



STRABOFIELD

Choosing a Workflow



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1 Choosing a Multi-User Workflow

Use this guide to choose a StraboField setup for a class, field camp, or research team. The best setup depends on two questions:

1. Should participants be able to see one another's data?
2. Should everyone work in one shared project, or should each person's work remain separate?

The workflows below are based on notes from the Canyon City workshop, July 6–9, 2026. Some details, especially permissions for the beta group workflow, should be tested in the current version of StraboField before relying on them.

1.1 Quick Comparison

Setup	Best suited to	Can participants see each other's data?	Main consideration
One account, separate projects	Independent assignments or field areas	Not together in one map; other projects may be downloadable by users of the account	Simple account administration, but projects remain separate.
One account, one project, separate datasets	Class "jigsaw" activities or teams combining field data	Yes, when uploaded data are available in the shared project	Easy to combine contributions, but participants may access one another's datasets.
Separate accounts, project distributed as a ZIP	Independent assignments where participants should not browse one another's work	Generally no, unless a project file or credentials are shared	Better separation, but more account and file administration.
Collaborative Group Workflows (beta)	Research teams contributing to a shared project	Intended for collaboration; test current permissions	Convenient collaboration, but confirm sharing and ownership behavior.

Table 1. Overview of multi-user StraboField workflows.

1.2 One Account with a Separate Project for Each Participant

Choose this workflow when each participant needs an independent project, such as when students map different areas or collect different kinds of observations, and you do not need to view all contributions together during fieldwork.

Setup

1. The instructor or project lead signs in to a StraboField account. This can be an existing account or an account created for the project.
2. Create a clearly named project for each participant or group.
3. Add any shared starting materials, such as basemaps, templates, geologic units, or starter spots.
4. On each device, download the project assigned to that participant. Tell each person which project to use.
5. Have participants upload their projects when they need to back up or submit their work.

Advantages

- Each participant's work is kept in a separate project, reducing the chance that one participant's upload will overwrite another's project.
- One account is simpler to administer than many accounts.

Limitations and cautions

- The data are not combined into one live project or map. The instructor may need to download projects individually and review or assemble them later.
- Users signed in to the same account may be able to download other projects in that account. Separate projects alone should not be treated as a way to prevent participants from accessing one another's work.
- If projects need the same starting materials, plan how to copy or recreate those materials. Do not assume a project can be duplicated automatically.

Example: Field camp. Students map different or adjacent areas. The instructor reviews each student's project separately.

1.3 One Account with One Project and a Dataset per Participant

Choose this workflow when participants should collect separate contributions that can later be viewed together. This is useful for a "jigsaw" activity in which groups cover different areas and then interpret the combined data.

Setup

1. The instructor or project lead signs in and creates one shared project.
2. Add shared project materials, such as geologic units, tags, templates, safety information, and basemaps.
3. Download the same project to each device.

4. Create a separate dataset for each participant or group. Use a clear naming convention, such as a student name, group number, or tablet ID.
5. Participants collect data in their assigned datasets and upload them when connected.
6. The instructor and participants download or view uploaded contributions as needed.

Advantages

- Contributions belong to one project and can be viewed alongside one another once available.
- Shared project materials only need to be set up once.
- This workflow suits activities where the final interpretation depends on combining observations.

Limitations and cautions

- Participants may be able to see or download other datasets in the project. This may not be appropriate for graded work where students need to work independently.
- Test permissions and read-only behavior before the activity. If access is not restricted as intended, a participant could accidentally add or change data in another person's dataset.
- Agree on unique dataset names, and make sure each participant selects the correct dataset before collecting data.
- Test the upload and download process. Do not assume that a dataset created on one device will automatically appear on other devices.

Example: Class jigsaw activity. Groups collect observations in different sections of an area, upload their datasets, and then examine the combined data.

1.4 Separate Accounts with a Project Distributed as a ZIP File

Choose this workflow when participants should work independently and should not be able to browse one another's projects through a shared account.

Setup

1. Create or arrange a separate StraboField account for each participant or device.
2. Build and configure the project on one device, including any shared basemaps, spots, tags, or geologic units.
3. Save or export the project as a ZIP file.
4. Share the ZIP file with the other devices and import it into each account.
5. Participants collect data in their own project and account.

Advantages

- Participants use separate accounts and projects rather than sharing access through one account.
- The same prepared project can be distributed to multiple devices.

