

COMPLETE USER GUIDE

How to use FieldWise History Pro

The field app and the Pro Hub online, end to end — signing in, capturing sources, places, people, events, interviews and claims, working with cultural governance, and publishing reports through your organisation's shared workspace.

ORIENTATION

The app and the Pro Hub — how they fit together

FieldWise History Pro has two connected halves. You do all your **capture** in the app on your iPad or iPhone — it works fully offline in the field. Your organisation's **Pro Hub** is the shared online workspace that holds accounts, projects and review, and where finished reports are published. The app syncs to the Hub automatically whenever you have a connection.

The app · iPad & iPhone

Capture sources, places, people, events, interviews and claims. Map sites, record oral history, apply cultural governance, build reports — all offline, syncing when you reconnect.

The Pro Hub · online

Your organisation's shared workspace: accounts and access, clients, projects, sites, work orders and equipment, org-wide review state, published reports and audit — shared across every FieldWise Pro app.

▲ syncs automatically both ways ▼

What's in this guide

1 Getting started

Signing in, your account, organisations and projects.

2 The Pro Hub online

Roles, projects, work orders, and linking the app to the Hub.

3 Dashboard & Projects

Your home screen and switching between research projects.

4 Capturing evidence

Sources, places, the map, people, events and interviews.

5 Research & governance

Claims, collections and cultural protocol controls.

6 Reports, review & sync

Report Builder, exports, approval and offline sync.

Note. You can use the app entirely on its own data if the Hub is ever unreachable — nothing in the capture path waits on a connection. Linking to the Hub adds shared review, publishing and audit on top.

SECTION 1

Getting started

Signing in

History Pro uses the **same account as the rest of the FieldWise Professional suite** — one login across every Pro app your organisation licenses.

- 1 On first launch, enter your work email and password on the **Sign in to Professional Core** screen.
- 2 The app connects your account to your organisation's History Pro workspace automatically.
- 3 If you're the first person at your organisation to sign in, a workspace is created for you automatically.

Important. The app does not create new accounts. If you don't have one yet, someone at your organisation with admin access needs to invite you first — see Section 2.

Organisations and projects

Everything you record lives inside a **project** — a piece of research with its own scope (a local history study, a heritage assessment, an archive survey, and so on). Your organisation can run several projects at once.

- Every source, place, person, event, interview, claim and collection object belongs to **exactly one project**.
- Switching projects (from the **Projects** screen) changes what you see everywhere else in the app.

Tip. Decide which project you're working in before you start capturing — it's the container everything else lands in.

Finding your way around

On iPad the main areas sit in a sidebar; on iPhone they're on the tab bar. The core areas are: **Dashboard** **Projects** **Sources** **Places** **Map** **People** **Events** **Interviews** **Research** **Collections** **Governance** **Reports** **Tasks** .

SECTION 2 · THE PRO HUB ONLINE

Your organisation's shared workspace

The Pro Hub is the online backbone shared by every FieldWise Pro app. History Pro is a specialist app that plugs into it: you capture historical material in the app, and the Hub provides the accounts, project structure and shared review, reporting and audit around it.

Who does what

Role	What they do in the Hub
Administrator	Invites people to the organisation and sets their access; creates clients and projects; oversees the whole workspace.
Project members	Work inside the projects they're added to — capture in the app, review records, build reports.
Reviewers	Approve records or request changes; their decisions are visible org-wide through the Hub.
Clients (external)	See only the reports published to them through the client portal — never your working data. Rolling out

The building blocks

An administrator sets these up once in the Hub; the app then works within them.

Building block	What it is
Organisation	Your whole workspace. Everything belongs to it; membership is by invitation.
Clients	The organisation or party a project is delivered for.
Projects	A scoped piece of work. A History Pro project links to one Hub project (next page).
Sites	Locations a project covers, shared across the Pro suite.
Work orders & field visits	Planned pieces of fieldwork you can tag your captures against.
Equipment	Gear allocated to a project or visit.
Methodologies & templates	Standard methods and field templates an organisation reuses across projects.

