

ONLINE WORKSPACE · COMPLETE USER GUIDE

How to use the FieldWise Pro Hub

One professional workspace, from scope to signed-off report. Manage clients, projects, sites, teams, field work, records, review, compliance and reporting online — shared across every FieldWise Pro app.

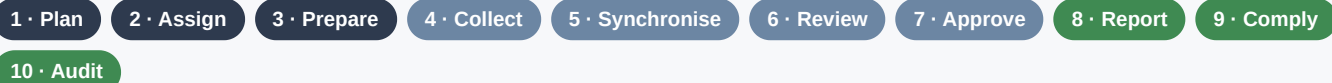
ORIENTATION

What the Pro Hub is & how it's laid out

The **FieldWise Pro Hub** is the online workspace behind the FieldWise Professional suite — one place to run a job from scope to signed-off report. Your field teams capture in the specialist apps (Geography, Heritage, History, Land & Wildlife and the rest); the Pro Hub is where an organisation manages the clients, projects, people, review, compliance and reporting around them.

The operational flow

Every job moves through the same ten stages — the sections of the Hub map onto them:



The workspace at a glance

Dashboard Your live workspace — from field plan to final report.	Clients Client contacts and all their projects together.	Projects The project register — plan and scope work.
Sites Field locations within a project.	Team Members, roles and permissions.	Field planning Work orders, visits, methods and equipment.
Records Shared specialist evidence from the apps.	Samples Sample planning, barcoding and laboratories.	Review & QA Approve, comment or return field work.
Reports Versioned reports and the client portal.	Compliance Permits turned into scheduled obligations.	Safety Risk controls, hazards and visit readiness.
Integrations Costs, time and accounting exports.	Assistance Bounded, policy-governed assisted review.	Settings Organisation identity and governance.

Note. You sign in once and pick your organisation; everything you see is scoped to that organisation. Members only ever see their own organisation's clients, projects and work.

SECTION 1

Getting started & access

Signing in

- 1 Go to **/professional** and sign in with your work email and password (there are forgot- and reset-password links if needed).
- 2 If you belong to more than one organisation, **select the organisation** you want to work in.
- 3 If your membership hasn't been approved yet, you'll land on an **access-pending** screen — an administrator needs to activate you.

Important. Accounts are invitation-based. A new person is invited from the Team section (Section 3); until an administrator activates their membership, they can sign in but see nothing until approved.

Roles & permissions

Every member has a role in the organisation that sets what they can do:

Role	Typically can...
Owner	Everything, including organisation ownership and settings.
Organisation admin	Manage members, clients, projects, sites and governance.
Consultant	Create and run work — projects, records, reports.
Supervisor	Assign and review work; approve or return field records.
Worker	Do assigned work and progress it through permitted statuses.
Viewer	Read-only access to the organisation's work.

Membership status

Members are **Active**, **Suspended** or **Removed**, and a member can be **Protected** so they can't be accidentally removed.

Note. Access is enforced at the database, not just in the screen: a worker can progress only the statuses they're permitted to, and can't change an assignment's identity or requirements.

SECTION 2 · CLIENTS, PROJECTS & SITES

Clients & projects

Clients

The **Clients** directory keeps client contacts and all their related projects together — the top of the structure everything hangs from.

- 1 Open **Clients** → **Add a client**.
- 2 Record the client's details and contacts.
- 3 Open a client to see every project being delivered for them.

Projects

The **Projects** register is where work is planned and scoped. A project ties together the client, the sites, the team, the field work and the reporting.

- 1 Open **Projects** → **Create a project**.
- 2 Give it a name and scope and attach it to a client.
- 3 Open the project to reach its sites, work, records, review and reports.

Tip. Set up the client first, then the project under it — sites, work orders, records and reports all inherit that client/project context, so getting it right up front keeps everything tidy.

Note. A project is also what a specialist app links to. When a field team opens the app against this project, their captured evidence flows back here as shared records (Section 4).

SECTION 2 · CLIENTS, PROJECTS & SITES

Sites & team

Sites

The **Sites** register manages the field locations a project covers. A site belongs to a project, so create the project first.

- 1 Open **Sites** → **Add a site** (you'll be asked to pick its project).
- 2 Record the site's location and details.
- 3 Sites are shared across the suite, so every specialist app working this project sees the same sites.

Team & permissions

The **Team** section is where you invite staff and set what they can do.

- 1 Invite a person by email and assign their **role** (Section 1).
- 2 Activate their membership so they can access the organisation's work.
- 3 Suspend, remove or protect members as your team changes.

Important. Only owners and organisation admins manage membership and roles. Give each person the lowest role that lets them do their job — a Viewer or Worker rather than an admin unless they truly need it.

Tip. Mark key long-term members as Protected so a routine tidy-up can never remove them by accident.