Limitations and cautions

- Account creation and credential management add administrative work. Confirm account setup requirements with StraboField support if you need many accounts.
- A participant may lose access to collected data if they do not retain the login credentials for their account.
- Project files can be shared or copied outside the app. Separate accounts do not prevent someone from deliberately sharing an exported project file.
- This workflow is less convenient for collaboration because participants' data will not automatically appear together.
- Decide in advance who is responsible for project backups and final data collection.

Example: Independent field lab. Students collect data in the same area but should not see one another's work during the exercise.

1.5 Collaborative Group Workflows (Beta)

Choose this workflow when collaborators need to contribute to a shared research project using their own accounts.

One person owns the project and invites collaborators. For each collaborator, the owner can grant read-only or edit access. Edit access allows a collaborator to add data to the project; it does not allow them to edit or remove data contributed by other users. The project owner can turn off collaboration at any time.

Requirements for testing this beta feature

To test shared-project collaboration, you need both of the following:

1. Request access at strabospot.org to be added to the group that has access to the collaboration feature on the website.
2. Register for the StraboField beta through TestFlight and install StraboField version 100.0. Download the most recent TestFlight build available, as it will contain the newest updates.

These requirements are for testing the beta functionality.

Advantages

- Collaborators can use their own accounts.
- Read-only access lets collaborators view the shared project without adding data.

- Edit access lets collaborators contribute data without editing or removing other users' contributions.
- The project owner can turn off collaboration at any time.

Limitations and cautions

- Confirm how turning off collaboration affects collaborators' access to the project and any data they have already downloaded.
- The project owner should choose the appropriate access level for each collaborator.

Example: Research collaboration. A project lead invites collaborators to view or contribute data to a shared research project. Collaborators use their own accounts, and the project owner manages their access.

1.6 Test the Workflow Before Fieldwork

Before the activity, test the workflow on the same types of devices and accounts participants will use. Confirm that everyone can sign in, download the correct project, collect data offline if needed, and upload or recover their work. Test who can see, edit, download, and share each dataset.

For grading, the Field Notebook PDF may be a convenient review format. Before relying on it, confirm that it includes the information you need and whether it can be exported directly from the iPad without server access. If a map image is required, test an export or ask students to include a map screenshot with their submission.

2 Set Up: One Project, Dataset per Participant

Choose this workflow when participants should collect separate data that can later be viewed together. This is useful for a field activity in which groups cover different areas, or focus on different mapping aspects and then interpret the combined data.

2.1 Group Fieldwork Preparation

Complete all preparation steps while reliable internet or cellular service is available. Install and open StraboField, sign in to the group account, download the [Project name] project, configure the datasets, and download the required basemap for offline use. Test the maps before entering the field area.

2.1.1 Download and Open StraboField

1. Connect the device to Wi-Fi or cellular data.

2. Open the App Store and search for **StraboField**.
3. Select **Get** or the download button.
4. After installation is complete, tap **Open**.

2.1.2 Sign In

1. On the opening screen, tap **Log in**.
2. Enter the group username: [Field-trip account username].
3. Enter the password provided by the group fieldwork leader.
4. Tap **Log in**.
5. Allow access to location, camera, and photos if prompted.

2.1.3 Project and Dataset Setup

Figure 1 provides a visual reference for the settings described below. The numbers in the visual key correspond to the callouts in the figure and the related steps.

