



Trimble Unity[®]

Trimble Unity Field for Maintain and Permit Guide

By Trimble, Inc.

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Table of Contents

- Introduction: Trimble Unity Field for Maintain and Permit Guide 1**
- Release Notes 2**
 - Trimble Unity Field 1.6.x Release Notes 2
 - Trimble Unity Field 1.6.1 Release Notes 2
 - GIS 2
 - Work Activities 2
 - Trimble Unity Field 1.6 Release Notes 2
 - Overall 2
 - Log In 3
 - Map 3
 - Work Activities 3
 - Permit 3
 - Settings 4
 - GIS 4
 - Resolved Known Issues 4
 - Work Activities 4
 - Map 5
 - Labor, Equipment, and Material 5
 - Work Activities 5
- Trimble Unity Field 1.5.x Release Notes 5
 - Trimble Unity Field 1.5.2 Release Notes 5
 - Trimble Unity Field 1.5 Release Notes 5
 - Log In 5

Attachments	6
Map	6
Work Activities	6
GIS	6
Resolved Known Issues	7
Labor, Equipment, and Material	7
Work Activities	7
Trimble Unity Field 1.4.x Release Notes	7
Trimble Unity Field 1.4.2 Release Notes	7
Resolved Known Issues	7
Settings	7
Trimble Unity Field 1.4 Release Notes	8
Attachments	8
Map	8
Work Activities	8
Settings	9
Resolved Known Issues	9
Work Activities	9
Work Activities	9
Trimble Unity Field 1.3 Release Notes	9
GIS	9
Trimble Unity Field 1.2.x Release Notes	10
Trimble Unity Field 1.2.1 Release Notes	10
Trimble Unity Field 1.2 Release Notes	10
Overall	10

Camera	10
Map	10
Work Activities	10
Trimble Unity Field 1.1 Release Notes	11
Overall	11
Map	11
Work Activities	11
Resolved Known Issues	12
Map	12
Trimble Unity Field 1.0 Release Notes	12
What's New	12
Overall	12
Log In	12
Map	13
Work Activities	13
Attachments	13
GIS	13
Trimble Unity Field Known Limitations	14
GIS	14
Work Activities	14
Compatibility	15
Get Started	16
System Requirements And Installation Instructions	16
System Requirements	16
Android	16

Apple iOS	16
Microsoft Windows	17
More Information	17
Installation Instructions	17
Apple App Store	17
Google Play Store	17
Microsoft Windows	18
Configure the Redirect URI	18
Log In	18
Access Help Resources	22
Initial Offline Sync	23
App Settings	23
GPS	24
Sync	25
Offline Cache	25
App Logs	26
Media Attachments	26
About	26
Connect to the GNSS Receiver	26
Navigating Trimble Unity Field	29
Work Activity List	30
Filters	31
Work Activity Actions	34
Quick Actions Menu	34
Work Activity Pages	34

Log Out	36
Clear the Offline Map Cache	37
Work Activities	40
View and Manage Work Activities	40
View Work Activity Lists and Summary Cards	41
View and Select Work Activities on the Map	45
Search for Work Activities	49
Sort And Filter Work Activities	50
Status, Priority, Template, Description Filters	52
Projected Start and Projected Complete Filters	52
Download and Apply Saved Filters	53
Manage Saved Filters	54
View Work Activity Details	55
Activity Types	58
Work Orders	58
Work Order Tasks	59
Work Order Fields	61
Inspections	62
Maintenance Quality Assurance Inspection Observations	63
Inspection Observation Attachments	64
Add Signatures	67
Inspection Fields	68
Service Requests	69
Service Request Fields	70
Cases	71

Case Tasks	76
Case Violations	80
Case Fields	81
Asset-Based Work Activities	82
Create Asset-Based Work Activities	83
From One Asset	84
From Multiple Assets	85
Select Assets on the Map	86
Search For Assets	90
Asset Details	93
Associated Assets	95
Location-Based Work Activities	101
Create Location-Based Work Activities	102
Quick Capture a Work Activity Location Using GNSS	105
Manually Digitize a Work Activity Location from the Map	106
Locate a Work Activity Address	108
Weather Data	111
Work Activity Drafts	117
Save Work Activity As Local Draft	117
Discard a Local Draft Work Activity	118
Update Work Activities	119
Forms	120
View and Perform a Manual Sync	125
Open In Web	125
Assign Work Activities	128

Associate Existing Work Order to a Project	129
Locate Assets Using Locate	129
Capture Location	130
Go To Work Location	131
Add Attachments	133
Attach a Photo	135
Attach Multiple Photos	136
Take a Video	136
Attach One or Multiple Videos	137
From a Work Activity	138
From Asset Details	139
Add Costs	140
Add Labor	142
Add Equipment	143
Add Material	143
Create and View a Related Work Activity	148
Complete the Work Activity	152
Take Action to Progress the Workflow	153
GIS Feature Data Collection	154
Collect a New GIS Feature or Asset	154
Quick Capture GIS Features and Assets Using GNSS	156
Manually Digitize GIS Features and Assets from the Map	158
Capture Location Methods	159
Edit GIS Feature and Asset Data	163
Map	168

Select GIS Features from the Map	169
Toggle the Visibility and Selection of Layers	173
View My Location on the Map	174
Center the Map to My Location	176
Follow My Orientation	176
More Actions Menu	177
Switch Web Maps	178
Offline Map Areas	179
Switch Base Maps	183
View Legend and Symbology Details	186
Search for Specific GIS Features	187
Search for an Address	189
Search GIS Features Using the Barcode Scanner	191
Get Driving Directions to Selected GIS Features	192
Locate Selected Features Using GPS	193
View Details of Selected GIS Features	193
Show Distance and Bearing and My Location On Maps	194
Troubleshooting Issues	198
Contact Support	201

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Introduction: Trimble Unity Field for Maintain and Permit Guide

The Trimble Unity Field app is a configurable office-to-field solution with phone and tablet support offering role-based project management, long-term asset maintenance workflows, and Geographic Information System (GIS)-centric data collection and visualization. Users can create and edit asset-based or location-based work activities, which are then visible on the map or in the activity list.

The app can be used without constant internet connectivity, allowing users to capture data, upload attachments, assign work activities, fill out forms, and complete other action-based workflows with or without an internet connection. When connected to the internet, syncing occurs automatically at configurable intervals. When not connected to the internet, local drafts and work activity updates are stored locally on the device until internet connection is restored.

With integrated annotation tools, streamlined field data collection, configurable smart forms, and more, the app provides quick access to information required to complete workflows.

Trimble Unity Field supports English and Italian.

Release Notes

This section includes release notes for Trimble Unity Field for Maintain and Permit. See [Trimble Unity Platform Release Notes](#) for related platform release notes.

Topics in this section:

Trimble Unity Field 1.6.x Release Notes

Trimble Unity Field 1.6.1 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

GIS

- GNSS metadata is saved when creating or editing GIS features. (4192)

Issues Addressed

The following is a list of issues addressed in this version.

Work Activities

- Edits made to service request custom category date fields were not retained and reverted to the previous value upon saving. (4214)

Trimble Unity Field 1.6 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Overall

- Auto-syncing has been expanded to more pages, allowing the app to sync more frequently based on user settings. (3849)

Log In

- If a user enters an incorrect password three times in a row within a 15-minute period, their account is temporarily locked and they are prompted to try again after 30 minutes. Both the number of attempts and the lockout duration are configurable. (3432)

Map

- Map markers and activity icons have been updated with new colors and text to improve accessibility, enhance readability, and meet compliance with Web Content Accessibility Guidelines (WCAG). (3787)
- Web maps that the user has access to can be downloaded. (3851)
- Populating web maps has been updated. (3852)
- Users can see a list of available web maps, including an image of the web map, the name, and the number of available or downloaded offline maps for the web map. The list of web maps is downloaded during a sync. (3853)
- Android, desktop, and iOS users can change the selected web map. (3854, 3855, 3856)

Work Activities

This includes service requests, work orders, and inspections.

- Users can download and select a default saved filter in Trimble Unity Field that corresponds to a saved query in Trimble Unity Respond. This selected filter is retained if the user logs out and logs back in. (3825)
- An **Assigned to Me** label has been added to summary cards and the **Activity Types** panel, which also includes a number corresponding to how many work activity items are assigned to the user for each activity type. (3928)

Permit

This includes cases, case tasks, and case violations.

- Permit functionality is displayed and accessible only to users with the appropriate licensing. (4094)
- Users can create, view, and edit cases directly in the field, supporting the full intake process. This includes initiating new cases, viewing cases on the map, completing task checklists, and detailing violation completions for more efficient case management. (3714, 3754, 3757)

- **Cases** are visible in the work activity list. Summary cards display relevant case fields. (3714, 3752, 3759)
- Users can search cases in the work activity list by case number, tag, and address. (3760)
- Users can view, search, and access **Case Tasks** and **Case Violations** in the work activity list or from parent **Cases**. (3987, 3900, 3967, 3971)
- A default query has been implemented for cases, case tasks, and case violations. (4109, 4110)
- Comments can be added to a new or existing case. (3756)
- Attachments can be added to a new or existing case. (3755)
- Where configured, case task checklists can be viewed and updated in the app. (3969)
- When a task has an inspection request, details including the **Requested By** user, the request **Date & Time**, and **Phone** number can be viewed. (3968)

Settings

- The **Sync** settings have been updated, allowing users to select **Download Interval** and **Upload Frequency** settings from a predefined list to better understand the expected automatic sync behavior when enabled. (3845)
- **Sync** settings are available after the initial login, ensuring the correct auto-sync options display depending on your organization. (3846)

GIS

- Users can directly collect and update GIS feature and asset data in the field by capturing locations and metadata via GNSS positioning, manual digitization (through points, lines, or polygons), or by entering attribute details. (3857, 3859, 3860, 3861, 3878, 3987, 3993)
- Existing GIS feature and asset data can be edited. (3991)

Known Issues

Resolved Known Issues

The following is a list of resolved issues.

Work Activities

- Edits made to service request custom category date fields were not retained and reverted to the previous value upon saving. (4214)
 - Trimble Unity Field 1.6.1

Issues Addressed

The following is a list of issues addressed in this version.

Map

- A "Licensed for Developer Use Only" message was shown on the map when the app was opened. (3784)

Labor, Equipment, and Material

- Users were required to enter an end date for labor and equipment additions. (3665)
- An issue prevented the **Costs** page from appearing for inspections and users could not add equipment, labor, and materials. (3940)

Work Activities

- Action items showed unformatted HTML tags instead of properly displayed text. (3784)

Trimble Unity Field 1.5.x Release Notes

Trimble Unity Field 1.5.2 Release Notes

This release does not include any changes to the Trimble Unity Field for Maintain functionality.

Trimble Unity Field 1.5 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Log In

- Users can clear the **Organization**, **Username**, and **Password** fields on the login screen and have the option to show or hide their password to confirm it was entered correctly. (2217)
- After successfully logging in to the app on Android/iOS, the device's internal credential manager prompts the user to save login information, including biometric data, for faster access in the future. If accepted, the user's credentials automatically fill on subsequent logins. (3502)

Attachments

- Photos taken in the field have the option to display a text-based date and time stamp directly on the image, eliminating the need to access EXIF/metadata properties separately. (3454, 3455, 3643)

Map

- Feature layer selection has been updated, allowing users to manage map layer visibility and searchability. (76)
- When viewing the map and GIS data, users can view the legend and symbology associated with GIS layers to better understand map features. (1452, 3456)
- Tapping on an activity or asset card on the map opens its details. (3625)
- Users can switch between available ArcGIS Online base maps using the **Base Map Selection Tool** to better account for current conditions and visibility when connected to the internet. (3116, 3927)
- Users can select, download, and switch between multiple offline map areas associated with a single web map to improve offline workflows. (3620)

Work Activities

This includes service requests, work orders, and inspections.

