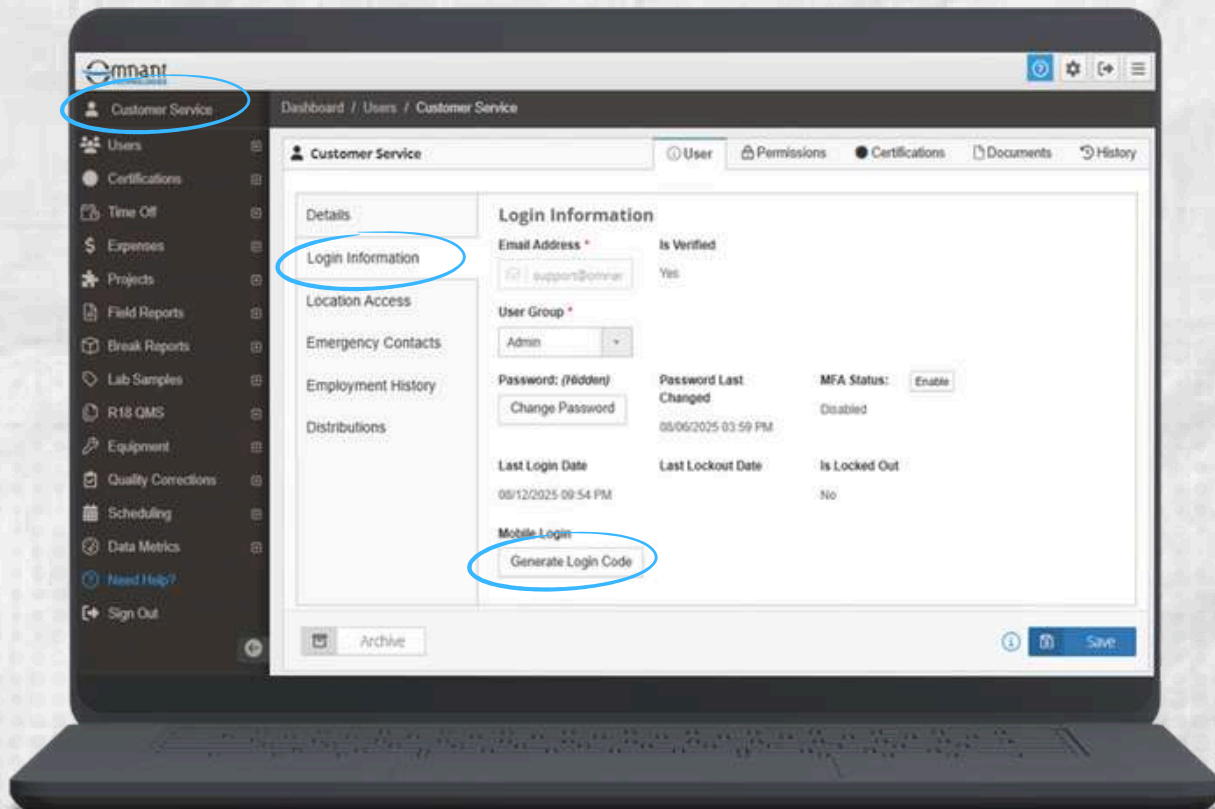


LOGGING IN WITH A QR CODE

Login Option 1: Scan a QR Code

Note: You will need two devices to complete this: one screen to display the QR code, and your phone with the app installed to scan the QR code.

1. Using a computer or device other than your phone, **access your company's Omnant site** (e.g. <https://company.omnant.com/>) **and log in**.
2. **Click your username** in the top left corner.
3. On your user page, click the **Login Information** tab.
4. Click the **'Generate Login Code'** button.
5. A small window will pop up with the QR code.