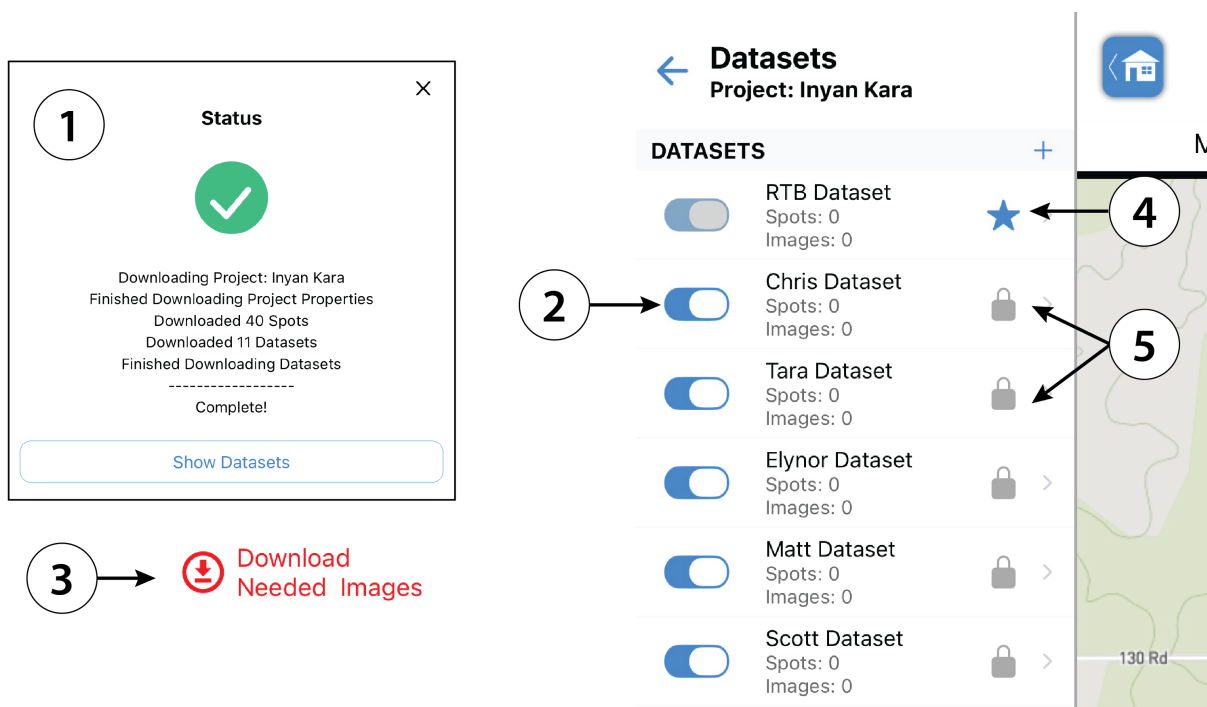


Figure 1. Project and dataset setup in StraboField.

Visual key:

1. **Project download:** A green checkmark confirms that the project downloaded successfully.
2. **Dataset visibility:** Visible datasets have a blue toggle positioned to the right.
3. **Associated images:** The download icon downloads associated images. Images may not be available during initial setup; download them after they are added to the project.
4. **Default dataset:** Your personal dataset has a blue star and is the default dataset.
5. **Read-only datasets:** All other datasets have **Is Read Only?** set to **ON**.

1. From the **Welcome to StraboSpot** screen, tap **Download**.
2. Select the project named **[Project name]**.
3. Tap the project name to open it.
4. On the **Status** page, confirm that the download completed and that a green checkmark is displayed.
5. Tap **Show Datasets**.
6. Set **Is Visible?** to **ON** for every dataset. The toggle should be blue and positioned to the right.
7. In the **[Shared dataset name]** dataset, tap the download icon to download associated images. Images may not be available until they have been added to the project.
8. Locate your personal dataset, **[Your personal dataset name]**, and tap its star icon. The star should turn blue, indicating that it is the default dataset.
9. For every other dataset, set **Is Read Only?** to **ON**. This helps prevent accidental edits to another participant's data.
10. Before continuing, confirm that:
 - your personal dataset has the blue default-dataset star; and
 - every other dataset is marked **Read Only**.
11. Tap **OK** to finish setup.

Important: Complete the dataset setup before collecting data. If you tap **OK** before selecting the default dataset or enabling read-only mode, open the **Datasets** page from the Home Menu and correct the settings before continuing.

If the project is not listed, confirm that you are using the correct account. If the project remains unavailable, contact the group fieldwork leader.

Manual

Section 3.2 Manage Project

2.1.4 Download the Basemap for Offline Use

Download and test all required basemaps before entering an area with limited or no connectivity. Download the [Required basemap] basemap for the relevant field area surrounding the [Area polygon or map feature].

Figure 2 shows the map area, basemap selection, download options, download confirmation, and offline verification methods.

1. Connect the device to Wi-Fi or cellular data.
2. Open the **[Project name]** project and its map.
3. Navigate to the relevant field area.
4. Locate the **[Area polygon or map feature]** by either:
 - zooming and panning until it is visible; or