Tip. You don't need every building block to start. A project is the only thing you must have — work orders, equipment and methodologies are optional context that make larger jobs easier to manage.

SECTION 2 · THE PRO HUB ONLINE

Linking the app, and what flows to the Hub

Linking a History Pro project to a Hub project

Linking is optional but recommended for team work — it's what makes your review, reports and audit visible across the organisation.

- 1 Open your project's detail screen and choose **Link to Hub Project**.
- 2 Browse your organisation's Hub projects and pick the matching one. The Dashboard hero card then shows the linked Hub project and client.
- 3 To work against planned fieldwork, pick a **work order or field visit** as your capture context when adding sources, places or events.

Note. Unlinked projects work exactly the same for capture — linking only adds the shared Hub surfaces below. You can link or unlink at any time.

What the app sends up to the Hub

When you...	...the Hub receives	Status
Mark a record Ready for review	A shared review request, so a Hub-level reviewer or client-facing lead can see review state across every app in one place.	Available
Approve or request changes	Matching review decisions, and a record lock on approval.	Available
Publish a report	The report and its sections, referencing the generated PDF, so it can be shared beyond a local file.	Available
Capture against a work order	Your activity mirrored into the org-wide audit trail.	Available
Share a report with a client	Exposure through the external client portal.	Rolling out

Important. Cultural governance is enforced before anything leaves the app. A record that isn't approved for export or publication is automatically kept out of Hub reports and the client portal — see Section 5.

History Pro follows an additive, offline-first design: Hub writes are best-effort and queue when you're offline, so a review or capture never blocks on connectivity.

SECTION 3

Dashboard & Projects

The Dashboard — your home screen

The Dashboard gives you a quick overview of the current project and fast ways to start capturing.

- **Stat tiles** — running counts of Sources, Places, People, Events, Interviews and Claims, plus an **In review** tile when records are waiting for approval.
- **Sync banner** — appears when records are waiting to sync to the shared workspace (normal after working offline).
- **Quick capture** — one-tap buttons to start a new Source, Place, Interview, Person or Event without navigating first.
- **Recent activity** — the last things anyone touched in this project, newest first; tap to jump straight there.

Projects

Open **Projects** to see every project your organisation has. Tap one to switch to it — everything else immediately scopes to that project.

- 1 To start new research, tap **Add Project**.
- 2 Give it a name and pick a **project type** — local history, municipal heritage study, oral history, archive survey, cemetery survey, streetscape study, Aboriginal community history, and more.
- 3 Switch projects any time; the current project is always shown on the Dashboard hero card.

Tip. Use a clear, specific project name and type up front — reports and exports inherit that framing, and it keeps a multi-project organisation tidy.

SECTION 4 · CAPTURING EVIDENCE

Sources — your evidence

A **Source** is any piece of evidence: a document, photograph, newspaper clipping, map, oral account, physical object, or record of a building or landscape.

Adding a single source

From **Sources**, tap **+** → **Add Source** and fill in:

- **Title, type and category** — including whether it's a primary or secondary source.
- **Repository details** — where it's held (repository name, box/folder, item reference), so you never lose track of where evidence came from.
- A **photo** of the source, if you have one.

Sequential Capture — for archive visits

Working through a box or folder with many pages in one sitting? Use **Sequential Capture** (same **+** menu). Enter the item's details once, then keep tapping **Add Page** — every photo becomes an ordered page ("Page 1", "Page 2"...) under one source record. Each page can be retaken or deleted before you save.

Citations and linking

- Fill in the **Repository** and citation fields (creator, date, publisher...). A source with all citation fields complete shows a **green checkmark** in the list, so you can see at a glance what's ready to cite.
- Use the **Links** section to connect a source to the places, people and events it relates to — this powers the "Linked Records" sections elsewhere and lets a source be pulled into a claim's evidence.