- Users can directly add, view, and edit attachments within observation fields for inspections to improve the clarity of inspection data, leading to faster decision making and more effective asset management. (3114)
- Configured tasks are added automatically to work orders when created. (3627)
- The work order details page displays whether tasks exist and shows the number of completed tasks versus the total number of tasks. (3628)
- Users can automatically populate accurate, real-time weather data based on a user's current location in configured linear inspections when connected to the internet. (3737)

GIS

- Users can search for GIS assets by scanning a linear barcode, a QR code, or by manually entering searchable asset details without an offline map area. (3457, 3616)
- Users can locate specific non-spatial assets that are related to GIS assets online or offline by scanning a linear barcode, a QR code, or by manually entering searchable non-spatial asset details. (3458, 3459)
- Both online and offline asset searches have been updated to use the search configuration from the web map to standardize search behavior, allowing users to find assets without having to navigate through related features or hierarchies. (3683)

Known Issues

Resolved Known Issues

Labor, Equipment, and Material

- Users were required to enter an end date for labor and equipment additions. (3665)
 - Trimble Unity Field 1.6
- An issue prevented the **Costs** page from appearing for inspections and users could not add equipment, labor, and materials. (3940)
 - Trimble Unity Field 1.6

Issues Addressed

The following is a list of issues addressed in this version.

Work Activities

- When a custom code was used as the observation answer format, the answers displayed the coded value instead of the description. (3642)

Trimble Unity Field 1.4.x Release Notes

Trimble Unity Field 1.4.2 Release Notes

Known Issues

Resolved Known Issues

The following is a list of resolved issues.

Settings

- The Trimble Mobile Manager (TMM) integration was updated to the latest version. (3557)
 - Trimble Unity Field 1.4.2

Trimble Unity Field 1.4 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Attachments

- Users can select and upload multiple photos and videos from the device's camera roll/gallery. (591, 2840)
- The name and description fields on a file or attachment can be edited. (3085)

Map

- The map zooms to the same activity pin view whether you tap the **Zoom** icon from the activity card or from the activity list. (2478)
- The **My Location** icon allows users to toggle between the following pan modes: center the map on the user's location, follow the user's orientation, and lock the map to a North-up orientation. (2998, 3076)
- GPS location services are supported on Windows devices. (3059)
- When a user taps the **Map** icon on a work activity summary card, the map zooms to the highlighted work activity pin and the activity card is shown. The map view remains the same even after closing the activity card. (3295)
- The map zooms to display all work activities when opened. (3294)
- When a user logs out and logs back in, the map resets to show all work activities. (3296)

Work Activities

This includes service requests, work orders, and inspections.

- Trimble Unity Maintain Admin and Respond Dashboard users can accurately track field work activity progress and audit activity creation details, including user and device information, using the **InitiatedByApp** field. (3072)
- Users can search and filter work activities using the **Address** field, which is displayed by default on summary cards. (3273)
- Users can view statuses and take action on associated assets and related work activities directly from the map. (3113, 3265)
- Users can create service requests in the field with or without associated GIS assets. (3044, 3045, 3275, 3350, 3351, 3483)
- Custom fields are included in service requests. (3079)
- A work order can be created from a service request. (3062)

- Work orders can be marked as billable to a specific contractor or subcontractor for reporting purposes, billbacks, and legal recourse. (3058)

Settings

- The **Regular Sync Interval (s)** setting allows users to adjust the regular sync interval frequency in seconds. (1895)
- The Trimble Mobile Manager (TMM) integration was updated to the latest version, enabling enhanced functionality. (3115)

Known Issues

Resolved Known Issues

The following is a list of resolved issues.

Work Activities

- When a custom code was used as the observation answer format, the answers displayed the coded value instead of the description. (3642)
 - Trimble Unity Field 1.5

Issues Addressed

The following is a list of issues addressed in this version.

Work Activities

- When zooming to an activity with multiple associated assets, users were unable to select more than one asset on the map to take action on. (3007)

Trimble Unity Field 1.3 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

GIS

- Users can search for GIS assets by scanning a linear barcode or a QR code using the barcode scanner that has been added to the top search bar on the map and activities screens, or by manually entering any searchable asset details. (2770, 2771, 2772, 2773, 2774)

- Users logged in with the correct Esri license level can edit asset details and update GIS asset attributes. (2775, 2776, 2779, 2780, 2781, 2880)
- Users can view GIS attachments for selected assets. (2877)
- Users can view the status of a downloaded offline map area and can refresh the offline GIS cache. (2802)

Trimble Unity Field 1.2.x Release Notes

Trimble Unity Field 1.2.1 Release Notes

This release does not include any changes to the Trimble Unity Field for Maintain functionality.

Trimble Unity Field 1.2 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Overall

- The bottom navigation menu has been updated to add more contrast and a visual divider. (1900)

Camera

- Support for the Windows platform camera has been added. (2518)

Map

- Tapping on a selected work activity result in the **Activities** panel opens the work activity details page. (1910)
- When viewing a work activity on the map, users can tap an associated asset to view the **Asset Details** screen. (2355)

Work Activities

This includes service requests, work orders, and inspections.

- Users can view **Description**, **Instructions**, and **Explanation** fields for inspection observations where configured. (1731)

- A filterable material field has been added that shows the available stock and a numeric text field. (2638)
- A user can select a crew and a storeroom when adding materials, provided they are licensed for Storeroom and Storeroom is enabled. (2550)
- A user's crew, default storeroom, and material stock quantities are requested via the API and stored offline. (2551)
- Material lists can be filtered in a selected storeroom or List of Materials. (2552)
- When syncing, the storeroom stock on hand is updated. (2554)

Trimble Unity Field 1.1 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Overall

- Icons and menus have been updated throughout the app to ensure visual consistency and standardized terminology. (1655)

Map

- Users can select single or multiple assets via the map to open the **Asset Details** screen and access the following options: **Zoom**, **Directions**, **Locate**, **Web**, and **Create**. (2349, 2350, 2353)
- Selecting a single asset on the map that has child assets opens the **Asset Details** screen, where users can access details about the selected asset and navigate through the asset hierarchy. (2351)

Work Activities

This includes service requests, work orders, and inspections.

- The **Quick Actions Menu** has been updated. (1811)
- The **Take Action** button has been updated. (1856)
- The **Back**, **Next**, and **Menu** icons have been updated. (1896)
- The **Done** button has been updated. (1897)
- The **Add** button has been updated. (1898)
- Assets can be selected via the **Associated Assets** screen or the **Asset Hierarchy** screen. (2352)

- When tapping an **Associated Assets** screen within a work order or an inspection, the **Asset Details** screen opens with the following options: **Zoom**, **Directions**, **Locate**, **Web**, and **Create**. (2354)
- Users can access Maintenance Quality Assurance (MQA) inspection observation answers and add or update the **Count** and **Total** fields. (2262)

Known Issues

Resolved Known Issues

The following is a list of resolved issues.

Map

- The map did not refresh when a **Saved Filter** was selected. (2427)
 - Trimble Unity Field 1.1.

Trimble Unity Field 1.0 Release Notes

What's New

The following is a list of what's new in this version of Trimble Unity Field.

Overall

- The app is compatible with Windows tablets and laptops, iOS devices, and Android devices.
- Split screen is available on tablets.
- Syncing occurs automatically based on a configurable interval when connected to the internet.

Log In

- An organization name is used to determine which cloud service instance the mobile user is connecting to.
- Users can access help documentation in the app.
- An initial offline sync downloads offline activities and GIS information based on the user's organization.

Map

- All assets associated with a work activity can be highlighted on and updated from the map.
- Distance, bearing, and user location are shown on the map.
- Users can select GIS features via a single tap on the map or by drawing a rectangle.

Work Activities

This includes service requests, work orders, and inspections.

- Work activities are displayed as summary cards in the work activity list, which can be filtered and sorted.
- Work activities can be saved as drafts before saving and syncing to the cloud.
- Incomplete drafts of work activities can be deleted.
- Work activities can be filtered by summary fields like **Status**, **Priority**, **Template**, and **Projected Start**.
- Users can review the history of work performed on an asset associated to a work activity by opening the asset in the web application.
- For inspection observations, required data entry fields can be shown or hidden based on predefined conditional rules.
- Users can update the status of all assets associated with a work activity from the work activity list or the map.
- Work activities can be directly edited.

Attachments

- Image markup has been added for attachments.
- Users can capture a map screenshot and mark it up with simple markup tools in iOS and Android.

GIS

- Users can locate assets using Advanced Locate, which utilizes high precision Trimble Global Navigation Satellite System (GNSS) technologies.
- Trimble high accuracy GNSS captures accurate 3D outdoor positions for work activities.
- GPS metadata (including Horizontal and Vertical Accuracy, Horizontal Dilution of Precision (HDOP), Position Dilution of Precision (PDOP), Mean Sea Level (MSL), tilt information, number of satellites, and source of GPS position) is captured and stored for iOS and Android.

Trimble Unity Field Known Limitations

The following is a list of known limitations in this version of Trimble Unity Field.

GIS

- Mobile map packages (MMPK) are not supported.
- Esri app linking is not supported.
- Geocoding services in the app are not supported.

Work Activities

- Service request templates with questions and answers that predetermine default fields are not supported.
- Viewing or adding material costs for service requests is not supported.
- Populating weather data is limited to linear inspections.
- Branch observations are not supported.

Compatibility

Trimble Unity Maintain, Trimble Unity Permit, and Trimble Unity Field are compatible with the following versions of ArcGIS:

- ArcGIS Enterprise 11.4
- ArcGIS Enterprise 11.3
- ArcGIS Enterprise 11.2
- ArcGIS Enterprise 11.1
- ArcGIS Enterprise 11.0
- ArcGIS Enterprise 10.9.1

See [Compatibility with ArcGIS Enterprise](#) in Esri's online help for the supported versions of Insights.

See "System Requirements And Installation Instructions" on page 16 for complete system requirements and installation instructions specific to Trimble Unity Field.

Get Started

Once you have installed the app, you can log in, access help resources, perform an initial offline sync, configure app settings, connect to the Global Navigation Satellite System (GNSS), and more.

✓ PREREQUISITES:

- Users must be licensed for Trimble Unity Field. This is done in Trimble Unity Admin by checking the Trimble Unity Field license check box. See [Assign Licensing](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit or contact your administrator for more information.

System Requirements And Installation Instructions

System Requirements

Trimble Unity Field supports three mobile platforms: Apple iOS, Google Android, and Microsoft Windows.

The following describes the minimum OS requirements for each of the platforms.

Android

- Supports both Android Phones and Tablets
- Can be downloaded from Google Play ([Link](#))
- Requires Android 13 or higher. We do not support older versions not maintained by Google

Apple iOS

- Supports both iPhones and iPads
- Can be downloaded from the Apple App Store ([Link](#))
- Requires Apple iOS 16 or higher. We do not support older versions not supported by Apple

Microsoft Windows

- Support Windows 10/11 tablets and laptops
- Can be downloaded from the following [Link](#)
- Minimum 10" screen with 1800 x 1200 resolution
- Recommended - Quad-core CPU with 8 GB RAM
- Digital camera (rear-facing)

More Information

It is recommended to choose device models with the highest specs and appropriate storage required if large mobile caches or high number of documents and media attachments are expected.

This information will change over time in order to keep the app up to date with security, operating system, and store publishing requirements.

For more information, contact your Trimble Sales Representative or Account Manager.

Installation Instructions

Complete the following steps to install the app from your respective app store.

Apple App Store

1. Open the Apple App Store.
2. Search for Trimble Unity Field.
3. Tap **Install**.
4. Tap **Open**.

Google Play Store

1. Open the Google Play Store.
2. Search for Trimble Unity Field.
3. Tap **Install**.
4. Tap **Open**.

Microsoft Windows

1. Tap the following link: [Link](#)
2. Tap the **Windows** icon.

The app is downloaded to your device.

Configure the Redirect URI

Single Sign-on (SSO) is required to log in to the app. To enable SSO functionality with Trimble Unity Field, you must first configure the redirect URI in your ArcGIS Online (AGOL) or ArcGIS Enterprise Portal environments.

IMPORTANT:

- Without this configuration, you will not be able to log in to the app.
- The redirect URLs must be entered exactly as shown.

1. Navigate to your ArcGIS Online or ArcGIS Enterprise Portal.
2. Tap **My content**.
3. Tap **New item**.
4. Tap **Developer credentials**.
5. Under the **Redirect URLs** section, enter the following redirect URLs based on the device's operating system:
 - Android and iOS: **trimbleunityfield://auth**
 - Windows: **http://localhost:61106/trimbleunityfield**

For more detailed ArcGIS Enterprise Portal configuration instructions, see Esri's [Add and register an app](#) documentation.

For more detailed ArcGIS Online configuration instructions, see Esri's [Add and register an app](#) documentation.

Log In

You can log in to the mobile app using your organization name and user credentials. Your organization determines which Trimble Unity cloud service instance you are connecting to.

If you enter an incorrect password three times within a 15-minute period, your account is temporarily locked and you are prompted to try again after 30 minutes. Administrators can configure both the number of attempts and the lockout duration.