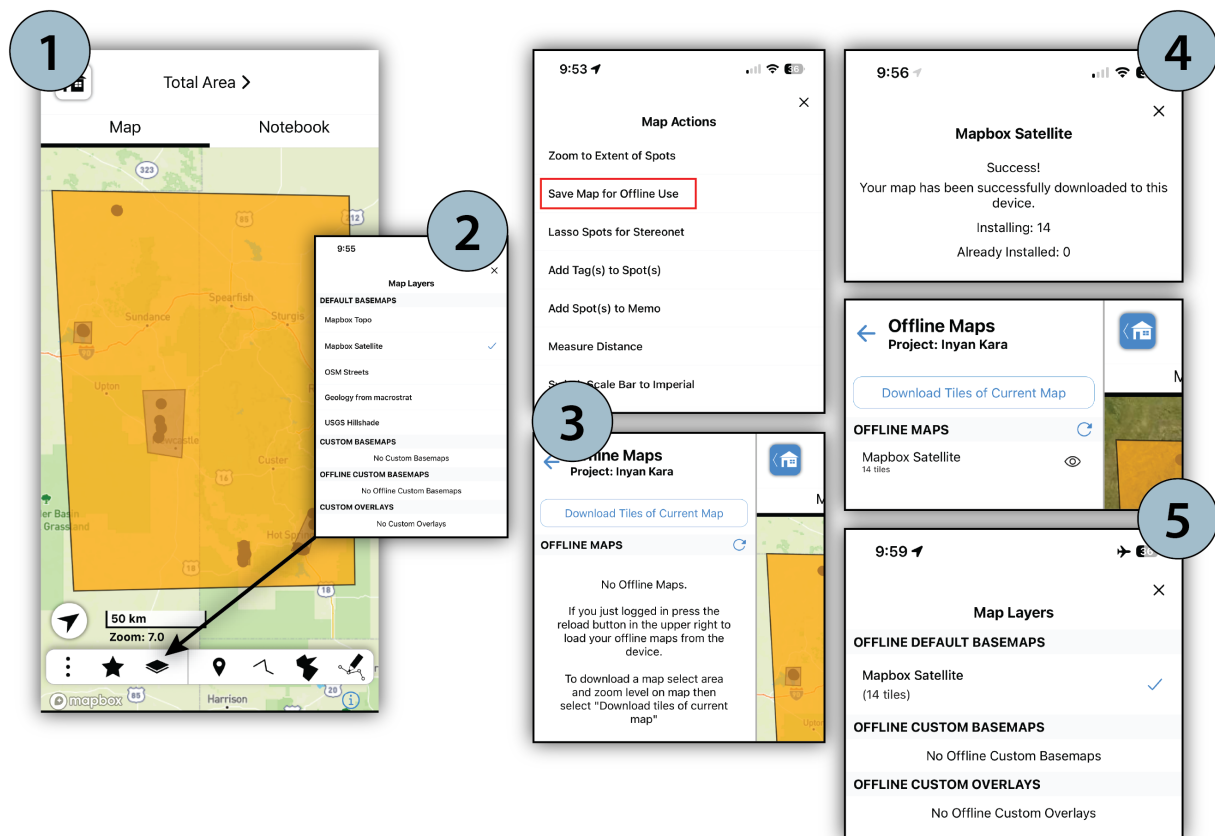


Figure 2. Downloading and verifying an offline basemap for the [Area polygon or map feature].

Visual key:

1. **Area feature:** Make the entire area feature visible and as large as possible without cutting it off.
2. **Map Layers menu:** Select [Required basemap].
3. **Download methods:** Use either the upper 3-dot **Map Actions** menu or the lower **Offline Maps** page.
4. **Download confirmation:** A success message appears when the download is complete.
5. **Offline verification:** Check the **Offline Maps** page or turn on airplane mode and confirm that the basemap appears on the map.

- opening the **Home Menu**, selecting **Spots**, and selecting [Area polygon or map feature].
5. If you opened the feature from the **Spots** page, open its notebook, tap the 3-dot button, and select **Zoom to Spot**.
 6. Adjust the map so the entire [Area polygon or map feature] is visible without being cut off.
 7. Open **Map Layers** and select [Required basemap].
 8. Open the 3-dot **Map Actions** menu and select **Save Map for Offline Use**.
 9. Scroll to the highest available zoom level and select **Download**.
 10. Wait for the download to finish, then select **Close**.
 11. Verify the download:

- (a) Open the **Home Menu**.
 - (b) Select **Offline Maps**.
 - (c) Confirm that the basemap is listed.
 - (d) Select the eye icon to confirm that the basemap is visible.
12. Turn on airplane mode, or temporarily disable Wi-Fi and cellular data.
 13. Reopen StraboField and confirm that the basemap loads without an internet connection.

Important: Complete the offline test before leaving reliable connectivity. If the map does not load, reconnect to the internet and repeat the download.

Final Preparation Check

Before beginning fieldwork, confirm that:

- the correct project is open;
- your personal dataset is the default dataset;
- all other datasets are marked **Read Only**; and
- the required basemap is available offline.

2.2 Ongoing Data Management

Data management has two separate phases:

After a Work Session: Save and Upload

After each fieldwork session, every participant must save a local backup and upload the project to the server.