Tip. Fill in citations **as you go** and link **at capture time** — it saves re-entering the same information later, and relationships then show up automatically across the app.

SECTION 4 · CAPTURING EVIDENCE

Places & the map

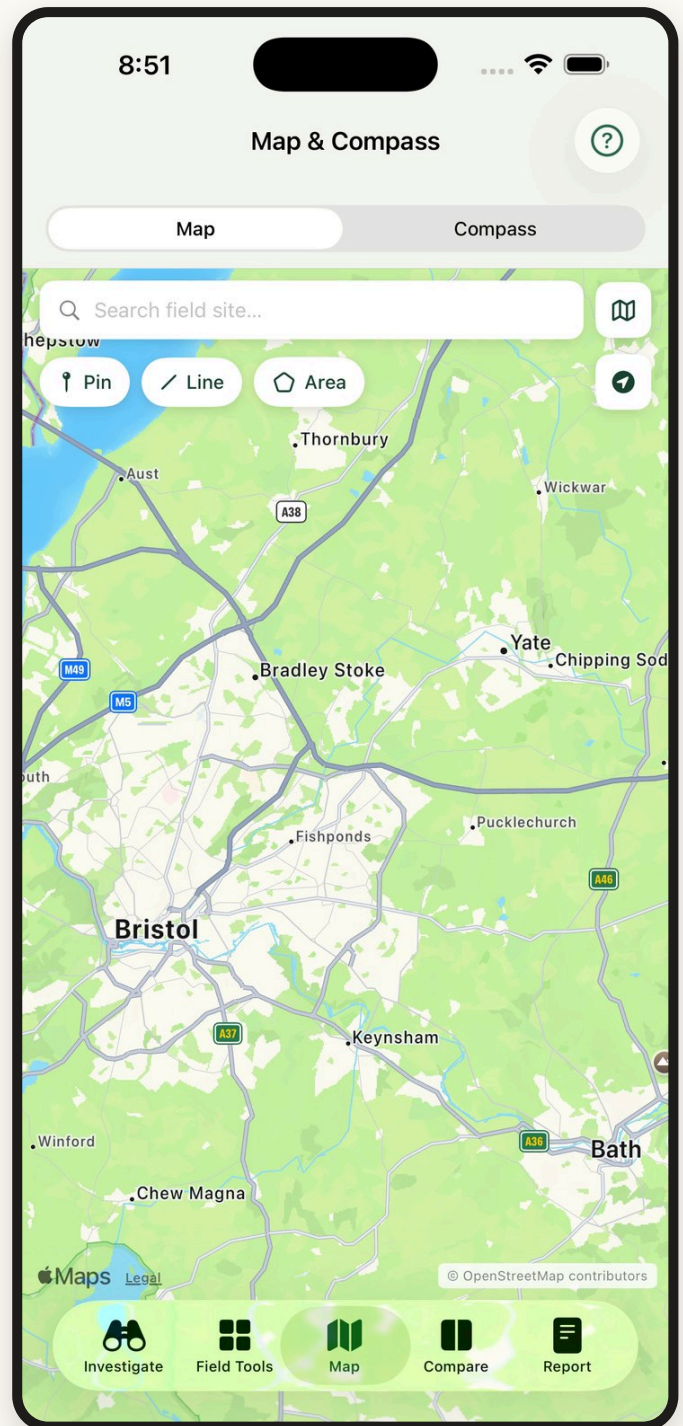
A **Place** is a site, building, monument, landscape, cemetery, streetscape or other historically significant location.

Adding a place

From **Places**, tap **+** and add a name, feature type, and optionally a coordinate — or add one directly from the map by tapping where it is.