✓ **PREREQUISITES:** Before logging in to the app, ensure that:

- Single Sign-on is configured for your account. If Single Sign-on is not configured, you will not be able to log in to the app. See the [Single Sign-on Guide for Trimble Unity Maintain and Trimble Unity Permit](#) for more information.
 - You must configure the redirect URI in your ArcGIS Online (AGOL) or ArcGIS Enterprise Portal environment in order to use SSO. See "Configure the Redirect URI" on the previous page for more information.
- Your device is connected to the internet.
- You know your organization name and user credentials. If you do not know your organization or need information on how to setup a new account, please contact your administrator

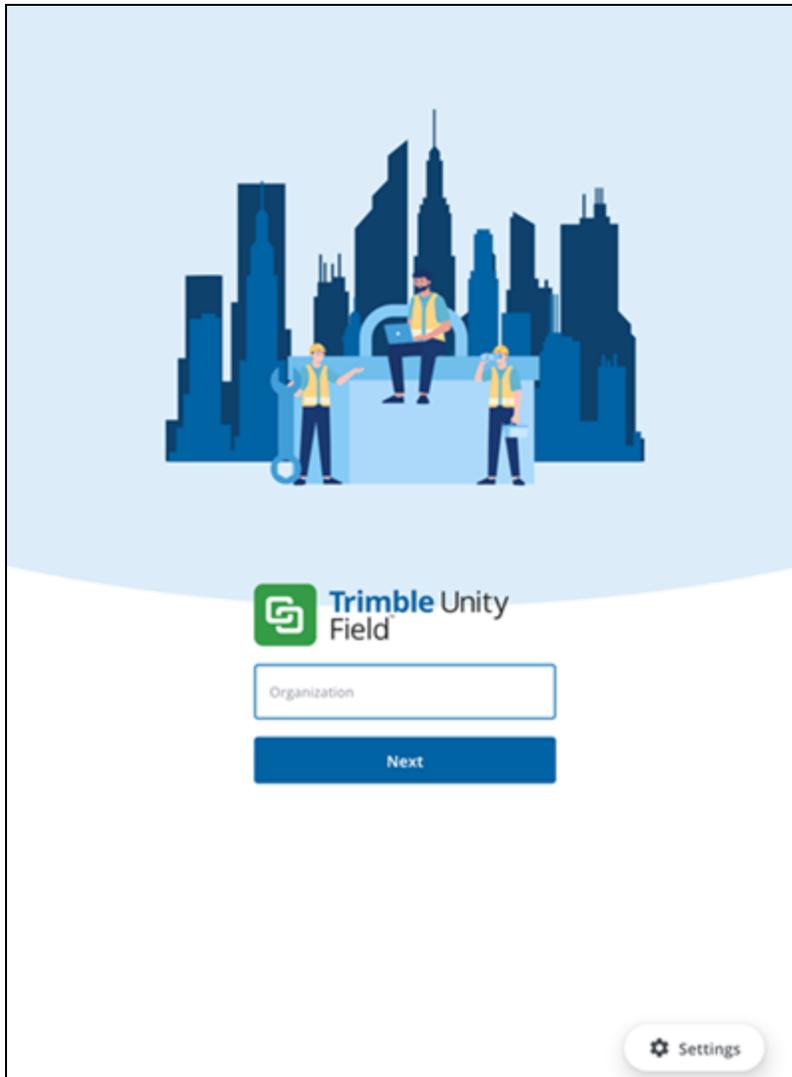
1. Launch the Trimble Unity Field mobile app.

A message appears asking you to allow the Trimble Unity Field app to access your device's location services. Depending on your device, you may be prompted to select your preferred location permissions.

 **IMPORTANT:** To use location-based features, such as capturing a location or collecting GIS feature data, you must enable location permissions for the app. Without these permissions, these features will be unavailable.

2. Enter your **Organization**.

 **NOTE:** The **Organization**, **Username**, and **Password** fields are case sensitive.



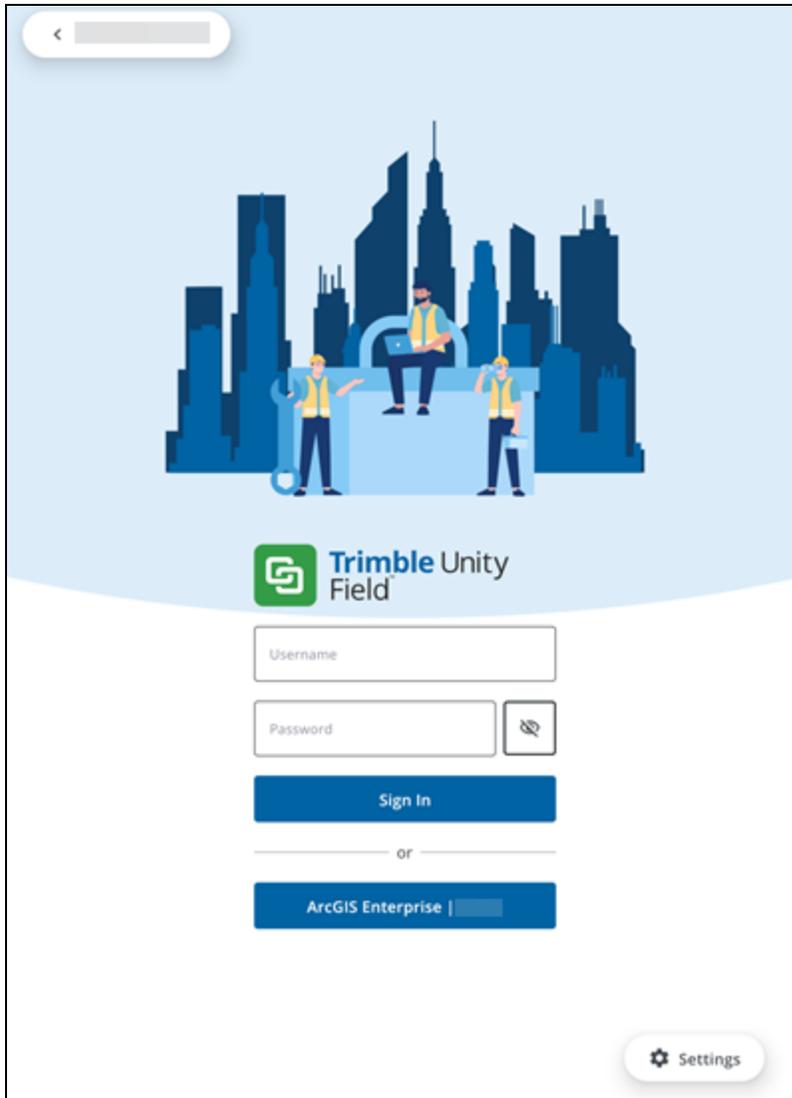
3. Tap **Next**.
4. Tap your SSO option to log in. For example, log in using your ArcGIS Online or Portal for ArcGIS credentials.

 **TIP:**

- Tap the **X** icon in the **Organization**, **Username**, or **Password** field to quickly clear the entered text.
- Tap the **Visibility** icon to toggle the visibility of your password.



5. If prompted, accept any SSO permission requests.
6. Tap **Sign In**.



For Android and iOS users, your device's credential manager may prompt you to save your login information, including biometric data, for access in the future. If accepted, your credentials will automatically fill on subsequent logins, streamlining the login process and improving efficiency for users who switch between multiple organizations.

At the initial log in, the app automatically syncs. The progress panel shows the total number of updates and changes that are being synced.

Access Help Resources

You can access help resources by navigating to the **Settings** screen.

1. Tap **Settings**.
2. Tap **Help Documentation** to access help documentation.

Initial Offline Sync

After logging in, an initial offline sync is performed to download offline activities and GIS data. The GIS data synced is based on pre-configured offline map areas defined by a system administrator for your organization.



PREREQUISITES:

- Offline map areas must be configured in ArcGIS Online in order to utilize web maps when not connected to the internet. For more information on how to define these offline map areas, see Esri's [Take web maps offline](#) documentation. If you experience any issues with your offline map areas, please contact your system administrator.

See "Offline Map Areas" on page 179 for more information.

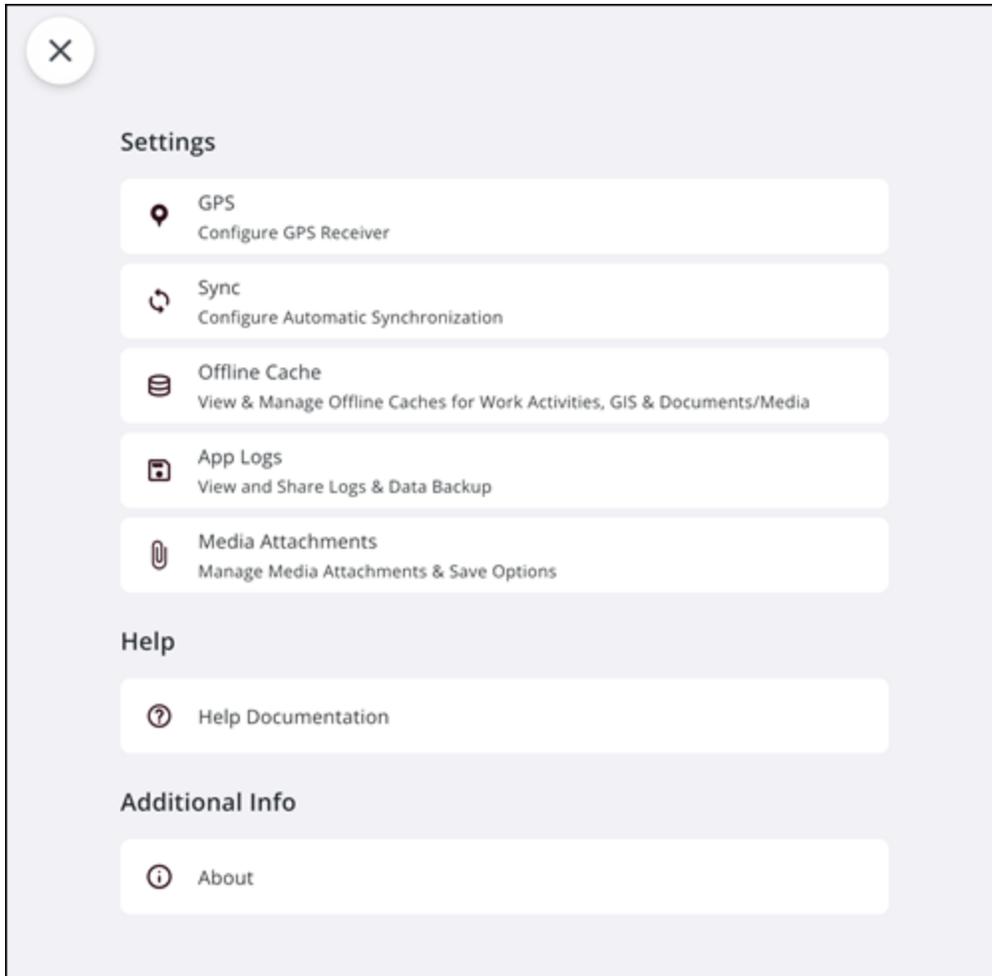
App Settings

You can access the **App Settings** panel before or after logging in to the app.

1. Tap **Settings**.

- **GPS:** Tap to configure and connect to the GNSS receiver.
- **Sync:** Tap to configure automatic syncing. This setting is only available after the initial login to the app.
- **Offline Cache:** Tap to view and manage offline caches for work activities, GIS, and Documents/Media. This setting only appears after logging out of the app.
- **App Logs:** Tap to view and share logs and data backup.
- **Media Attachments:** Tap to manage media attachments and enable photo timestamps.
- **Help Documentation:** Tap to access the help documentation.
- **About:** Tap to view mapping, privacy policy, and version information.
- **Logout:** Tap to log out of the app.

After logging in to the app, additional information appears on the **Settings** panel, including the user's organization, username, **Last sync** details, and a **Logout** option.



Settings

GPS

The following fields appear on the **GPS** panel:

- **Use Metric Units:** Turn on to enable metric units.
- **Trimble Mobile Manager:** Turn on to enable Trimble Mobile Manager's positioning configuration. See "Connect to the GNSS Receiver" on page 26 for more information.
- **Antenna Height:** Tap to adjust antenna height in meters. This option is not available if you have Trimble Mobile Manager enabled.
- **Location Status:** Tap to view the details of your location status.