Before the Next Work Session: Download the Updated Project

After all participants have uploaded their data, download the project again to receive the group's combined observations.

Before collecting, saving, or uploading data: Confirm that you are working in your assigned dataset and that all other datasets are marked **Read Only**. Do not edit another participant's dataset.

2.2.1 Save and Upload Data

Complete both steps after each fieldwork session.

1. Confirm that you are working in your assigned dataset and that all other datasets are marked **Read Only**.
2. Save a local backup:
 - (a) Open the **Home Menu**.
 - (b) Select **Backup**.
 - (c) Select **Save**.
 - (d) Wait for the save process to finish.

3. Upload the project:
 - (a) Confirm that the device has a reliable internet connection.
 - (b) Open the **Home Menu** and select **Backup**.
 - (c) Select **Upload**.
 - (d) Wait for the upload to finish.

Important: Save locally and upload after every fieldwork session. Do not close StraboField or leave the Backup page until each process is complete.

2.2.2 Download the Updated Project

After all participants have uploaded their data, download the current project before beginning the next fieldwork session.

1. Confirm that all participants have uploaded their data.
2. Open the project-switching menu by selecting the switch arrows in the upper-right corner. Alternatively, scroll to the **StraboField Projects** page in the account section.
3. Select **Download**, then select the **[Project name]** project.
4. Wait for the download to finish.
5. Open the downloaded project and confirm that the latest field data are available.
6. Open the **Datasets** page and confirm that:
 - all required datasets are visible;
 - your personal dataset is the default dataset, indicated by a blue star; and
 - all other datasets are marked **Read Only**.

Do not download the updated project until all participants have uploaded their data. Otherwise, the project may not contain the group's complete observations.

Group Fieldwork Leader Check – [Day or time for leader check]

Before fieldwork begins, open each participant's StraboField application and confirm that all required datasets are visible. Verify that each participant's personal dataset is the default dataset, indicated by a blue star, and that all other datasets are marked **Read Only**. Correct any settings before data collection begins.

Remind participants to **upload after each fieldwork session** and **download the updated project before the next session**. After each download, confirm that all required datasets are visible, the participant's personal dataset is the default, and all other datasets remain **Read Only**.

3 Set Up: Collaborative Group Workflows (Beta)

This section explains how to set up the **Shared Project with Invitations** workflow (Section 1.5) on the StraboSpot website: inviting people, choosing what each person can do, and ending or changing access. It covers account management only. Collecting data in the StraboField app works the same as in any other project.

Everything in this section is done on the **My StraboField Data** page of the StraboSpot website (strabospot.org/my_field_data), signed in to your own account.

This feature is in testing

Shared projects are in beta. The **Invite Collaborators** option appears only for accounts in the testing group. To use it, ask the StraboSpot team to add your account. Try it with a small practice project before relying on it for a class or field campaign.

3.1 Roles and Access Levels

Every shared project has one **owner**: the account that created the project. The owner invites **collaborators** and gives each one an access level.

- **Edit**: the collaborator can add their own datasets and data to the project.
- **Read Only**: the collaborator can view and download the project but cannot change it.

While the project is shared	Owner	Edit	Read Only
View and download all of the project's data	Yes	Yes	Yes
Add new datasets and photos	Yes	Yes	No
Change datasets they created	Yes	Yes	No
Change datasets someone else created	No	No	No
Add tags and reports (contributions are combined)	Yes	Yes	No
Change the project name, description and preferences	Yes	No	No
Make the project public	Yes	No	No
Invite, change or remove collaborators	Yes	No	No

Table 2. What each person can do in a shared project.

While a project is shared, **each dataset can only be changed by the person who created it**, and this includes the owner. This keeps one person's upload from overwriting another person's work. If the owner halts collaboration (Section 3.7), the owner can change every dataset again.

3.2 Before You Start

- **Everyone needs their own StraboSpot account.** Invitations are sent to the email address of an existing account. Ask each person to register at strabospot.org first, and to tell you the email address they registered with.
- **Invitees must not already have their own copy of the project.** If someone received the project earlier as a shared project file (for example, the ZIP workflow in Section 1.4) and uploaded it to their own account, they cannot be invited until they delete their copy. The same applies to a saved version of the project in their account.
- **Joining is a one-way step for a project.** Once someone has been a collaborator on a project, the server will not let them upload a separate copy of that project as their own.