The Map screen

- **Map style** — switch between Standard, Hybrid and Satellite basemaps.
- **Historical Overlay** — toggle a topographic contour layer, useful for terrain around historical sites.
- **+ then tap** — drop a pin and create a new place at that exact location.
- Tap any pin for a summary card, then **Open** to jump to the full record.



The shared FieldWise map canvas — search a site, drop pins, draw lines and areas, switch basemaps, all offline. (Shown in a FieldWise reference build.)

Restricted locations

If a place carries cultural-protocol governance with a location display mode other than **Exact**, the map — and every export — automatically shows a generalised coordinate, no position at all, or leaves the place off entirely, depending on the governance settings. This is consistent everywhere the location could appear.

Important. You never have to remember to hide a sensitive location manually — the governance setting on the record does it everywhere at once. See Section 5.

SECTION 4 · CAPTURING EVIDENCE

People, events & oral history

People

A **Person** record captures a biographical or organisational actor. Add one from **People** with a name and an **identity certainty** — Confirmed, Probable, Uncertain or Disputed — since historical identification isn't always definite. Open a record to add alternative names, birth/death dates, and a deceased flag (relevant to cultural-protocol warnings). **Linked Records** shows every source and event already connected.

Events

An **Event** is a dated occurrence or period. Add one from **Events** with a title, a **free-text date** ("c. 1850" or "1880s" work fine), and a certainty level.

Note. Community Narrative. Open an event and use **Add Interpretation** to record more than one account of the same event side by side — useful when sources, historians or communities describe it differently. Each can be marked **Community approved**. Interpretations never overwrite each other; they sit as parallel cards, so no single account is silently treated as the only truth.

Oral history interviews

Important. Interviews are **consent-first**: you cannot start recording until consent is granted.

- 1 From **Interviews**, start a new one and record the participant's name, preferred attribution, interviewer name(s) and date.
- 2 Set **Consent status** to **Granted** once you have it — recording stays locked until you do.
- 3 Tap **Start Recording**; a live timer runs. Tap **Stop Recording** to save the audio as the permanent original (never edited or overwritten).
- 4 Open **Transcript Review** to work segment by segment.

For each transcript segment you can mark it **Restricted** (with a reason), **Approved as excerpt** (only excerpt-approved, non-restricted segments are ever pulled into a report), and **Approved by participant** once they've reviewed their own words.

SECTION 5 · RESEARCH & GOVERNANCE

Claims, evidence & collections

Research — building and testing arguments

The **Research** screen is where you build historical arguments.

- 1 Create a **Claim** — a proposition or conclusion your research supports.
- 2 Use **Add Evidence** to link sources to it as **Supporting**, **Contradicting** or **Contextual** evidence, with notes on each link.
- 3 Leave review comments on the claim as your research develops — kept as a running thread on the record.

A claim's evidence links are what an **Evidence Pack** pulls together into a citation-ready document (see Section 6).

Tip. Record contradicting and contextual evidence, not just supporting — a claim that shows the counter-evidence is far more defensible in a report.

Collections

For organisations holding physical objects (museums, historical societies), **Collections** provides lightweight accession records:

- Accession number, object name and type, materials, dimensions, donor, date acquired and condition.
- Use **Add Provenance** or **Add Exhibition** to build up an object's history over time.

SECTION 5 · RESEARCH & GOVERNANCE

Cultural protocol & governance

This is one of the most important parts of the app. It's worth understanding even if you never work with Aboriginal cultural material directly — the same system handles any sensitive or restricted record.

Turning on governance for a record

Open any record (Source, Place, Person, Event, Interview, Claim or Collection object), scroll to **Cultural Protocol**, and toggle **Cultural governance applies** on. You can then set:

Setting	Options
Record category	Public Aboriginal history · Community-controlled history · Restricted cultural knowledge · Statutory heritage data
Access level	From Public through to Elder-authorised, Embargoed or Closed
Location display	Exact · Generalised · Offset · Region only · Hidden
Approvals	Separate, independent approvals for viewing, reproducing, publishing and exporting
Review status & flags	Where the record sits in review, plus a deceased-person warning flag where relevant

What this actually enforces

Because view / reproduce / publish / export are **independent**, a record can be visible to your project team but still blocked from ever appearing in an exported report. Once a record's **export approval isn't granted, it is automatically excluded** from every export and report — CSV, GeoJSON, KML, citations, evidence packs and the Report Builder — without you needing to remember. Every export tells you how many records were left out for this reason.