Sync

These settings are only available after the initial login to the app. The following fields appear on the **Sync** panel:

- **Enable Auto Sync:** This setting is enabled by default. Tap to toggle enabling automatic syncing on or off. When enabled, a timed sync will upload and download changes with the server.
- **Auto Sync on WiFi only:** Turn on to automatically sync only when connected to WiFi (to avoid using cellular data).
- **Download Interval:** Tap the drop-down list to select the frequency of auto sync data download. This setting only applies when the **Enable Auto Sync** setting is enabled.
 - **Reset:** Tap to reset the download interval to the default setting.
 - **X icon:** Tap to exit the panel.
 - **10 Minutes:** Tap to select a ten-minute download interval.
 - **30 Minutes:** Tap to select a thirty-minute download interval.
 - **1 Hour:** Tap to select a one-hour download interval.
 - **Every 4 Hours:** Tap to select a download interval of every four hours.
 - **Every 8 Hours:** Tap to select a download interval of every eight hours.
 - **Daily:** Tap to select a daily download interval.
 - **Manual Download Only:** Tap to only download data manually.
- **Max Upload Frequency:** Tap the drop-down list to select the maximum sync data upload frequency. This setting only applies when the **Enable Auto Sync** setting is enabled.
 - **Reset:** Tap to reset the **Max Upload Frequency** to the default setting.
 - **X icon:** Tap to exit the panel.
 - **10 Minutes:** Tap to select a ten-minute maximum sync data upload frequency.
 - **30 Minutes:** Tap to select a thirty-minute maximum sync data upload frequency.
 - **1 Hour:** Tap to select a one-hour maximum sync data upload frequency.
 - **Every 4 Hours:** Tap to select a maximum sync data upload frequency of every four hours.
 - **Every 8 Hours:** Tap to select a maximum sync data upload frequency of every eight hours.
 - **Daily:** Tap to select a daily maximum sync data upload frequency.
 - **Manual Download Only:** Tap to only download data manually.

Offline Cache

These settings appear only after logging out of the app. The following fields appear on the **Offline Cache** panel:

- **Workflows & Config Data:** Tap **Clear All** to clear all work and configuration data. This will erase all Trimble Unity Field data from your device. Tap **Clear** to confirm.
- **Offline Map Areas:** Tap **Clear All** to clear all map areas. This will erase all the offline map areas from your device. Tap **Clear** to confirm.

App Logs

The following fields appear on the **App Logs** panel:

- **Send App Log Only:** Tap **Send Data** to only send the entire app log file.
- **Send App Log with Database Backup:** Tap **Send Data** to send the app log file with the database backup.
- **Clear Logs:** Tap **Clear Data** to delete the existing logs on the device.
- **Clear Backups:** Tap **Clear Data** to delete the existing backups on the device.

Media Attachments

The following field appears on the **Media Attachments** panel:

- **Enable Photo Timestamp:** This is enabled by default and ensures photos taken in the field display a text-based timestamp directly on the image. Tap to turn this setting off.

Help

- **Help Documentation:** Tap to access help documentation resources.

Additional Info

About

The following fields appear on the **About** panel:

- **Mapping:** Tap to view the mapping API provided by Esri ArcGIS Runtime SDK.
- **Privacy Policy:** Tap to view the privacy policy.
- **Version:** Tap to view app version information.

Logout

- **Logout:** Tap to log out of the app. This only appears after you are logged in.

Connect to the GNSS Receiver

Trimble Unity Field supports integrated receivers in iOS, Android, and Windows devices. To receive high accuracy position data when using Trimble Unity Field, connecting to an external

Global Navigation Satellite System (GNSS) receiver is required. This connection is configured outside of the Trimble Unity Field app using Trimble Mobile Manager.

Configuring the Connection in Trimble Mobile Manager

You must first configure the connection in Trimble Mobile Manager.

1. Configure the connection in Trimble Mobile Manager. See the [Trimble Mobile Manager Help Portal](#) website or contact your system administrator for more information on how to configure a receiver.

IMPORTANT:

Trimble Unity Field requires positions to be in a **WGS84 (current)** coordinate system. To ensure the most accurate feature and data collection in the app, the GNSS Output configuration in Trimble Mobile Manager must be defined as follows:

1. Under **Configuration**, tap the **Output** drop-down list and select **Select from list**.
2. In the **GNSS** output drop-down list, select **WGS84 (current)**. This is the minimum requirement.



The screenshot shows two dropdown menus. The first is labeled 'Output' and has 'Select from list' selected. The second is labeled 'GNSS output' and has 'WGS84 (current)' selected.

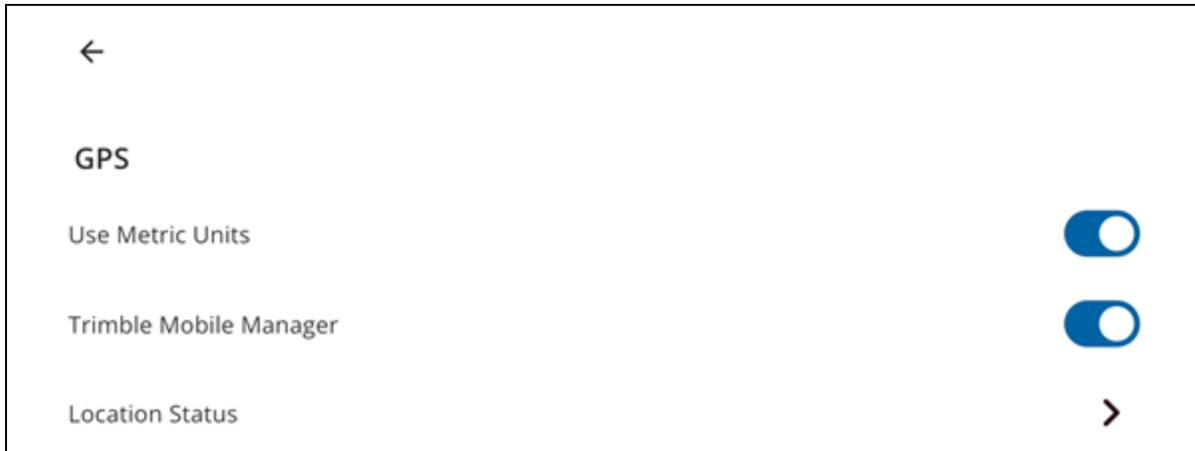
2. If needed, configure real-time corrections. See [Configure real-time corrections](#) on the Trimble Mobile Manager Help Portal website for more information.

Configuring the Connection in Trimble Unity Field

Once you are connected to the GNSS receiver through Trimble Mobile Manager, complete the following to enable the GNSS receiver within the app.

1. Tap **Settings**.
2. Tap **GPS**.
3. Tap to turn on the **Trimble Mobile Manager** switch.

Trimble Mobile Manager is enabled and the GNSS receiver is connected.



4. To confirm the GNSS receiver is connected, tap **Location Status**. From here, you can also view more details and position metadata. From here, you can view the following details and position metadata:

- **Receiver:** The type and model of the connected GNSS receiver.
- **Battery:** The current battery level of the GNSS receiver.
- **Number of Satellites:** The number of satellites currently being used to determine your position.
- **Position:** Displays details about position metadata.
 - **Fix Type:** The type of position solution calculated by the receiver.
 - **Latitude:** Your current latitude coordinate.
 - **Longitude:** Your current longitude coordinate.
 - **Height above Ellipsoid:** Your height above the reference ellipsoid.
 - **Altitude (MSL):** Your altitude above mean sea level (MSL).
 - **Antenna Height:** The height of the GNSS receiver's antenna above the ground.
 - **Vertical Accuracy:** The estimated accuracy of the vertical component of your position.
 - **Horizontal Accuracy:** The estimated accuracy of the horizontal components of your position.
 - **Tilt Compensated Position:** Indicates whether the position has been corrected for the tilt of the GNSS receiver's antenna. This feature, which relies on TIP™ technology (Trimble Inertial Platform™ technology) ensures accurate measurements even if the receiver is not perfectly upright.
 - **Tilt:** The current tilt angle of the GNSS receiver's antenna.
 - **Tilt X:** The tilt angle of the antenna along the X-axis.
 - **Tilt Y:** The tilt angle of the antenna along the Y-axis.
- **Real Time Correction Status:** Displays the status of any real-time correction services being used to enhance position accuracy.
 - **RTK Status:** The status of the Real Time Kinematic (RTK) positioning solution.
 - **Correction Age:** The age of the last received correction data, if applicable.

Navigating Trimble Unity Field

Trimble Unity Field has a user-friendly interface designed to allow field users to access information and perform actions quickly and efficiently.

Top Navigation Menu

The Top Navigation menu allows users to perform searches, select work activity types, and access more actions.

- **Activity Types:** Tap to select which work activity type to view in the work activity list.
 - **Search** icon: Tap to search for a work activity type.
 - **Inspections:** Tap to view inspections in the work activity list.
 - **Work Orders:** Tap to view work orders in the work activity list.
 - **Service Requests:** Tap to view service requests in the work activity list.
 - **Cases:** Tap to view cases in the work activity list.
 - **Case Tasks:** Tap to view case tasks in the work activity list.
 - **Case Violations:** Tap to view case violations in the work activity list.
- **Search** icon: Tap to search work activities using summary card display fields.
 - **Barcode Scanner** icon: Tap to open the barcode scanner. See "Search GIS Features Using the Barcode Scanner" on page 191 for more information.
 - **Activities** list: Tap to search the work activities list. See for more information.
 - **Assets** list: Tap to search for assets. See "Search For Assets" on page 90 for more information.
- **Sync** icon: Tap to perform a manual sync.
 - **X** icon: Tap to cancel an in progress sync.
 - **Trigger Sync:** Tap to perform a sync.
 - **Offline Map Areas:** Tap to open the **Offline Map Areas** menu. See "Offline Map Areas" on page 179 for more information.
 - **Cancel:** Tap to close the menu.



Bottom Navigation Menu

The bottom navigation menu allows users to access the **Activities** and **Settings** pages.

- **Activities:** Tap to access the top navigation menu, work activity list, filters, and map.
- **Settings:** Tap to access **Settings** and log out.



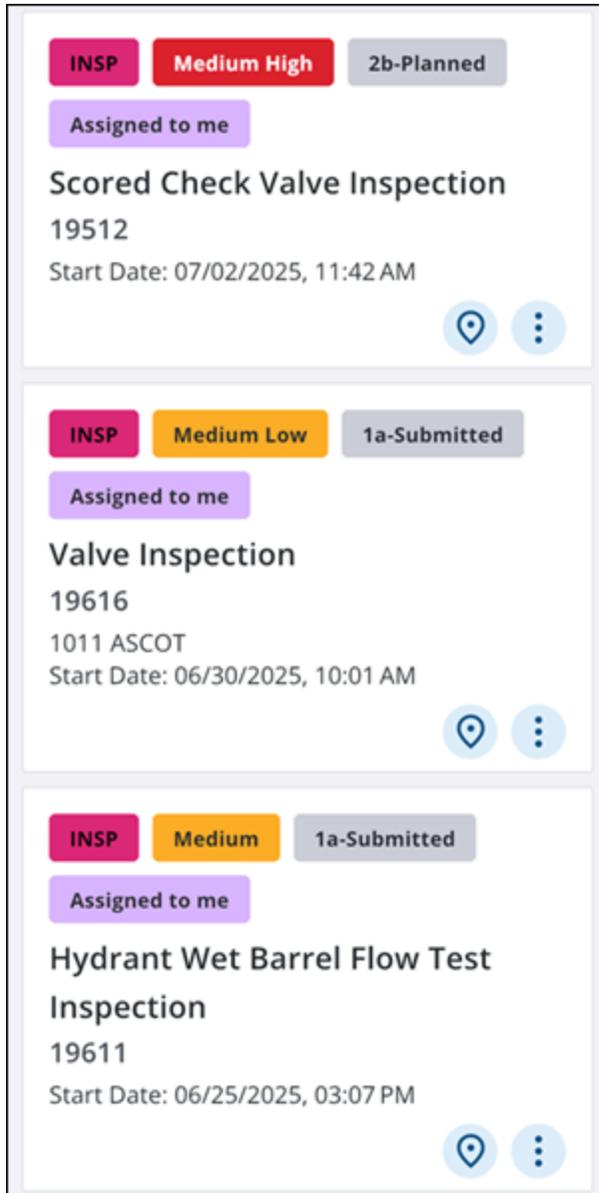
Activities

The Activities page displays the work activity list, filters, and map.