3.3 Inviting Collaborators (Owner)

1. Sign in and open **My StraboField Data**.
2. Find the project under **My Projects**.
3. Open the project's **Options...** menu and choose **Invite Collaborators**. The **Project Collaborators** page opens.
4. Click **Invite Collaborators**.
5. Enter the email addresses of the people to invite, one per line.
6. Choose a **Collaboration Level: Read Only** or **Edit**. Everyone invited in one step gets the same level. You can change each person's level later.
7. Click **Invite Users**.

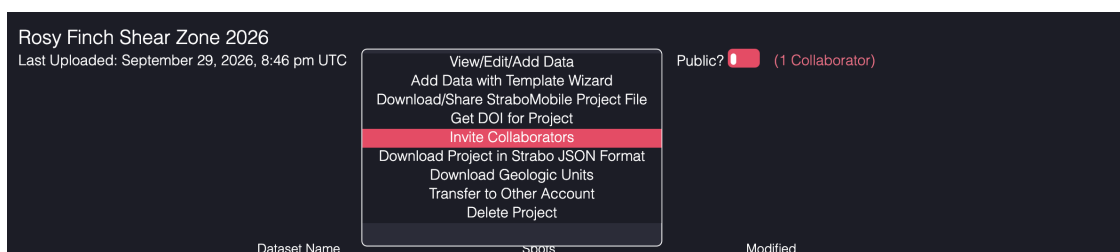


Figure 3. The **Options...** menu of a project under My Projects, with **Invite Collaborators** highlighted.

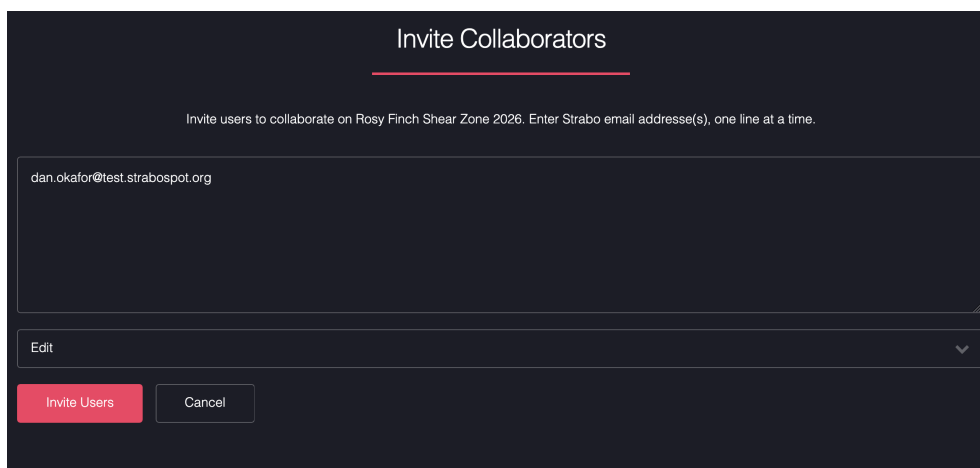


Figure 4. The Invite Collaborators page: one email address per line, and the collaboration level.

You return to the Project Collaborators page, which lists what happened to each address:

- **Invited:** the invitation was created and an invitation email was sent.
- **Updated:** the person was already invited or already a collaborator. Their level was changed to the one you chose, and no new email was sent.
- **Not invited:** for example, no StraboSpot account uses that address, or the person already has their own copy of the project. The reason is shown next to the address.

Each invited person appears in the list with the status **Pending** until they accept, then **Active**.

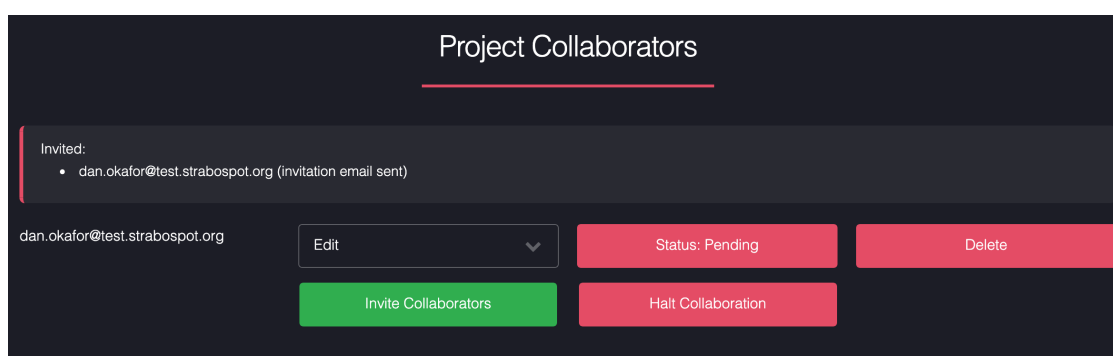


Figure 5. Project Collaborators after an invitation: the result of the invitation, and the new collaborator with the status Pending.