Note. The Governance screen. Open **Governance** to see every culturally-governed record in the project in one place, with its access level and review status, and a flag on anything still awaiting review — the place to check the overall state of sensitive material before you report.

Important. Check the Governance screen **before** generating a report. Anything still awaiting review shows there first, rather than becoming a surprise in an export's exclusion count.

SECTION 6 · REPORTS, REVIEW & SYNC

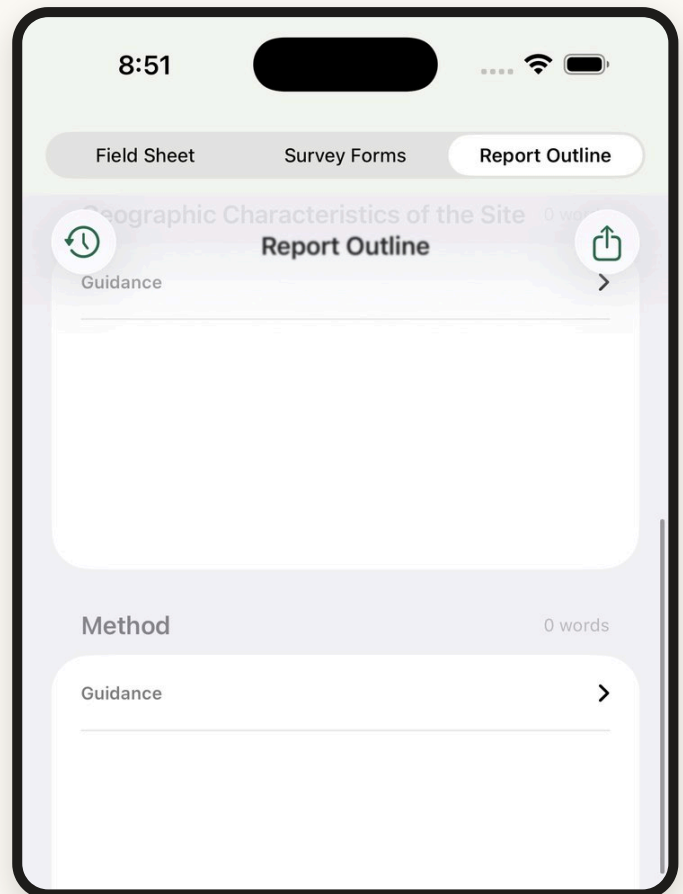
Reports & data exports

Report Builder

- 1 Open **Reports** and pick one of **twelve templates** (historical research report, place history, archive visit register, and more).
- 2 Give the report a title, then add one or more **sections** — each with a title, free-text body, and the sources and claims it cites.
- 3 Tap **Generate PDF** for the finished document, ready to share — or **Publish to Hub** on a linked project to share it through your organisation's workspace.

Evidence packs

From a claim in **Research**, tap **Generate Evidence Pack** for a one-tap PDF built from that single claim's linked evidence — a lighter alternative to a full report.



Structured, section-based reporting that cites your captured sources and claims. (Shown in a FieldWise reference build.)

Data exports

Format	What it exports	Use it for
CSV	Sources, Places, People, Events, Claims, Collections	Spreadsheets
JSON	The same six record types, structured	Other tools / dev
GeoJSON / KML	Places as geographic data	GIS software / Google Earth
RIS / BibTeX / CSL JSON	Source citations	Zotero, EndNote & similar

Important. Every export and Hub publication respects cultural protocol automatically — records without export (or publish) approval are left out, and the count is shown.