Work Activity List

Work activities are displayed as summary cards in the work activity list. Summary cards display information about the work activity, such as priority, status, start date, projected complete date, and work activity number. For activities assigned to you, a label indicating **Assigned to me** appears. You can search for work activities using these display fields.

- **Summary card:** Tap to open a work activity.
- **Map icon:** Tap to view the work activity on the map. The map zooms to the highlighted work activity pin and the activity card is shown.
- **More icon:** Tap the three dots to access more actions for the work activity.
 - **Directions:** Tap to get directions to the work activity.
 - **Sync:** Tap to perform a sync.
 - **Create Related Activity:** Tap to create a related work activity. To create cases in the app, you must first review and complete all prerequisites. See "Cases" on page 71 for more information.
 - **Locate:** Tap to locate the work activity. See "Show Distance and Bearing and My Location On Maps" on page 194 for more information.
 - **Web:** Tap to open the work activity in the web application. See "Open In Web" on page 125 for more information.

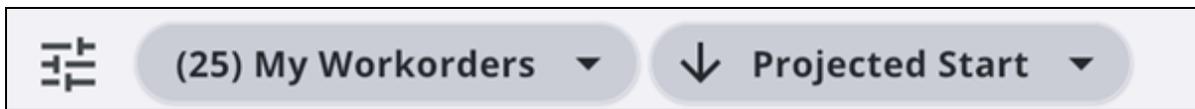


Filters

You can sort and filter your selected work activity list based on **All Filters**, **Saved Filters**, or **Sort By** filters. See "Sort And Filter Work Activities" on page 50 for more information.

- **All Filters** icon: Tap to filter by work activity status, priority, template, description, projected start date, or projected complete date. These filters may vary depending on the selected work activity list. Tap **Reset All** to reset all the filters.
- **Saved Filters**: Tap to download and select saved filters to apply or to manage saved filters.
 - **Download** icon: Tap to download a saved filter to your device.

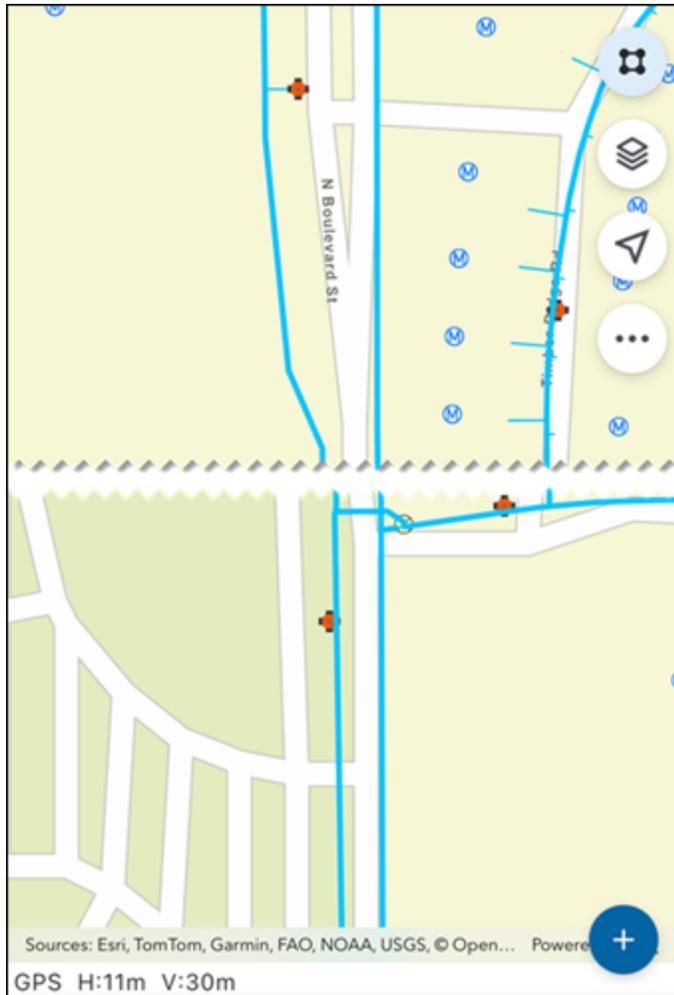
- **Apply:** Tap to apply the current selected saved filter.
- **Manage:** Tap to manage saved filters.
 - **Clear Work Activities:** Tap to clear the selected work activities.
- **Sort By:** Tap to select a filter to sort the work activity list in ascending or descending order by projected start, status, or priority depending on the selected work activity type. An up arrow filters ascending to descending, while the down arrow filters descending to ascending.
 - **Projected Start:** Tap to sort by the work activity projected start date.
 - **Status:** Tap to sort by the work activity status.
 - **Priority:** Tap to sort by the work activity priority.
 - **Done:** Tap to save your selected filter.
 - **Reset:** Tap to reset the selected filter.



Map

The map allows users to view and interact with GIS data in real-time in reference to their current location in the field. When opened, the map zooms to display all work activities.

- **Select icon:** Tap to use the select tool to select assets and features on the map.
- **Layers:** Tap to access all available layers on the map.
 - **Search icon:** Tap to search for a layer.
 - **Visibility icon:** Tap to turn on/off the visibility of a layer.
 - **Check mark icon:** Tap to select a layer.
- **Current Location icon:** Tap to zoom to your current location on the map and switch between different pan modes. See "View My Location on the Map" on page 174 for more information.
- **More Actions icon:** Tap to access the **More Actions** map menu.
 - **Web Map:** Tap to view available web maps.
 - **Offline Map Areas:** Tap to view and download offline map areas.
 - **Base Maps:** Tap to view and edit base maps using the **Base Maps Selection Tool**.
 - **Legend:** Tap to view the map legend.
 - **Cancel:** Tap to exit the menu.
- **Add icon:** Tap to add **Assets, Inspections, Work Orders, Service Requests,** or **Cases** to create a work activity or asset.



Settings

You can access the Settings page after logging in to the app. See "App Settings" on page 23 for more information.

- **GPS:** Tap to configure the GPS Receiver.
- **Sync:** Tap to configure automatic syncing. This setting is only available after the initial login to the app.
- **Offline Cache:** Tap to view and manage offline caches for work activities, GIS, and Documents/ Media. This setting only appears after logging out of the app.
- **App Logs:** Tap to view and share logs and data backup.
- **Media Attachments:** Tap to manage media attachments and enable photo timestamps.
- **Help Documentation:** Tap to access the help documentation.
- **About:** Tap to view additional information.
- **Logout:** Tap to log out of the app.

Work Activity Details

To access the work activity details screen, tap a work activity. Different fields may display depending on the work activity type. See "View Work Activity Details" on page 55 and "Activity Types" on page 58 for more information.

Work Activity Actions

- **Save:** Tap to save the work activity.
- **Back icon:** Tap to exit the work activity.

Quick Actions Menu

- **Zoom:** Tap to zoom to the work activity on the map.
- **Directions:** Tap to get directions to the work activity.
- **Attach:** Tap to add an attachment to the work activity.
- **Sync:** Tap to perform a sync.
- **More:** Tap to access more actions.
 - **Create Related Activity:** Tap to create a related work activity. This action is only available for work orders, service requests, and inspections.
 - **Locate:** Tap to utilize advanced locate for the work activity using GPS.
 - **Web:** Tap to open the work activity in the web application.

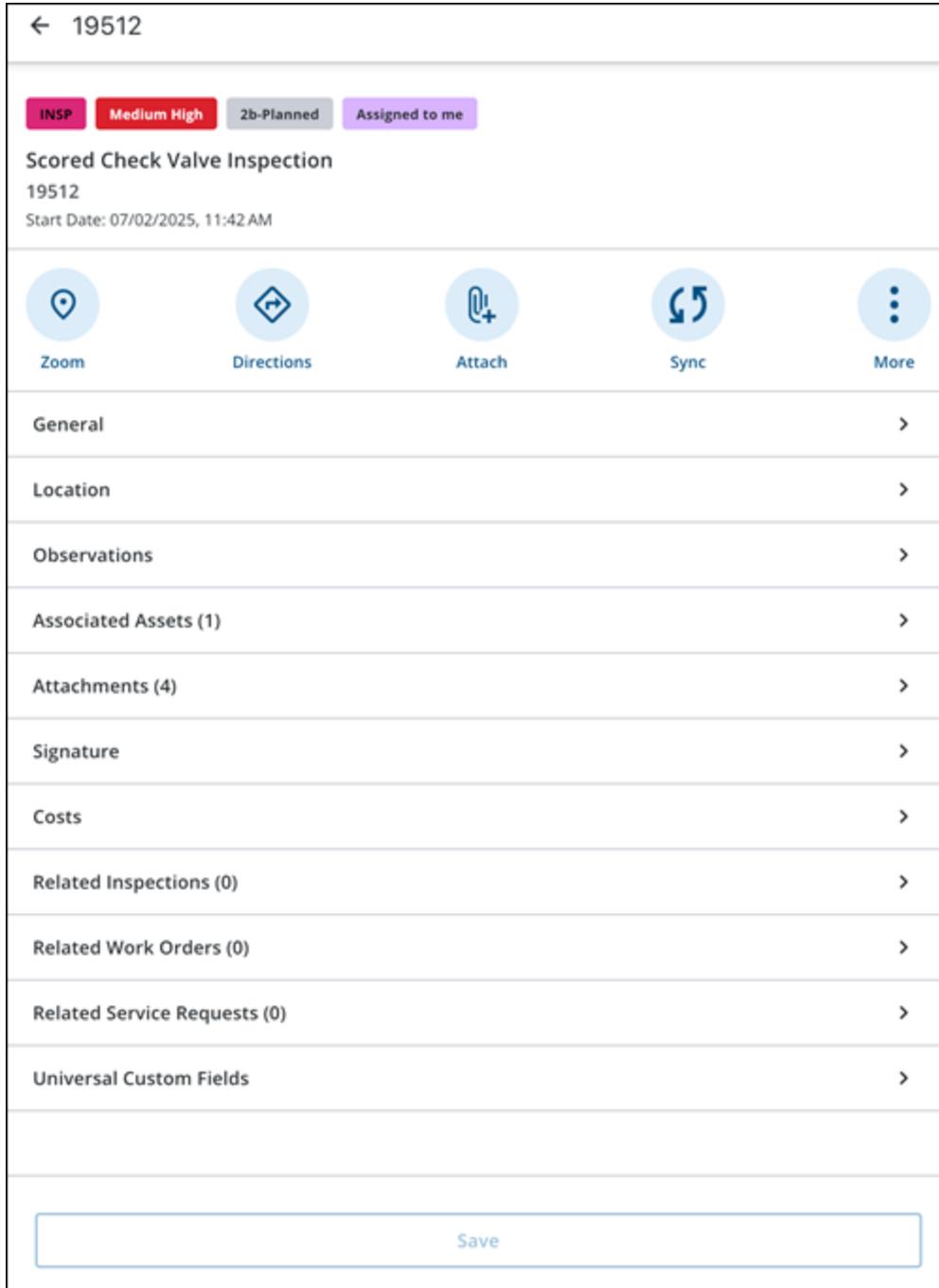
Work Activity Pages

Work activity pages display work activity fields.

Depending on your configuration settings, different work activity fields may appear than are displayed in this list.

- **General:** Tap to view and edit general information for the work activity.
- **Location:** Tap to view and edit location information for the work activity.
- **Observations:** Tap to view observation information for the work activity.
- **Associated Assets:** Tap to view and edit assets associated with the work activity. The number in parentheses indicates the number of associated assets.
- **Attachments:** Tap to view, edit, and add attachments to the work activity. The number in parentheses indicates the number of attachments.
- **Costs:** Tap to view and edit costs related to the work activity.
- **Related Inspections:** Tap to view or create a related inspection. The number in parentheses indicates the number of related inspections.
- **Related Work Orders:** Tap to view or create a related work order. The number in parentheses indicates the number of related work orders.

- **Related Service Requests:** Tap to view or create a related service request. The number in parentheses indicates the number of related service requests.
- **Universal Custom Fields:** Tap to view and edit universal custom field information for the work activity. These fields only display if configured.



When a work activity page is open, you can navigate between pages using one of the following actions:

- **Next** arrow: Tap to navigate to the next page.
- **Back** arrow: Tap to navigate to the previous page.
- **Menu** icon: Tap to view the list of pages. Tap a page to navigate to it.
- **Swipe left and right**: Swipe left or right on the screen with a finger to navigate between pages.
- **Done**: Tap to exit the page and return to the work activity details page.