SECTION 3 · RUNNING THE WORK

Field planning

Field planning is where you prepare the reusable resources and assign the actual field work — the **Plan** → **Assign** → **Prepare** stages of the flow.

Work orders & visits

- **Work orders** — a defined piece of work on a project, assigned to a person, with its scope, requirements and status.
- **Field visits** — scheduled visits to a site; the dashboard tracks open work orders and upcoming visits.
- Assign each to a **project, site and specialist app**, and attach a methodology.

Reusable resources

Resource	What it's for
Methodologies	Standard methods (versioned) an organisation reuses across projects.
Field templates	Reusable field forms and structures.
Equipment	Gear that can be allocated to a project or visit.

Tip. Set up your standard methodologies and templates once; every new work order can then reuse them, so field teams work to a consistent, approved method.

Note. A manager creates and administers work orders; the assigned member can then progress only the statuses they're permitted to — they can't change what the work is or who it's assigned to.

SECTION 3 · RUNNING THE WORK

Field records & samples

Field records

The **Records** section holds **shared specialist evidence** — the records captured in the field apps — with **controlled submission and an immutable approval history**. This is the **Collect** → **Synchronise** result: what the apps send up, ready for review.

- Records arrive from the specialist apps against their project and work order.
- Submission is controlled, and once approved the history can't be quietly rewritten.
- You can also create a shared record or draft directly in the Hub.

Samples & laboratories

Samples plans and tracks physical samples and the labs that process them.

- Plan and **barcode** samples, and approve the sampling plan.
- Track status — including **in transit** — as samples move to a laboratory.
- Add laboratories and assign samples to them.

Tip. Approve the sampling plan before the field day so barcodes and chain-of-custody are ready — it saves reconciling samples after the fact.

SECTION 4 · ASSURE & REPORT

Review & QA

Review & QA is the **Review** → **Approve** stage — checking field completeness and quality before anything becomes final or client-facing.

Reviewing a record

For each submitted record a reviewer can:

Decision	Meaning
Approve	Accept the record as final.
Approve with comments	Accept it, with notes attached.
Return for correction	Send it back to the field team to fix.
Request more information	Ask for detail before deciding.

Why it matters

- Review state is shared across every specialist app, so a lead sees QA across the whole organisation in one place.
- Approval history is immutable — who decided what, and when, is retained.
- Only approved records flow into reports and client-facing outputs.

Important. Returning a record for correction records the reason against it. Approve only when a record is genuinely final — approval is what unlocks reporting and, ultimately, the client portal.

SECTION 4 · ASSURE & REPORT

Reports & the client portal

Building reports

The **Reports** section builds **versioned reports** from approved records — the **Report** stage of the flow.

- 1 Create a report, choosing a template and pulling in approved records.
- 2 Move it from **Draft** to **Awaiting approval** and record the review.
- 3 Publish the report — publication is versioned, so each release is tracked.

The client portal

Published reports can be shared with the client through the separate **client portal**, where external client users — who never see your working data — can:

- View the reports published to them.
- Leave comments on a report.
- Formally **accept** a report.

Important. Clients only ever see what you deliberately publish to them. Everything else — draft records, working data, unpublished reports — stays inside your organisation.

Note. Report publication respects the same approval and sensitivity rules as exports: unapproved or sensitive content isn't carried into a client-facing report.

SECTION 5 · COMPLIANCE, SAFETY & FINANCE

Compliance & safety

Compliance

Compliance turns permits and approval clauses into **scheduled obligations** you can track and evidence — the **Comply** stage.

- Register **permits** and see which are active.
- Create **obligations** from approval clauses, and track open ones.
- Submit **evidence** against an obligation to close it out; obligations move to verified.

Safety & assets

Safety & assets manages the risk controls that keep field work safe and compliant.

- Run a **readiness check** on a visit; a visit can be **blocked** until it's ready.
- Report and track **hazards**, including open high risks.
- Manage the risk controls and assets behind a safe field day.

Important. A blocked visit shouldn't proceed until its readiness issues are cleared — the Hub surfaces blocked visits and open high risks on the Safety dashboard so nothing slips through.

SECTION 5 · COMPLIANCE, SAFETY & FINANCE

Finance, assistance & settings

Finance & integrations

Finance & integrations captures approved operational costs and prepares **controlled exports to accounting**.

- Submit **time** and **expenses** against work orders.
- Track what's submitted and approved.
- Configure a connection to your accounting system for controlled export.

Assisted review

Assistance provides **bounded, policy-governed assisted review** — AI help that stays inside rules you set and always ends with a human.

- Create a **policy** that bounds what assistance may do.
- Queue a request; track queued and awaiting-review jobs.
- Every assisted output is **reviewed by a person** before it counts.

Settings & governance

Settings manages the organisation's identity and governance — the organisation profile and the controls that apply across the workspace.

Note. Assisted review never acts on its own: it works within an explicit policy and a person reviews the output — the same accountability that governs records and reports.