SECTION 6 · REPORTS, REVIEW & SYNC

Review, approval & offline sync

Tasks — review and approval

Tasks shows every record across the current project sitting at **Ready for review**, in one queue.

- Swipe a record to **Approve** it, or to request **Changes**.
- Requesting changes prompts for a comment explaining what needs fixing — recorded against the record along with who reviewed it and when.
- On a Hub-linked project, these decisions also become visible org-wide through the Pro Hub (Section 2).

Sync and offline work

History Pro is **offline-first** — capture sources, add places, record interviews and do everything else with no network connection. Once you're back online, everything syncs automatically.

- Check **sync status** any time from the small icon at the top of the sidebar, or the pending-records banner on the Dashboard.
- Working with no signal for a long stretch is fine — nothing is lost; it waits until you reconnect.

Tip. After a big archive or field day offline, open the app somewhere with a connection before you finish up — a couple of minutes lets everything sync to the Hub and become visible to your team.

Note. Hub writes (review, publish, audit) are best-effort and queue when offline, so they never block your capture or review work in the field.

BEST PRACTICE

A recommended end-to-end workflow

A dependable order of work for a typical project, pulling the pieces together:

1 Set up in the Hub

An admin creates the project (and client, sites and any work orders) in the Pro Hub, and invites the team.

2 Create & link the project in the app

Add the project, choose its type, and link it to the Hub project so review and reports are shared.

3 Capture in the field, offline

Add sources (use Sequential Capture in archives), places, people, events and interviews — filling citations and linking records as you go.

4 Apply governance immediately

Turn on cultural protocol on any sensitive record at capture time, and set its location display and approvals.

5 Build claims

In Research, create claims and attach supporting, contradicting and contextual evidence.

6 Review & approve

Work the Tasks queue; approve records or request changes. Check the Governance screen for anything still pending.

7 Report & publish

Build the report from templates, generate the PDF, and publish to the Hub (or export data/citations) — governance is enforced automatically.

8 Sync

Reconnect to let everything sync to the Hub and become visible across your organisation.

Tip. The two habits that save the most time later: **fill citations as you capture**, and **link records at capture time**. Both make reports and evidence packs almost assemble themselves.

REFERENCE

Troubleshooting & glossary

Quick troubleshooting

If...	Then...
You can't sign in	Confirm your organisation admin has invited you — the app can't create accounts. Check email/password and your connection.
You can't start an interview recording	Consent must be Granted first — set Consent status on the interview, then Start Recording.
A place won't show on the map / in an export	It likely has a governed location display (Generalised/Hidden) or lacks export approval — check its Cultural Protocol section and the Governance screen.
Records aren't visible to teammates	Check the sync banner/icon and reconnect; confirm the project is linked to the Hub if you expect Hub-side visibility.
A record is missing from a report	It may lack export approval — every export shows how many records were excluded for governance.

Glossary

Term	Meaning
Project	A scoped piece of research; everything you record belongs to one.
Source	A document, photo, object, oral account or other piece of evidence.
Place	A site, building, monument or other location.
Claim	A research proposition or conclusion, linked to supporting evidence.
Cultural protocol	The governance settings controlling who can view, reproduce, publish or export a record.
Evidence pack	A one-claim PDF of its supporting / contradicting / contextual evidence.
Access level	How restricted a governed record is — Public through Closed.
Location display	How (or whether) a governed place's coordinates appear — Exact, Generalised, Offset, Region only, or Hidden.
Pro Hub	Your organisation's shared online workspace, common to every FieldWise Pro app.

Need more help?

Your organisation administrator manages accounts and Hub projects. For product information visit fieldwiseeducation.com.au/professional. FieldWise History Pro is offline-first — when in doubt, keep capturing; it syncs when you reconnect.