The screenshot shows a mobile application form titled "Valve Accessibility". At the top left, there is a close button (X) and the title. The form contains several sections:

- Is Valve Accessible? ***: Two radio buttons, "Yes" (selected) and "No".
- Surface Type**: A dropdown menu with "-- Please Select --" as the current selection.
- Is Traffic Control Needed?**: Two radio buttons, "Yes" and "No".
- Traffic Control Methods**: A dropdown menu with "-- Please Select --" as the current selection.
- Well/Chamber Cleaned?**: Two radio buttons, "Yes" and "No".
- Additional Accessibility Comments**: A large empty text input field.

At the bottom right of the form area, there are three circular navigation icons: a left arrow, a right arrow, and a menu icon (three horizontal lines). Below the form area, there is a status bar showing "GPS" and "H:35m V:7m". At the very bottom, there is a dark grey bar with the word "Done" in white text.

Log Out

You will remain logged in to the app until you manually log out.

 **BEST PRACTICE:** Before logging out, ensure you have a stable internet connection. This allows the app to properly clear your session data and prevents potential issues with future logins.

1. Tap **Settings**.
2. Tap **Logout**.
3. A confirmation message appears.
 - If you are connected to the internet, a confirmation message appears informing you that if you log out, internet access will be required to log in the next time.
 - If you are not connected to the internet, the message warns you that your session cannot be cleared on logout and internet access will be required for the next login. This means that user data may remain on your device even after logging out.
4. Tap **Confirm** to log out.

You are logged out of the app.

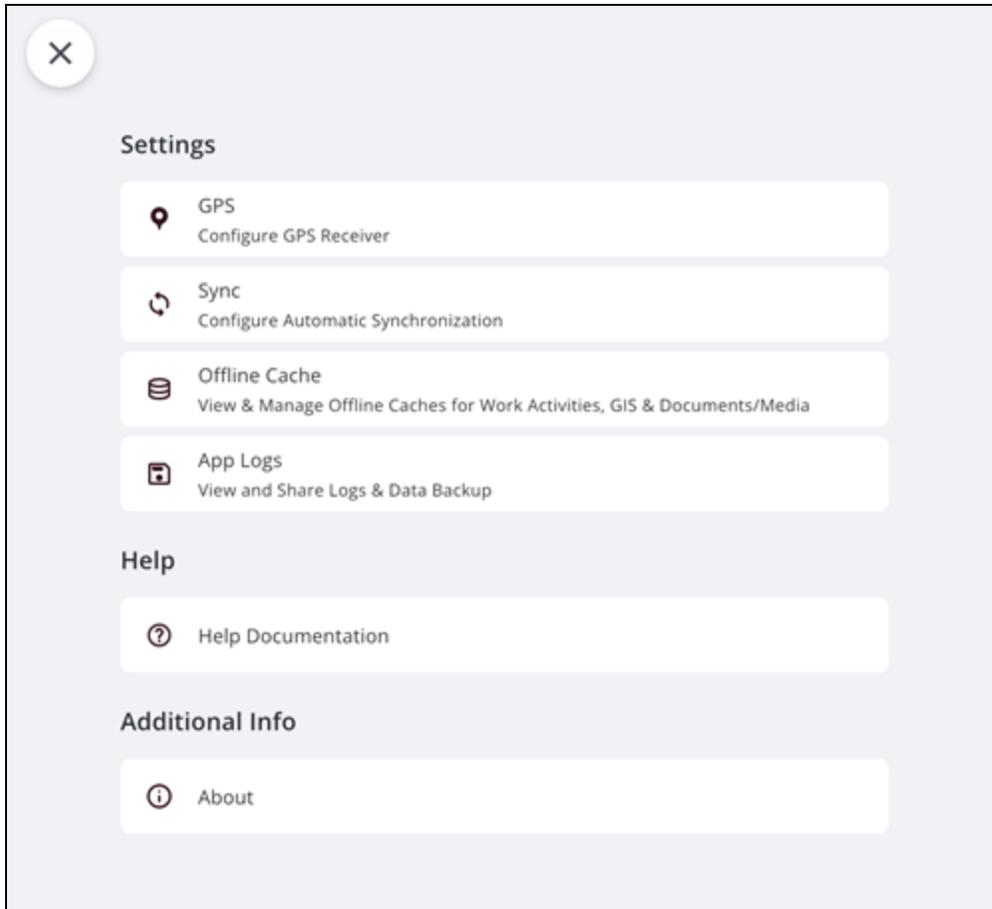
Clear the Offline Map Cache

Clearing the offline map area cache can resolve map display or performance issues.

1. Tap **Settings**.
2. Tap **Logout**.

A confirmation message appears to inform you that if you log out, internet access will be required to log in the next time.

3. Tap **Confirm** to log out.
4. Tap **Settings**.
5. Tap **Offline Cache**.



6. Next to **Offline Map Areas**, tap **Clear All** to clear all map areas.



A confirmation message appears to inform you that this will erase all the offline map areas from your device.

7. Tap **Clear** to confirm.

The offline map cache is cleared.

8. Tap the **Back** icon to return to the **Settings** page.

9. Tap the **X** icon to return to the log in page.

10. Log in to the app again. See "Log In" on page 18 for more information.

Work Activities

You can view, edit, and create asset-based and location-based work orders, service requests, inspections and cases while online or offline.



 **IMPORTANT:**

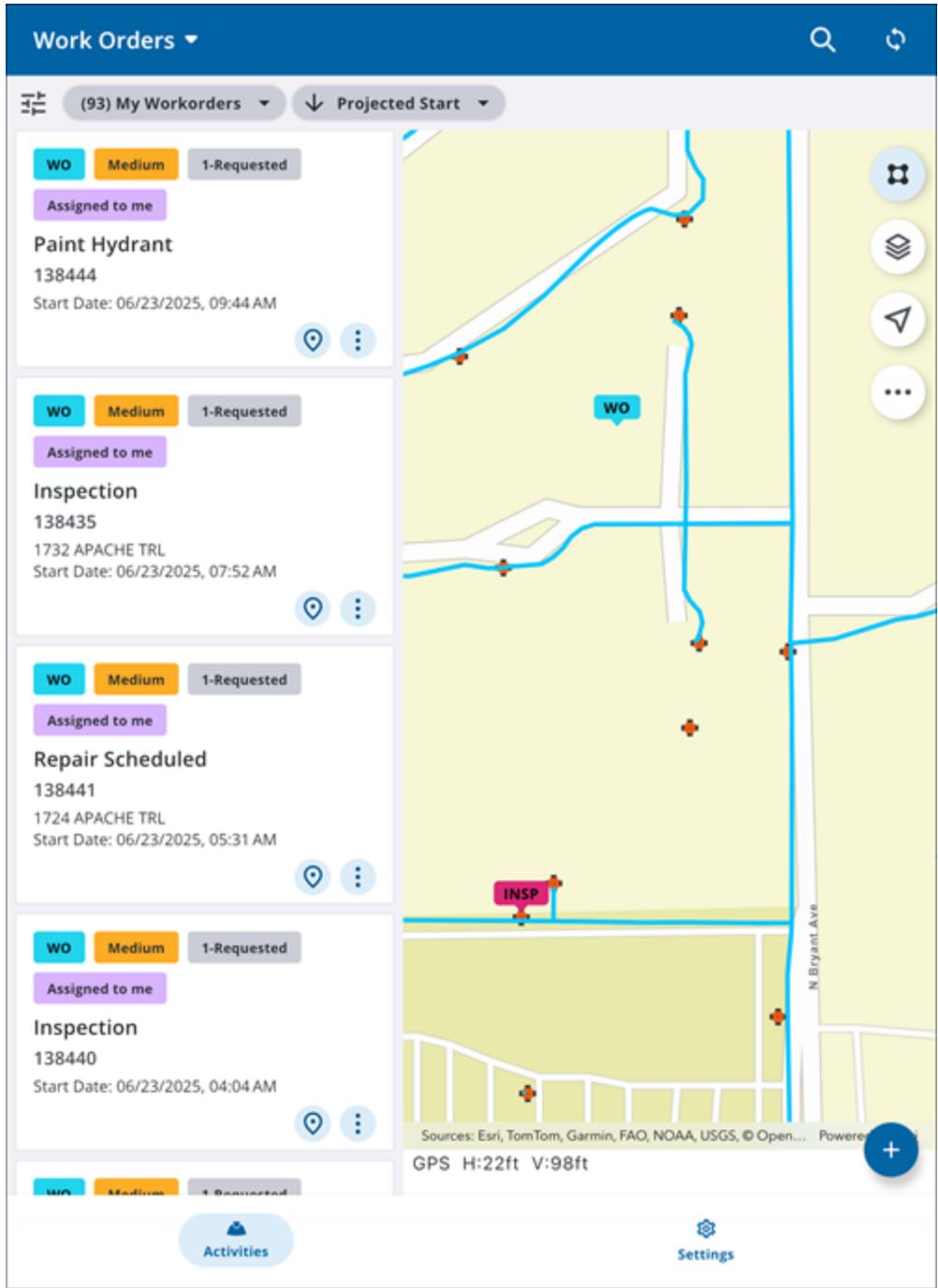
- To access Permit functionality in the app (cases, case violations, case tasks), you must first review and complete all prerequisites. See "Cases" on page 71 for more information.
- Service request templates with questions and answers that predetermine default fields are not currently supported.

Work activities are visible as icons on the map or in the activity list as summary cards.

When a work activity is created, you can perform various activities such as assigning the work activity, collecting data, adding costs, uploading attachments, progressing workflows, and linking other work activities.

View and Manage Work Activities

You can view and manage work activities from the **Activities** screen.



View Work Activity Lists and Summary Cards

You can view work activity lists and summary cards.

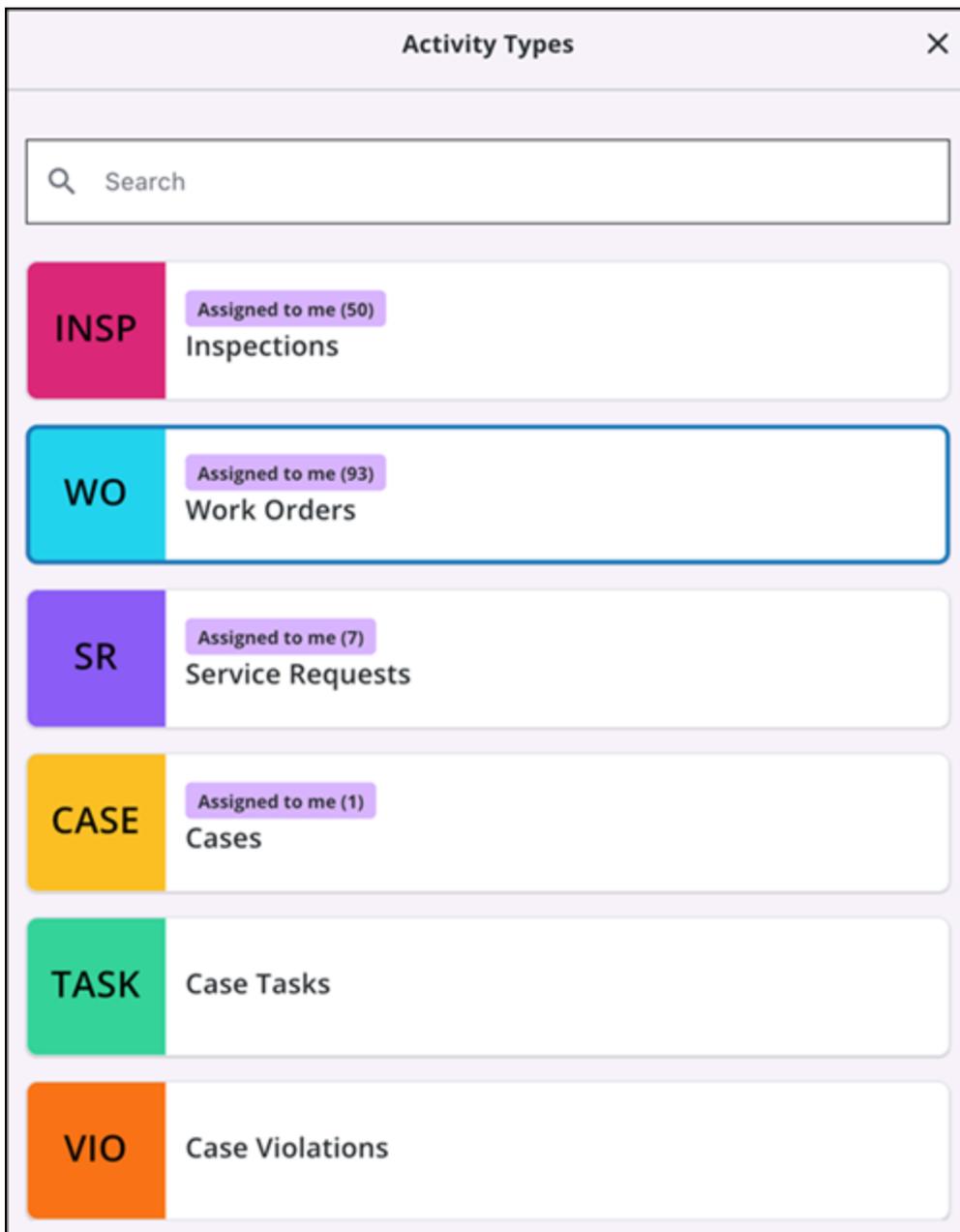
Work Activity Lists

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. To change the work activity type displayed in the work activity list, tap the **Activity Type** on the Top Navigation menu.