3.4 Accepting an Invitation (Collaborator)

1. Open the invitation email, titled *You are invited to collaborate on a StraboField project*, and click **Review the invitation**. You can also go straight to **My StraboField Data**.
2. Sign in with the account the invitation was sent to.
3. At the top of the page, under *You have been invited to collaborate on the following StraboField Projects*, click **Accept** or **Deny**.

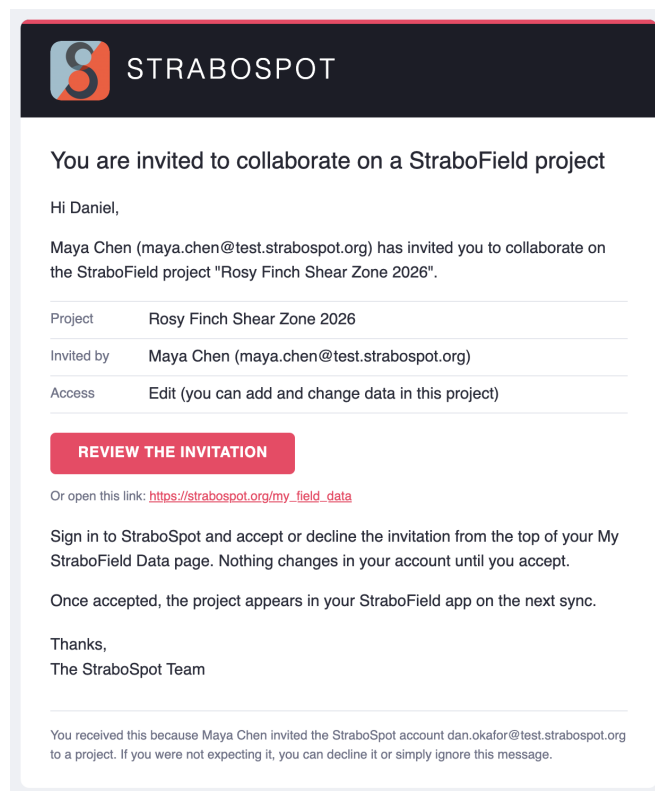


Figure 6. The invitation email.

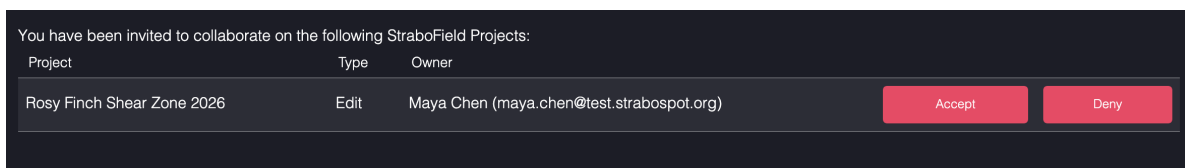


Figure 7. A pending invitation at the top of the collaborator's My StraboField Data page.

Nothing changes in your account until you accept. After you accept, the project appears in your StraboField app the next time it syncs, and in the **Collaborative Projects** part of My StraboField Data.

If accepting shows an error saying you have your own copy of the project, delete that copy from your account (on the My StraboField Data page) and accept again.

3.5 What Collaborators See on the Website

Shared projects are listed under **Collaborative Projects**, above the collaborator's own projects. Each entry shows who owns the project and the collaborator's access level (Figure 8). From the website, collaborators can download the project and its datasets in all the usual formats (for example, the StraboMobile project file, shapefiles, KMZ, spreadsheets and the Field Book). Collaborators add and change data in the StraboField app. For now, only the owner can use web editing (**View/Edit/Add Data**).

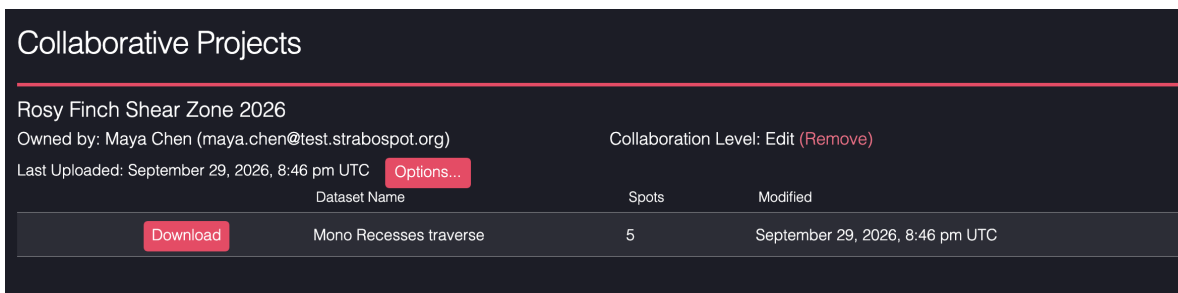


Figure 8. A shared project as the collaborator sees it on My StraboField Data. **(Remove)** leaves the project (Section 3.8).

