

# NoteM8 - Getting Started

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# Initial Setup

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# First Launch

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The first time you launch NoteM8 you will be asked to enter a 4 digit pin or create a new user.

If this is your first time using NoteM8 click on **“Create User”**



Create Pin

New User  
Please enter a four-digit PIN  
for this application.

— — — —

OR

Create User

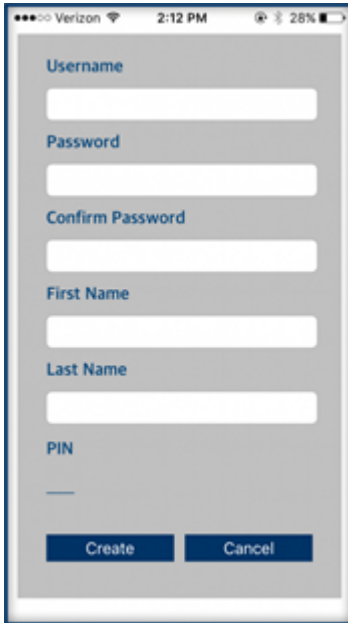
Cancel

\* If you work with an agency that is already using NoteM8 and Presynct for reporting click [here](#) for more help.

# Account Creation

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After clicking on Create User you'll be taken to the account creation screen. Here you can enter your account information.



The screenshot shows a mobile application interface for account creation. At the top, the status bar displays 'Verizon', signal strength, time '2:12 PM', and battery level '28%'. The main form has the following fields: 'Username' (with a red exclamation mark icon), 'Password', 'Confirm Password', 'First Name', 'Last Name', and 'PIN'. At the bottom, there are two buttons: 'Create' and 'Cancel'.

! Your username must be an email.

! Your password must be 8 characters long and have 1 uppercase letter and 1 special character.

After entering your account info and selecting a 4 digit pin, you will receive an email with instructions on how to activate your account.


# Syncing Templates


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After following the link in your email to activate your account we are ready to sync report templates.

To sync report templates:

1. Open NoteM8 and enter your 4 digit pin
2. Enter a value for Retention Time
3. Enter your User Name and password and then hit Synchronize

 Retention Time is the length of time in days to keep reports on your device once they have been uploaded to the server.

 To have NoteM8 automatically sync templates in the future, change the value of Sync Gadgets. This value is the length of time in minutes to wait before looking for new templates.

 If you are setting up NoteM8 as a new user, Sync URL should already be populated with “notem8.presynct.net/ondemand”. If Sync URL is blank enter “notem8.presynct.net/ondemand”

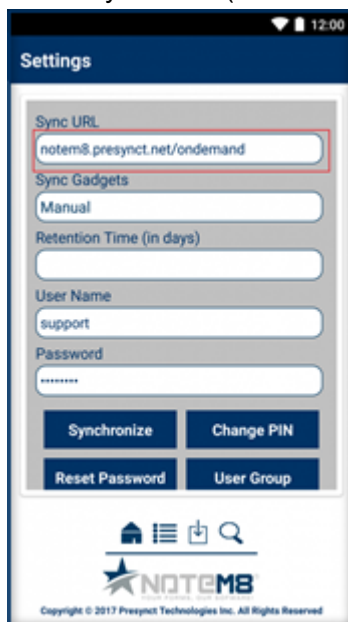
# Agency Setup

If you are working with an agency that is already using Presynct and NoteM8 to write reports, getting started is a little different:

1. Open NoteM8 app
2. Create a 4 digit pin



3. Re-enter 4 digit pin
4. Enter Sync URL (ex: notem8.presynct.com/ondemand)



5. Enter a value for retention Time
6. Enter your Presynct user name and password
7. Tap Synchronize

! If you do not know your sync URL please contact your agency or [support@presynct.com](mailto:support@presynct.com) for more help.

\* Retention Time is the length of time in days to keep reports on your device once they have been uploaded to the server.

\* To have NoteM8 automatically sync templates in the future, change the value of Sync Gadgets. This value is the length of time in minutes to wait before looking for new templates.

# Reports

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- [Writing Reports](#)
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- [Managing Reports](#)



# Writing Reports

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- [Creating A New Report](#)
- [I.D. Scanning](#)
- [Adding & Managing Media](#)

# Creating A New Report

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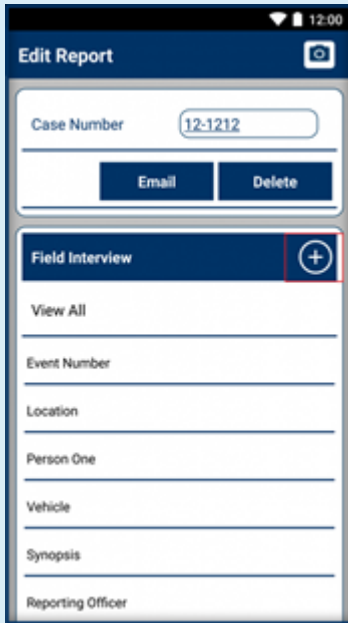
1. Open NoteM8
2. Select the type of form you would like to use for your report from the Available Reports tab



3. Enter a Case Number
4. Tap the section of the report you would like to start filling out.

\* View All will load all report sections at once. You can expand or collapse a section by tapping on the blue bar for that section.