The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.



2. Tap or search for your desired work activity type.

The work activity list updates to your selected work activity type.

 **NOTE:** The selected work activity type determines which activities you can create or search. For example, selecting the **Service Requests** work activity type allows you to create new service requests and search existing ones.

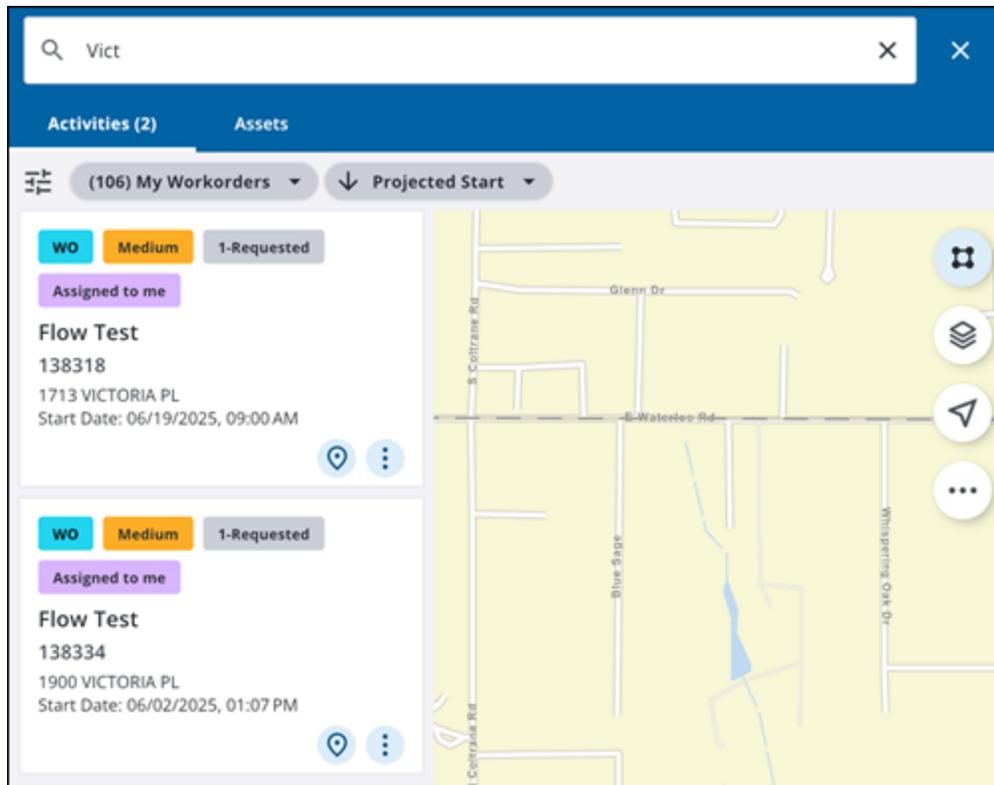
Summary Cards

Work activities are displayed as summary cards, which display the following information:

- Priority
- Status
- **Assigned to me** label
- Address
- Case Number (Cases only)
- Tag (Cases only)
- Start Date
- Projected Complete Date (Service Requests only)
- Work Activity Number

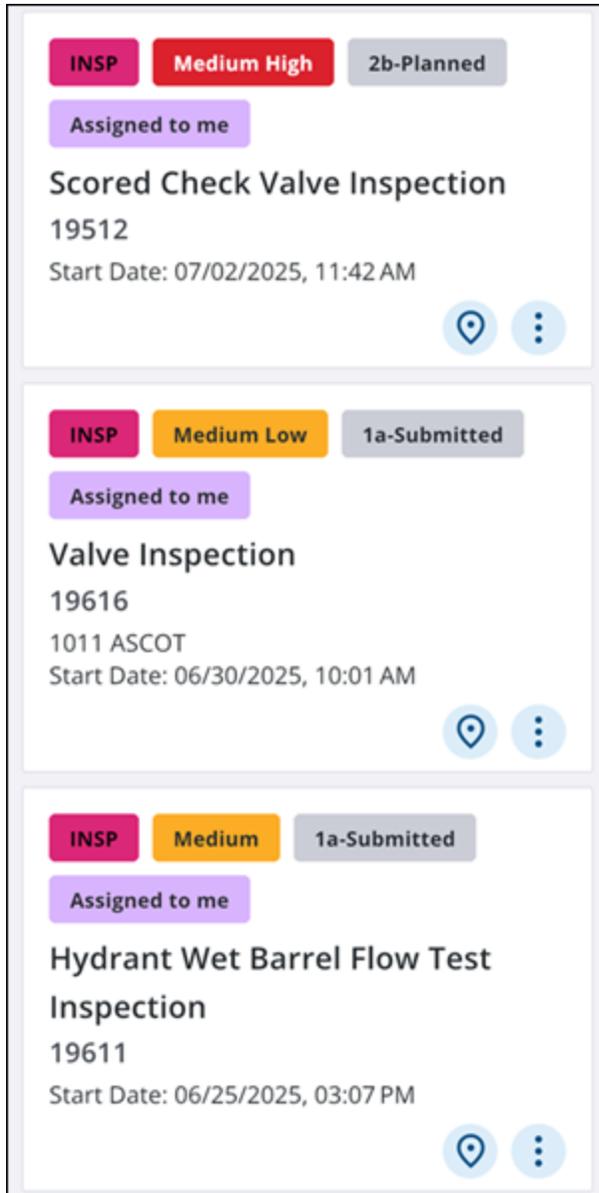
You can search for a work activity by tapping the **Search** icon on the top navigation menu and searching for any of the summary display field details. See "Search for Work Activities" on page 49 for more information.

Results appear under the **Activities** list. When loading more workflow items, Trimble Unity Field shows a loading indicator.



You can access the following actions from a summary card:

- **Summary Card:** Tap to open the work activity and view work activity details.
- **Map icon:** Tap to view the work activity on the map. The map zooms to the highlighted work activity pin and the activity card is shown.
- **More icon:** Tap the three dots to access more actions for the work activity.
 - **Directions:** Tap to get directions to the work activity.
 - **Sync:** Tap to perform a sync.
 - **Create Related Activity:** Tap to create a related work activity. This action is only available for work orders, service requests, and inspections.
 - **Locate:** Tap to locate the work activity. See "Show Distance and Bearing and My Location On Maps" on page 194 for more information.
 - **Web:** Tap to open the work activity in the web application. See "Open In Web" on page 125 for more information.



View and Select Work Activities on the Map

You can select activities from the map by drawing a rectangle using the **Select** icon or by tapping on the map.

If your selection contains both work activities and assets, the **Choose a Type** panel appears.

- **Assets:** Tap to view selected assets.
- **Activities:** Tap to view selected work activities.

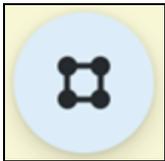
Choose a Type		×
Assets (84)		>
Activities (1)		>

 **NOTE:** You can choose which layers and work activities on the map are selectable. See "Toggle the Visibility and Selection of Layers" on page 173 for more information.

From the Map

Work activities appear as icons on the map that you can view and select.

1. On the map, tap the **Select** icon.

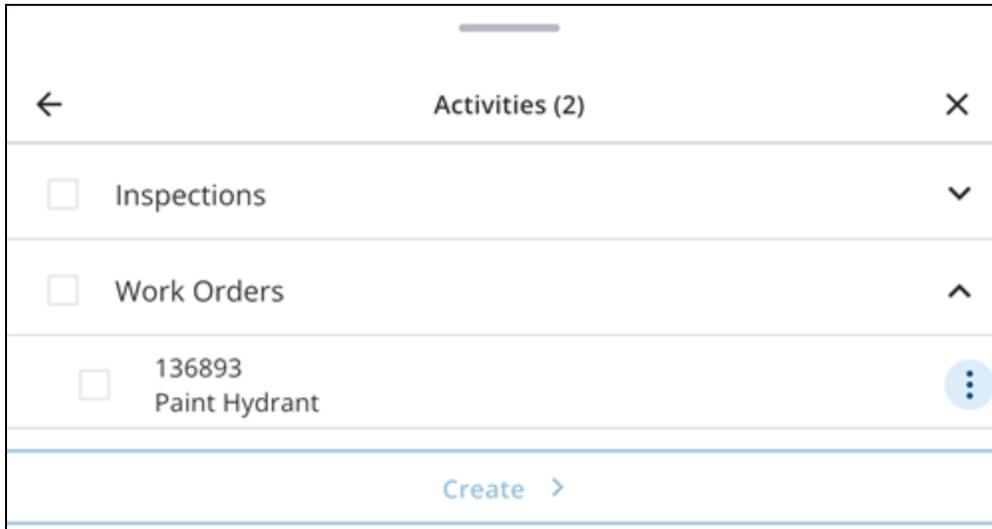


2. Draw a rectangle over the **Work Activity** icon.



 **NOTE:** You can also tap on a work activity icon to select it.

3. From the list of available assets and activities, tap **Activities**.
4. On the **Activities** panel, tap the desired work activity type. For example, tap **Work Orders** to view the selected work orders.



5. Tap a work activity.

The work activity details screen opens.

From a Summary Card

You can view and select a work activity from a summary card. See "View Work Activity Lists and Summary Cards" on page 41 for more information.

1. On a summary card, tap the **Map** icon.

The **Work Activity** icon is highlighted on the map.

From a Work Activity

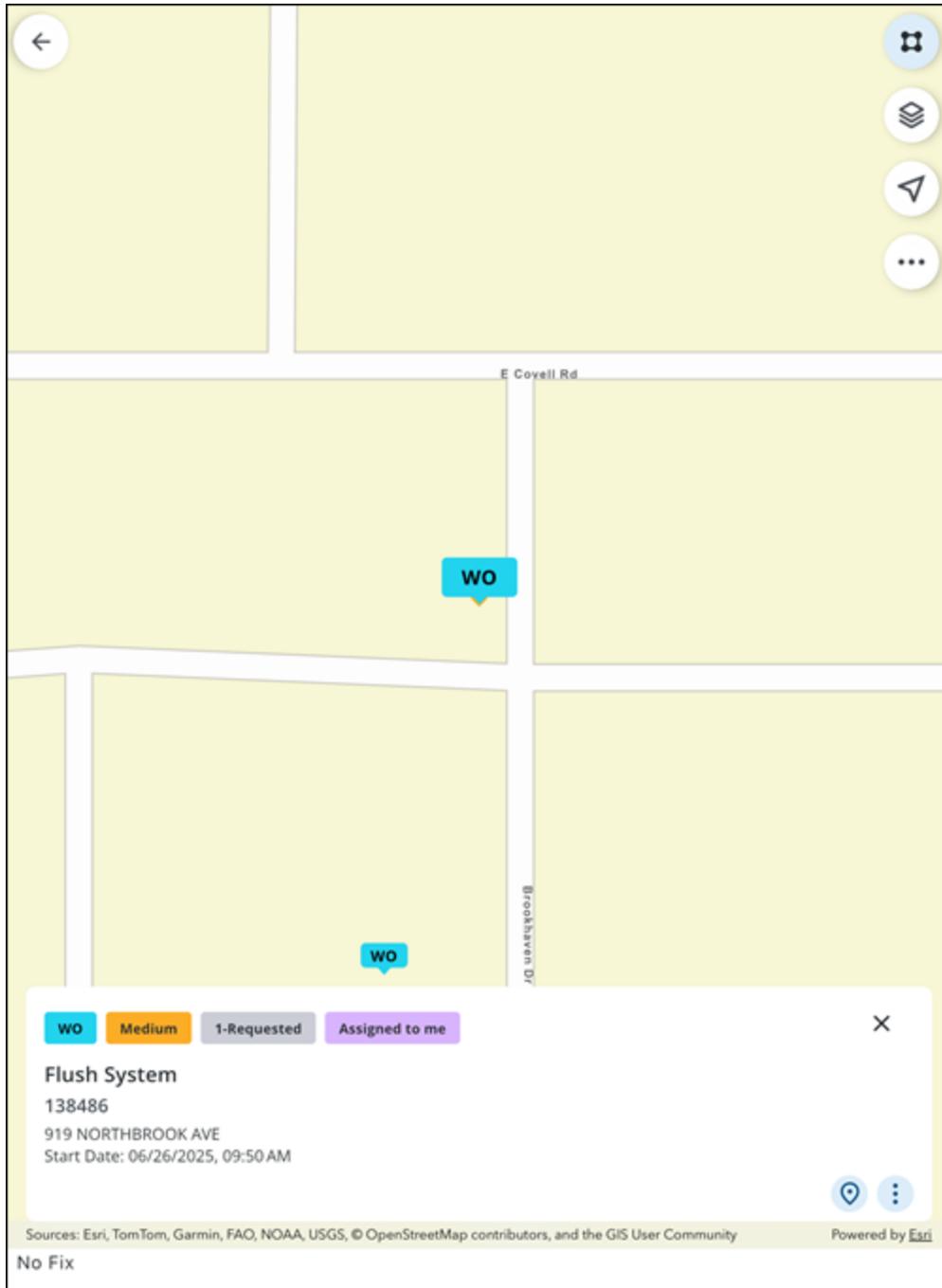
You can open a work activity from the work activity details screen. See "View Work Activity Details" on page 55 for more information.