3.6 Managing Collaborators (Owner)

Open **Project Collaborators** from the project's **Options...** menu, or click the **(N Collaborators)** link shown with the project on My StraboField Data.

- **Change a level:** pick **Read Only** or **Edit** in the person's drop-down. The change is saved immediately.
- **Remove one person:** click **Delete** next to their address. They lose access to the project, and it disappears from their Collaborative Projects. To bring them back, invite them again. They will need to accept again.
- **Invite more people:** click **Invite Collaborators** at any time.

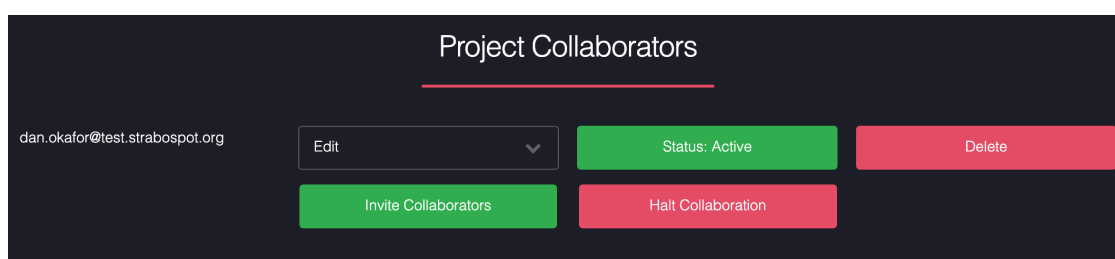


Figure 9. Project Collaborators with an active collaborator: the level drop-down, **Delete**, **Invite Collaborators** and **Halt Collaboration**.

On the website, the owner can delete any dataset in the project, including datasets created by collaborators. Agree with the team before deleting someone else's work.

3.7 Halting and Resuming Collaboration (Owner)

Halt Collaboration, on the Project Collaborators page, stops the whole team from changing the project in one step:

- Collaborators can no longer change anything. They keep read-only access to the project, but it no longer appears in their Collaborative Projects on the website.
- The owner can change every dataset again, including datasets collaborators created.

Halting is useful at the end of a field season or course, when the owner wants to tidy up or finalize the project.

To resume, invite the same people again. People who were active before the halt become active again right away at the level you choose. Anyone who had not yet accepted receives a new invitation.

3.8 Leaving a Shared Project (Collaborator)

On My StraboField Data, find the project under **Collaborative Projects** and click **(Remove)** next to the collaboration level. You lose access to the project. The owner can invite you again later.

3.9 Answers to the Testing Questions

Section 1.5 lists questions to test before fieldwork. This is how the website currently handles them.

Can collaborators edit only their own datasets, or other project content too?

Edit collaborators can change only the datasets they created. They can also add project tags and reports, which are combined with everyone else's. They cannot change the project name, description or preferences (Table 2).

Which permissions can the project owner set?

Read Only or Edit, separately for each person, at any time.

What happens when access is revoked? Can a collaborator keep data already downloaded?

A removed collaborator loses access on the server. The server cannot remove copies already saved on a device or files already downloaded. After a halt, collaborators keep read-only access.

Can collaborators copy another person's dataset into their own project and modify it?

They cannot change it in the shared project. Anyone with access, including Read Only collaborators, can download any dataset in the usual export formats. The server will not accept an upload of the shared project as a collaborator's own separate project.

Can a collaborator invite additional people or share the project onward?

Only the owner can invite or manage collaborators. However, any collaborator can download the project file and share that copy outside StraboSpot, so a shared project is not a way to keep data from leaving the group.

3.10 Related: Transferring a Project to Another Account

A different option in the project's **Options...** menu, **Transfer to Other Account**, hands a whole project to another StraboSpot account, for example from a student to their advisor. The receiving account must accept the transfer. Existing collaborators keep their access after a transfer, and the previous owner can choose to stay on the project as a collaborator. A transfer cannot be undone once it is accepted.