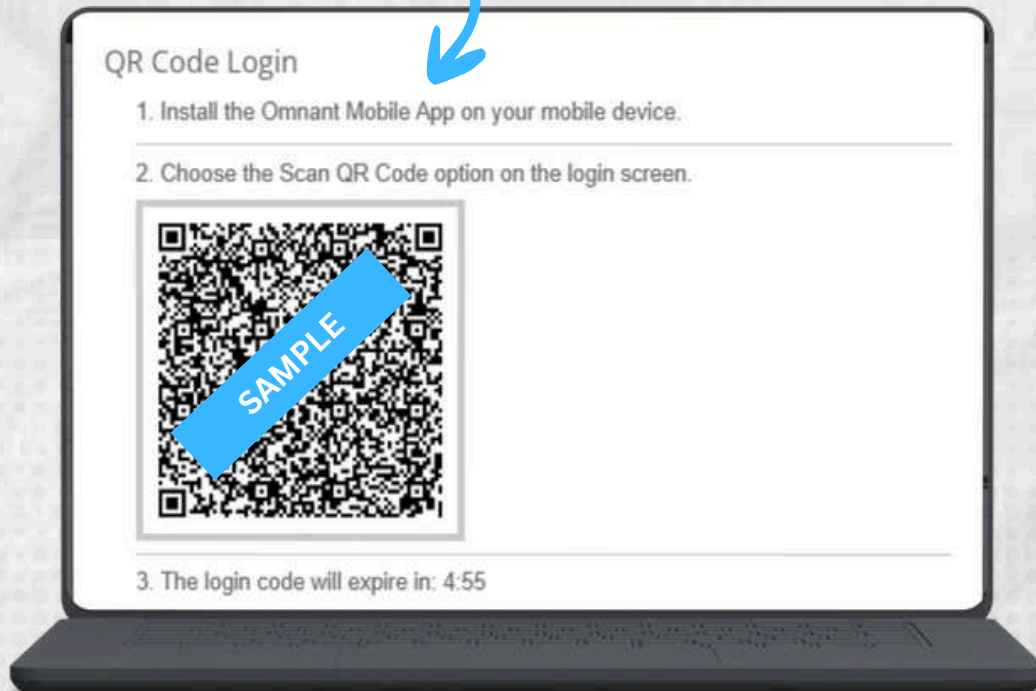
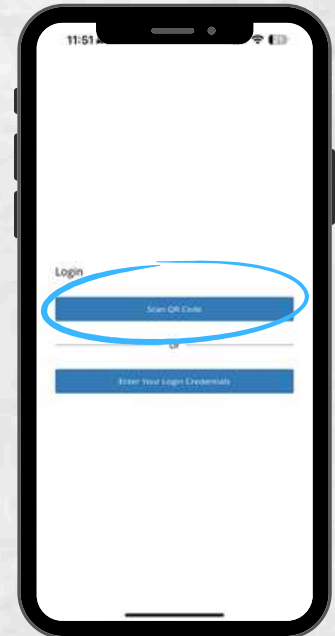


LOGGING IN WITH A QR CODE

Logging in via QR Code (continued)

6. Open the Fieldbook app on your phone.
7. On the sign in page, tap the **Scan QR code** button.

8. **Use your phone camera to scan the QR code** displayed on your other device's screen.