\* You may add another page to your report by clicking the + button on the report summary screen.



# I.D. Scanning

Report sections that capture a person's information can utilize I.D. scanning to quickly and accurately enter that person's information. These sections are marked with a bar code icon.

## Capturing person info using the I.D. Scanner

1. Create a new report
2. Navigate to a Person section

3. Tap the bar code icon on the right

4. Lay the ID card on a flat surface
5. Position your camera so the bar code lines up with the box on your screen

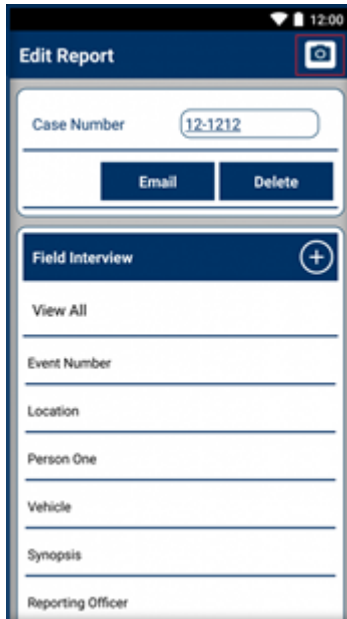
When you have successfully scanned the bar code you will hear a beep and be returned to the report

# Adding & Managing Media

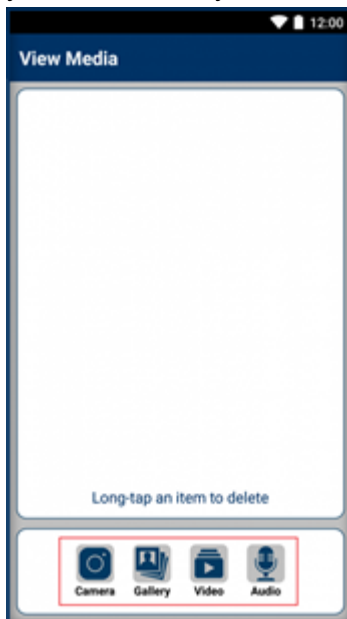
NoteM8 allows you to capture photos, videos and audio and upload them directly to your reports. You may also upload items from your phone's gallery.

## Adding Media

1. Tap the camera icon on the top right of the report screen

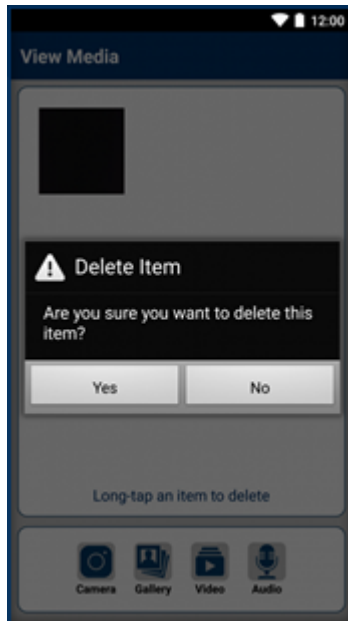


2. Select the type of media you would like to capture or choose Gallery to upload photos or video that you have already taken



## Deleting Media

1. Tap the camera icon on the top right of the report screen
2. Press and hold on the item you would like to delete
3. Confirm that you would like to delete the item



# GPS Pin

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Android users are able to use their phones GPS to get an approximate address.

## Using the GPS Pin:

1. Navigate to a report section that has an address field

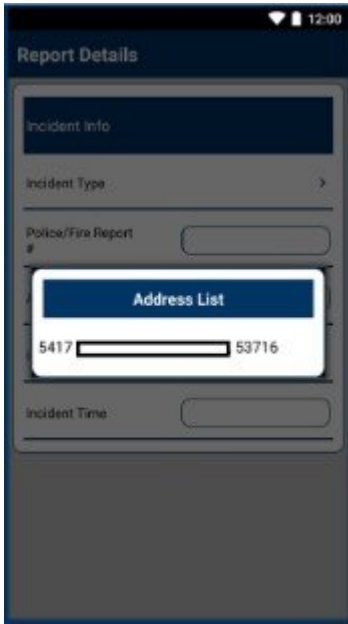


2. Tap the location pin



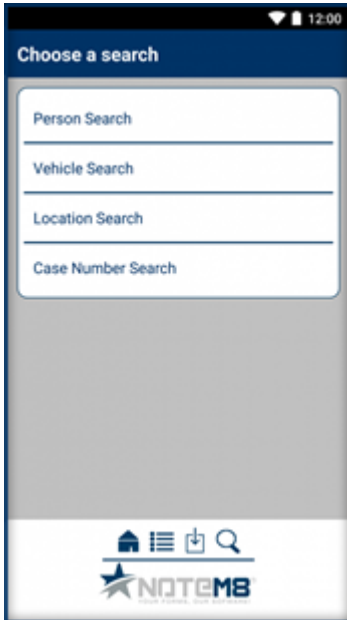


### 3. Select the address



# Searching For Reports

You can use NoteM8 to search for a case number, or person, vehicle or location information.