THE FLOW END TO END

From scope to signed-off report

How a job moves through the Pro Hub, and which section you use at each stage:

- | | | |
|----|---|---|
| 1 | Plan
Projects · Field planning | Set up the client, project and sites; scope the work. |
| 2 | Assign
Field planning · Team | Create work orders and visits; assign people, apps and methods. |
| 3 | Prepare
Field planning · Samples · Safety | Ready templates, equipment, sampling plans and visit readiness. |
| 4 | Collect
Specialist apps | Field teams capture evidence offline in the apps. |
| 5 | Synchronise
Records | Captured evidence syncs up as shared records against the work. |
| 6 | Review
Review & QA | Check completeness and quality; comment or return for correction. |
| 7 | Approve
Review & QA | Approve final records; approval history is retained. |
| 8 | Report
Reports · Client portal | Build versioned reports and publish to the client. |
| 9 | Comply
Compliance | Track permit obligations and submit evidence to close them. |
| 10 | Audit
Records · Settings | A complete, immutable trail across the whole job. |

Tip. You don't have to use every stage on every job — but the order is the same each time, and the Dashboard follows it, so a job never loses its place from field plan to final report.

REFERENCE

Who can do what

A guide to typical access by role. Exact permissions are enforced by the Hub; when in doubt, an owner or organisation admin can confirm.

Area	Owner	Org admin	Consultant	Supervisor	Worker	Viewer
Organisation settings	✓	✓	—	—	—	—
Invite / manage members	✓	✓	—	—	—	—
Clients & projects	✓	✓	✓	—	—	view
Work orders (create/admin)	✓	✓	✓	✓	—	view
Do assigned field work	✓	✓	✓	✓	✓	—
Review & approve records	✓	✓	✓	✓	—	—
Build & publish reports	✓	✓	✓	✓	—	view
Compliance & safety	✓	✓	✓	✓	view	view
View the organisation's work	✓	✓	✓	✓	✓	✓

✓ typically permitted · view read-only · — not by default

Note. This is a practical guide, not the exact rule set. The Hub enforces permissions at the database (row-level security), and a worker in particular can progress only the statuses they're permitted to on work assigned to them.

Important. Members can only ever see their own organisation's data. Cross-organisation access is denied — signing into the wrong organisation shows that organisation's work only.

FOR ADMINISTRATORS

Setting up your organisation

A first-time setup checklist for an owner or organisation admin:

- ☐ **Complete the organisation profile** — In Settings — identity and governance for the workspace.
- ☐ **Invite your team** — In Team — add people, set the lowest role each needs, and activate them.
- ☐ **Add your clients** — In Clients — contacts and details for who you deliver work for.
- ☐ **Create your first project** — In Projects — scoped and attached to a client.
- ☐ **Add its sites** — In Sites — the field locations the project covers.
- ☐ **Set up standard methodologies & templates** — In Field planning — so every work order reuses an approved method.
- ☐ **Register equipment** — In Field planning — gear you'll allocate to visits.
- ☐ **Register permits & obligations** — In Compliance — turn approval clauses into tracked obligations.
- ☐ **Confirm your specialist apps are entitled** — So field teams can link the apps to this organisation's projects.
- ☐ **Connect accounting (optional)** — In Finance & integrations — for controlled cost export.

Tip. Do this in order — team, clients, projects, sites, methods — and your field crews can start capturing against a fully-prepared project the same day.

REFERENCE

Troubleshooting & glossary

Quick troubleshooting

If...	Then...
You sign in but see nothing	Your membership may be pending — an owner/admin activates it in Team. You may also need to select the right organisation.
You're in the wrong organisation	Use Select organisation to switch; you only see the organisation you're currently in.
A worker can't change a work order	Workers progress permitted statuses only; they can't change assignment identity or requirements — a manager does that.
A record won't go into a report	Only approved records are report-eligible — approve it in Review & QA first.
A visit is blocked	Clear its readiness issues in Safety & assets before it can proceed.
A client can't see a report	It must be published to the client portal; drafts and working data are never visible to clients.

Glossary

Term	Meaning
Organisation	Your whole workspace; everything is scoped to it and membership is by invitation.
Work order	A defined, assignable piece of work on a project, with scope, requirements and status.
Field visit	A scheduled visit to a site, with a readiness check.
Shared record	Specialist-app evidence submitted to the Hub with an immutable approval history.
Obligation	A permit or approval clause turned into a scheduled, evidenced task.
Client portal	The external space where clients view, comment on and accept published reports.
Assisted review	Bounded, policy-governed AI help, always finalised by a human.
Role	Owner, organisation admin, consultant, supervisor, worker or viewer — sets what a member can do.

One workspace, scope to signed-off report

The Pro Hub ties the FieldWise Pro apps together — plan and assign in the Hub, capture in the apps, then review, report and comply back in the Hub. Sign in at fieldwiseeducation.com.au/professional.