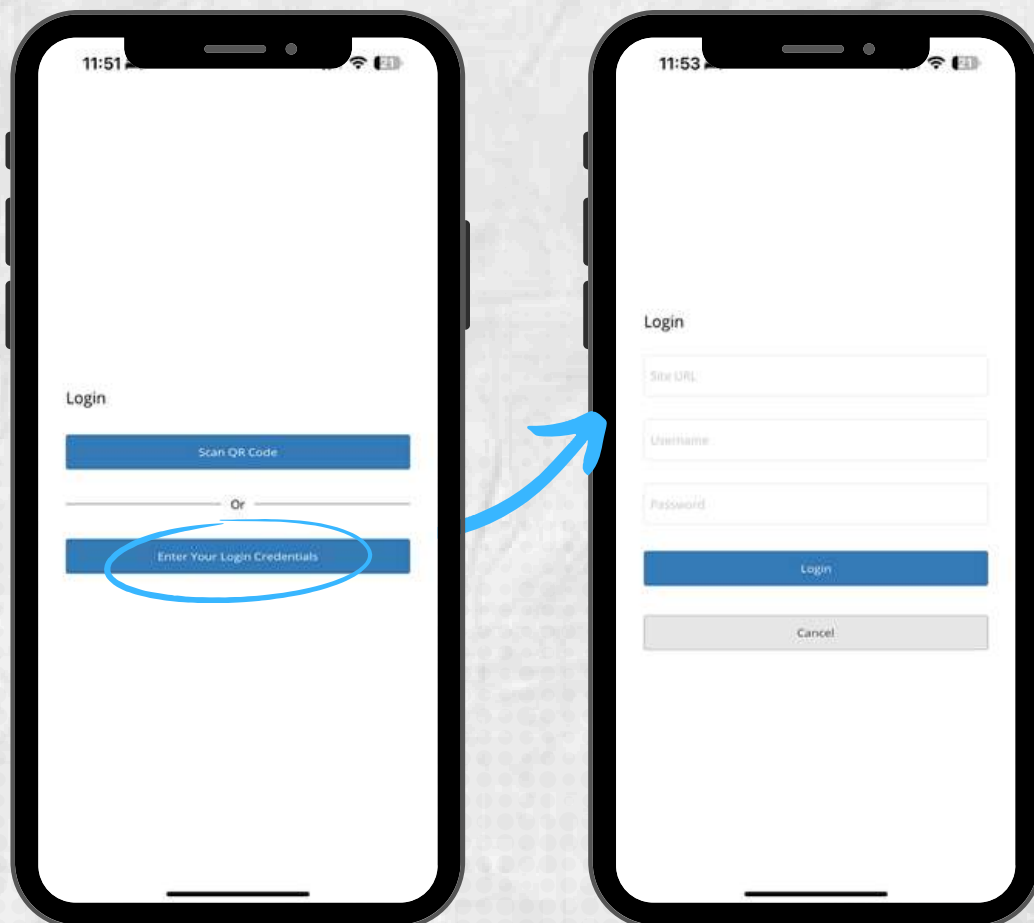


LOGGING IN WITH CREDENTIALS

Option 2: Logging in with credentials

Note: If your company has SSO enabled, then you need to login via QR code.

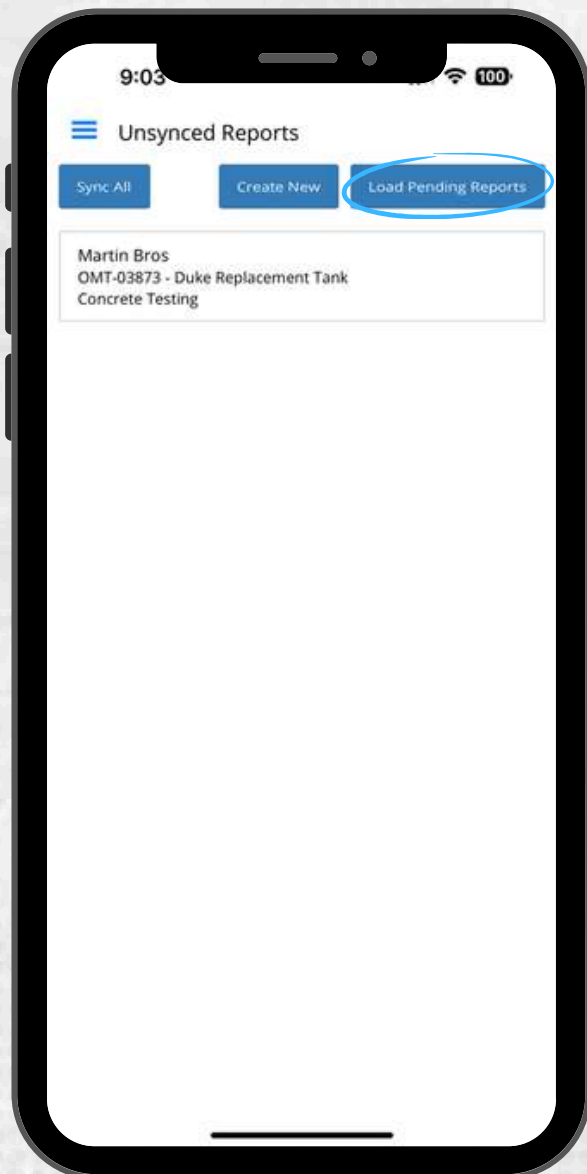
1. Open the Fieldbook app, then tap **Enter Your Login Credentials**.
2. **Enter the URL:** The URL is the same as you would use to log into Omnant on a web browser, e.g. <https://company.omnant.com/>
 - Start the URL with `https://`
 - End the URL with a `/` (for example, `.com/` or `.net/`)
 - Do not include any text in the URL after `.com/` (or `.net/`, etc.)
3. **Enter your username and password.** If you have forgotten your password, access Omnant on a web browser to reset it or contact your admin for help.



ACCESSING YOUR REPORTS

Overview

- Think of Fieldbook like a digital paper and pen while you are on a jobsite where you can capture field data for your report.
 - Capture field data in Omnant on jobs without internet connectivity
 - Save time and the headache of retyping handwritten data
 - Prevent overlooking required data for your reports



Load your Field Report(s).

1. Tap the ≡ icon, then tap **Unsynced Reports**.
2. Tap the **Load Pending Reports** button to display your pending reports.