## To perform a search:

1. Tap Search on the bottom left of your screen



2. Choose the type of search you would like to perform
3. Enter search criteria
4. Press Search

\* To search for reports you have already uploaded to the Presynct server, slide the Search Online slider near the bottom of the screen



# Managing Reports

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# Unsynchronized Reports

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Unsynchronized reports are reports that have been created on your device but have not been uploaded to the Presynct server. Unsynchronized reports can still be edited by the user.



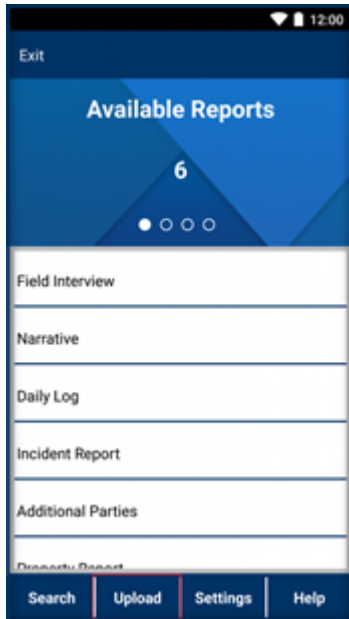
To view Unsynchronized Reports, swipe left from the Available Reports tab.

# Uploading Reports

When you have finished writing your report. You will want to upload your report to the Presynct server archival purposes.

## To upload a report:

1. Tap Upload near the bottom of the screen



2. Check the box next to each report you would like to upload



3. Press the Upload button near the middle of your screen



Reports may also be uploaded from the Unsynchronized Reports tab by tapping and holding the report that you would like to upload.

# Synchronized Reports

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The synchronized reports tab holds all of your reports that you have uploaded to the Presynct server.



## Viewing Synchronized Reports:

1. Navigate to the Synchronized Reports tab by swiping left from the Available Reports tab
2. Tap on the report you would like to view

\* Synchronized Reports can no longer be edited on your device

\* You may download a PDF version of your report by tapping on the Download button next to the report number.



# PDF Reports


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Reports that you have downloaded PDF copies of will be available in the PDF Reports tab



## Viewing PDF Reports:

1. Navigate to the PDF Reports tab by swiping left from the Available Reports tab
2. Tap the report you would like to view

 PDF Reports will be opened by your default PDF viewer

# Emailing Reports

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Unsynchronized reports can be emailed to others using your default email app

## To email a report:

1. From the Unsynchronized Reports tab tap on the report you would like to email
2. Tap the Email button



3. Review and send the Email from your default email app

# Deleting Reports

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Both unsynchronized and synchronized reports may be deleted from your device

## To delete a report

1. Navigate to either the unsynchronized or synchronized report tab
2. Tap on the report you would like to delete
3. Press the Delete button

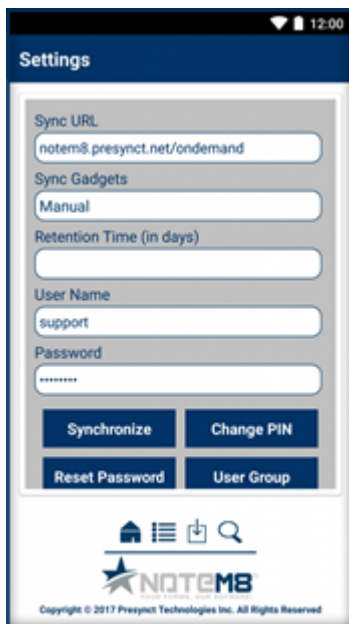


4. Confirm that you would like to delete the report

\* You may also delete a report by tapping and holding on the report you would like to delete

# Settings

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## Sync URL

Sync URL is the URL you use to sync templates from the server. The default is `notem8.presynct.net/ondemand`

## Sync Gadgets

The Sync Gadgets option controls the amount of time in minutes the server should wait before checking for new templates. The default option is manual meaning that templates must be manually synced using the Synchronize Button

## Retention Time

Retention Time is the length of time in days to keep synchronized reports stored on your device

## User Name

User Name is the email you used when creating your account, or if you are an agency that is already using Presynct you would use the same User Name that you do to access the Presynct web app.

## Password

Your password is the password you used when first creating your account. If you forget your password you may reset it using the Reset Password button.

## Synchronize

The Synchronize button will pull the most updated report templates from the Presynct server

## Change PIN

The Change PIN button will help you reset the PIN number you use to log in.

## Reset Password

If you would like to change your password you can do so using the Reset Password button.

### Changing your password

1. Tap Reset Password
2. Enter your user name
3. Enter your current password
4. Enter your new password
5. Re-enter your new password to confirm
6. Tap Reset
7. Check your for a link to finish resetting your password

## User Group

If your agency is using the Presynct web app to write reports, you may have permissions turned on. You can use the User Group button to select which group you would like to write reports under.



For more information regarding permissions and user groups please contact [support@presynct.com](mailto:support@presynct.com)