Your report(s) are now located on your device. Enter field data via Fieldbook.

3. Tap the report you want to work on.

COLLECTING FIELD DATA

On the Unsynced Reports screen, tap the report you want to work on.

Report Details tab

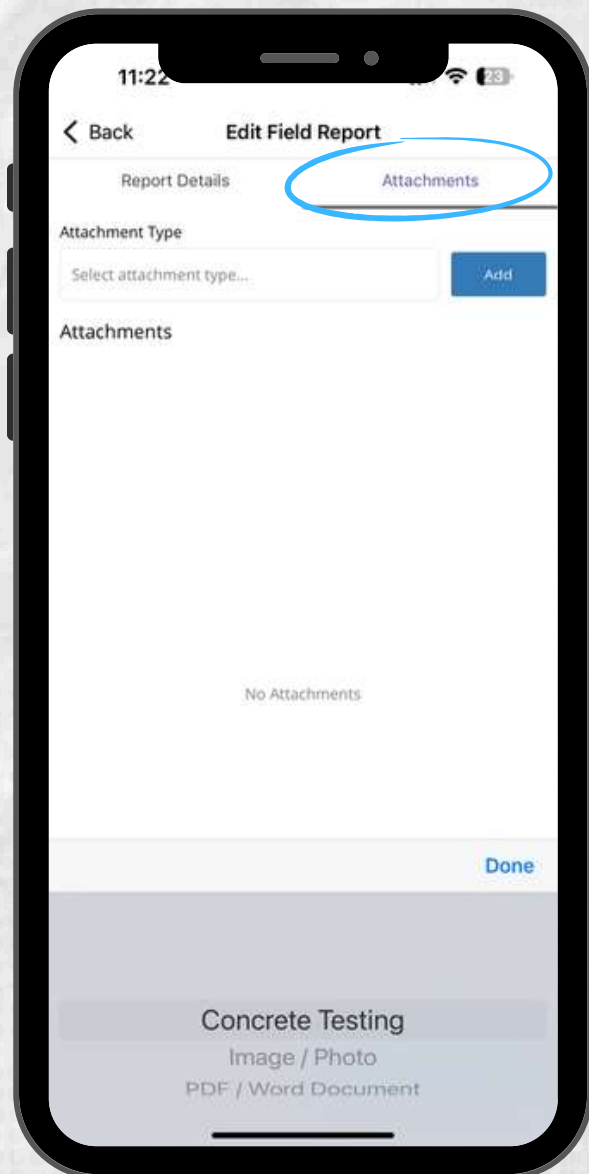
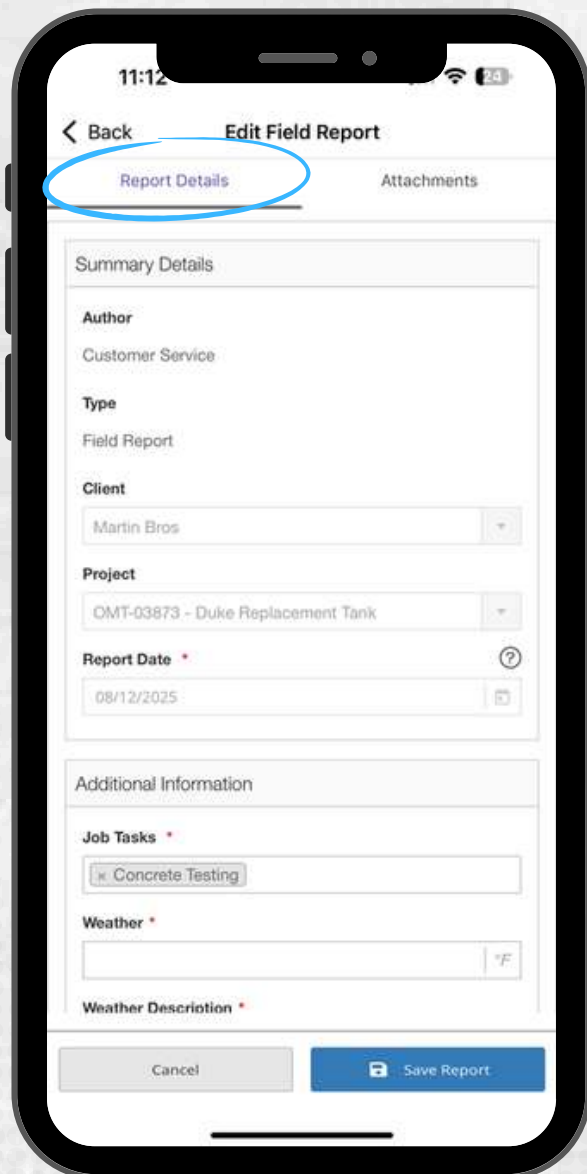
This is the 'cover page' of your report.

1. Complete all sections of the report as required.
2. Tap **Save Report** when done.

Attachments tab

This is where you capture your field data.

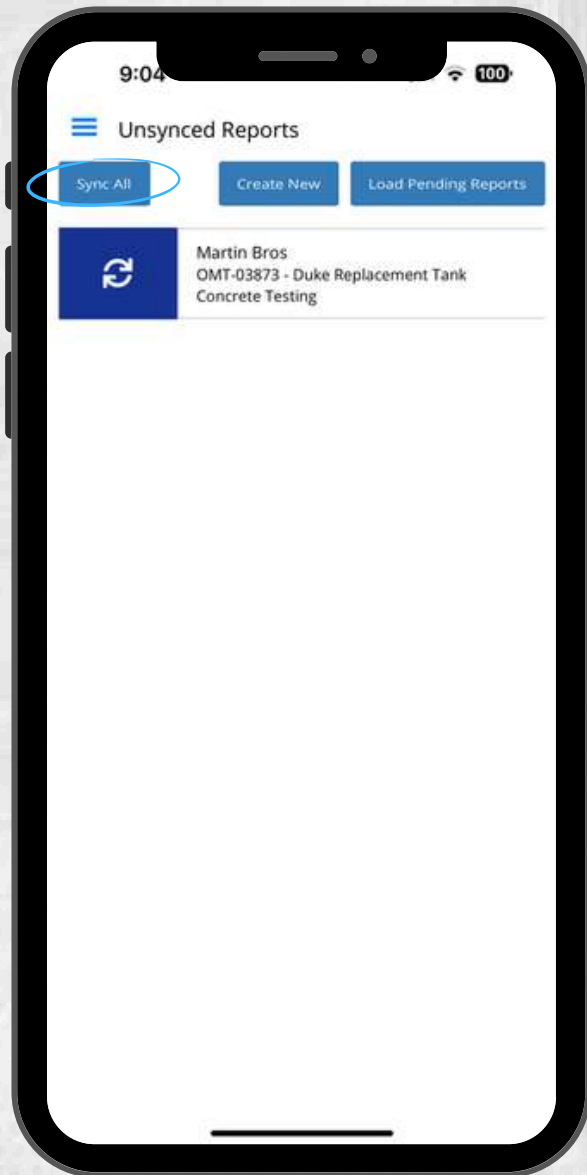
1. Tap **Select Attachment Type...**
2. Choose your attachment, then tap **Add**.
3. Enter field data.
4. Tap **Save Attachment** when done.



SYNCING REPORTS

Overview

When you are done collecting field data in Fieldbook, you will need to move the report from your app back to Omnant. This process is called **syncing**.



Swipe to sync a Field Report

1. On the Unsynced Reports screen, **swipe right** on a report to reveal the blue sync icon.

Note: Swipe left reveals a delete icon.

2. Tap the blue sync icon to sync that individual report.

Sync All

1. Tap the **Sync All** button if you have multiple reports that you would like to sync concurrently.



Syncing moves your field report from the app to the Omnant website.

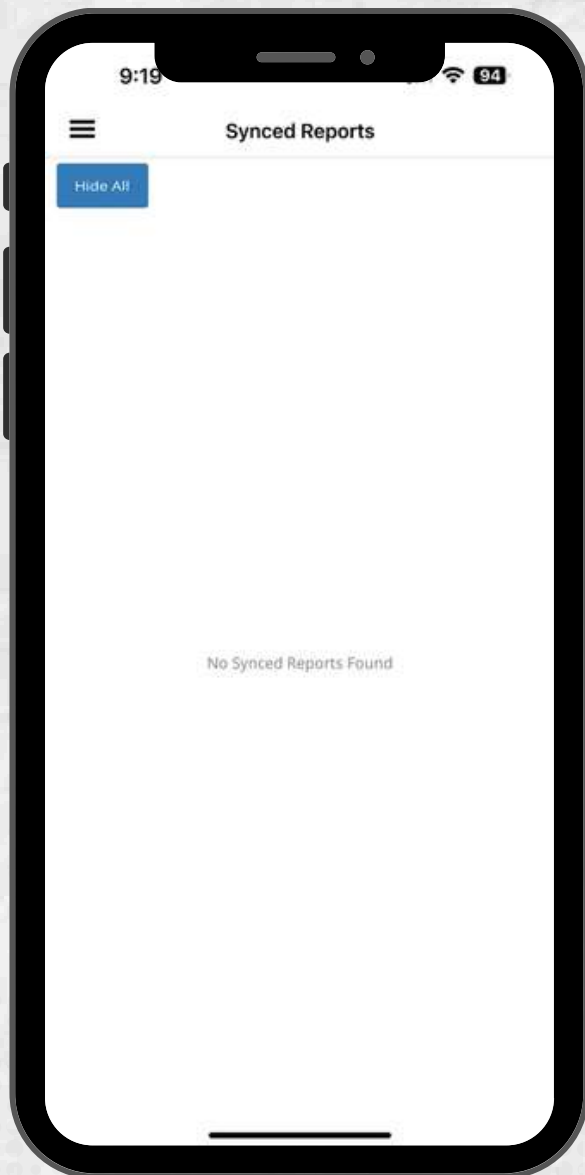
There you can make further edits, review and validate your data, and to submit the report to your manager/client.



SYNCED REPORTS

Overview

You can see the reports that you have synced from the app to the website listed on the Synced Reports screen. Once synced, the report is no longer editable from the app. Use your company's Omnant website (e.g. <https://company.omnant.com/>) to review/validate your field data, and then submit your report.



View Synced Reports

1. Tap the ≡ icon, then tap **Synced Reports**.
2. You can show/hide synced reports on this screen.



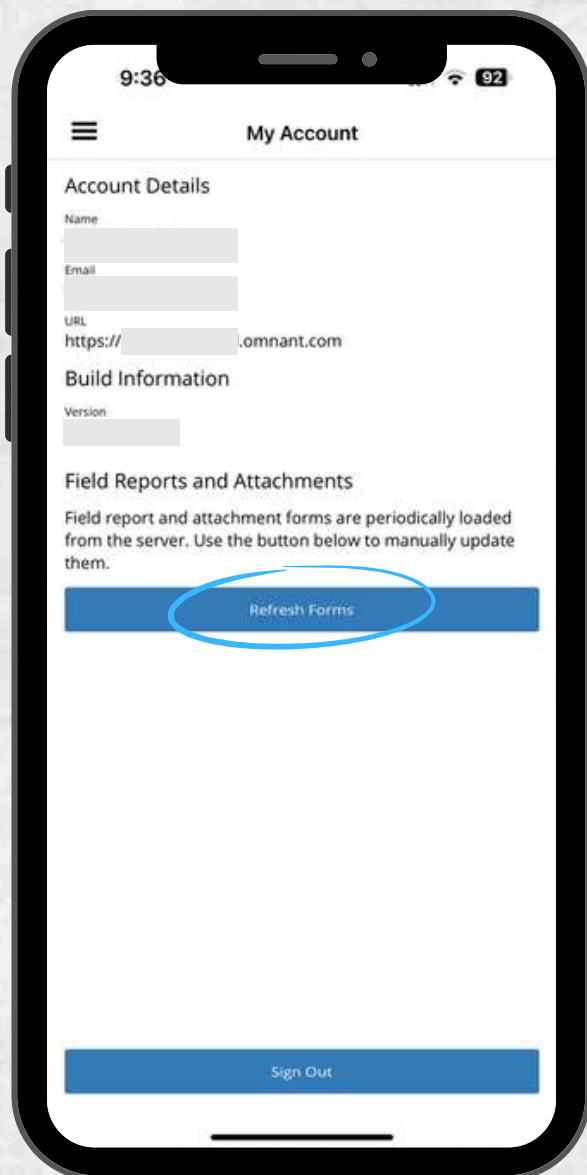
Once synced, reports are returned to the Omnant website. There you can make further edits, review and validate your data, and then submit the report to your manager/client.



REFRESH APP DATA

Overview

The Fieldbook app will check for updates nightly. However from time to time, your company may update report templates. If that is the case, you can refresh the data within the app as needed (*note: internet connectivity required*).



My Account

This page provides a brief overview of your account details and app version.

Refresh App Data

1. Tap the ☰ icon, then tap **My Account**.
2. Tap **Refresh App Data** to refresh the connection between your Fieldbook app and Omnant.



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