1. Open a work activity.

2. Tap **Zoom** to zoom to the selected work activity.

The map opens and the work activity pin is highlighted, along with any associated assets or related work activities.

- **Work Activity Card:** Tap to return to the work activity details screen.
- **Map** icon: Tap to view the work activity on the map.
- **More:** Tap to access more actions.
 - **Directions:** Tap to open driving directions to the work activity.
 - **Attach:** Tap to add an attachment to the work activity.
 - **Create Related Activity:** Tap to create a related work activity. This action is only available for work orders, service requests, and inspections.



Search for Work Activities

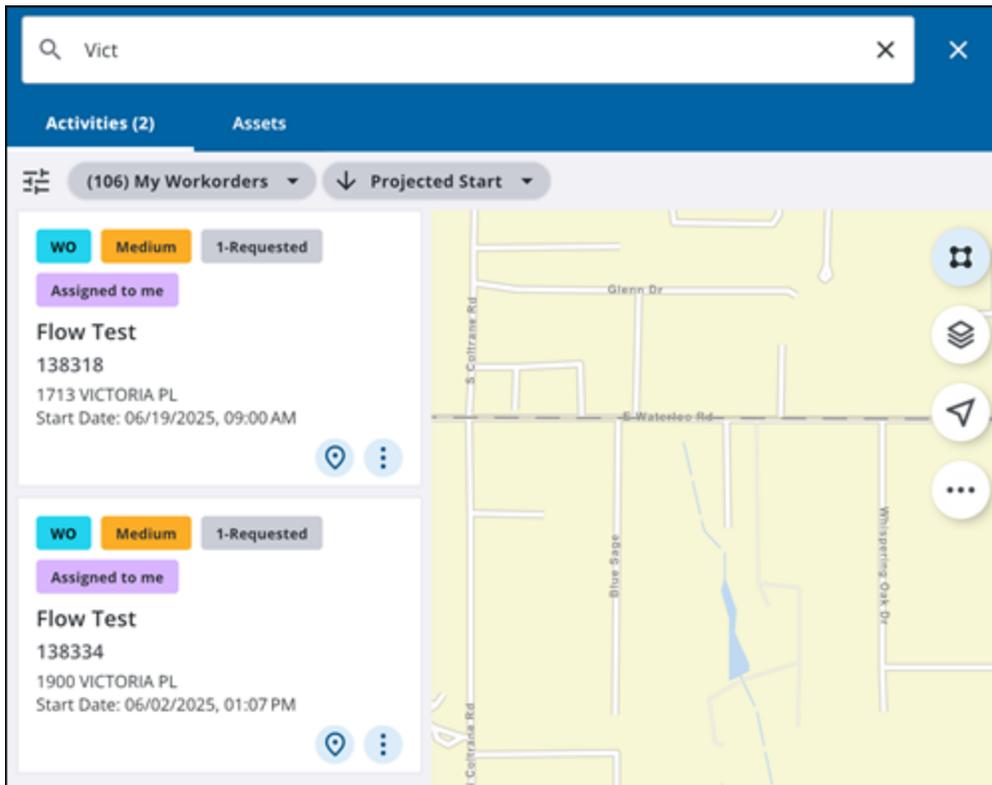
You can search for work activities using summary card display field information.

NOTE: The selected work activity type determines which activities you can create or search. For example, selecting the **Service Requests** work activity type allows you to create new service requests and search existing ones. See "View Work Activity Lists and Summary Cards" on page 41 for more information.

1. On the top toolbar, tap the **Search** icon.



2. Tap the **Activities** list.
3. Enter in the summary card display field information. For example, search **High** to return work activities with a **High** priority status. When loading more workflow items, Trimble Unity Field shows a loading indicator.



4. Select the desired work activity that appears in the **Activities** list.

Sort And Filter Work Activities

You can sort and filter your selected work activity list based on **All Filters**, **Saved Filters**, or **Sort By** filters.

When loading more workflow items, Trimble Unity Field shows a loading indicator.

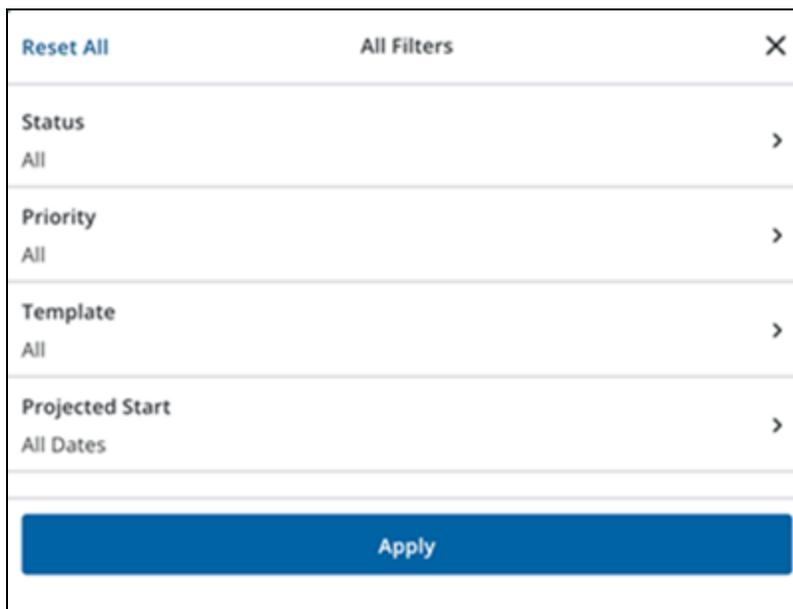
All Filters

The **All Filters** panel allows you to filter the work activity list by **Status**, **Priority**, **Template**, **Description**, and **Projected Start/ Complete**. These filters may vary depending on the selected work activity list. The selected filters remain on the work activity list until cleared.

1. Tap the **All Filters** icon.



The **All Filters** panel appears.

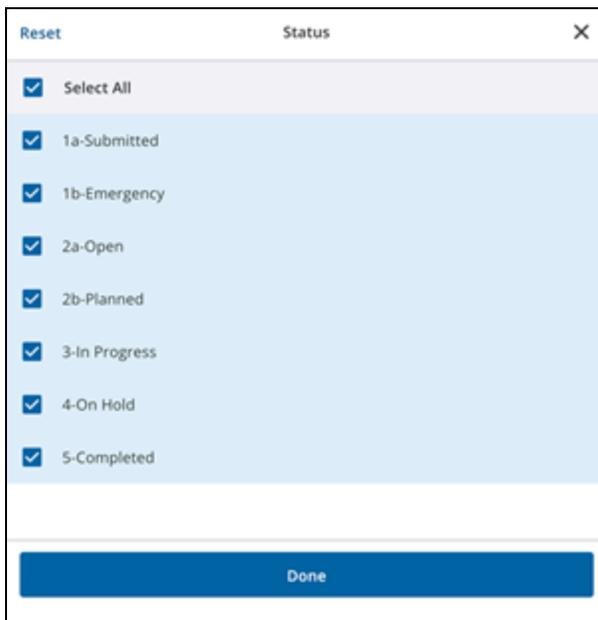


2. Tap a filter.
3. Select or enter filter fields as desired.
4. Tap **Done**.
5. Tap **Apply**.

The work activity list is filtered. You can tap the summary card for any work activity to see the work activity details.

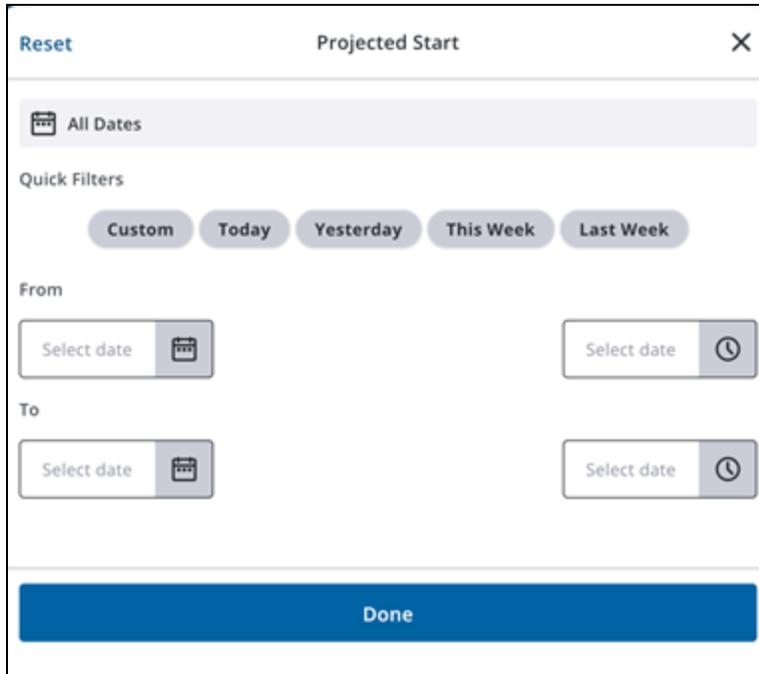
Status, Priority, Template, Description Filters

1. Tap **Status**, **Priority**, **Template**, or **Description**.
2. Select the **Check box** icon besides the desired fields.
3. Tap **Done**.
4. Tap **Apply**.



Projected Start and Projected Complete Filters

1. Tap **Projected Start** or **Projected Complete**.
2. Tap a **Quick Filters** option to quickly filter by a set amount of time. For example, the **Projected Complete** quick filter **This Week** filters the activity list by work activities projected to complete this week.
3. To select a **From** date, tap the **Calendar** icon to select a date from the **Select date** panel. Tap **Confirm**.
4. To select a **From** time, tap the **Clock** icon to select a time from the **Select time** panel. Tap **Confirm**.
5. To select a **To** date, tap the **Calendar** icon to select a date from the **Select date** panel. Tap **Confirm**.
6. To select a **To** time, tap the **Clock** icon to select a time from the **Select time** panel. Tap **Confirm**.
7. Tap **Done**.
8. Tap **Apply**.



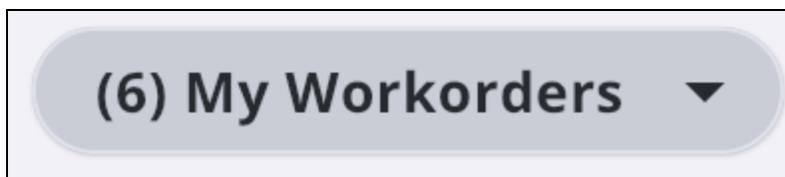
Saved Filters

You can download, manage, and apply saved filters in the app to sort work activities. The app remembers your selected saved filter for each activity type.

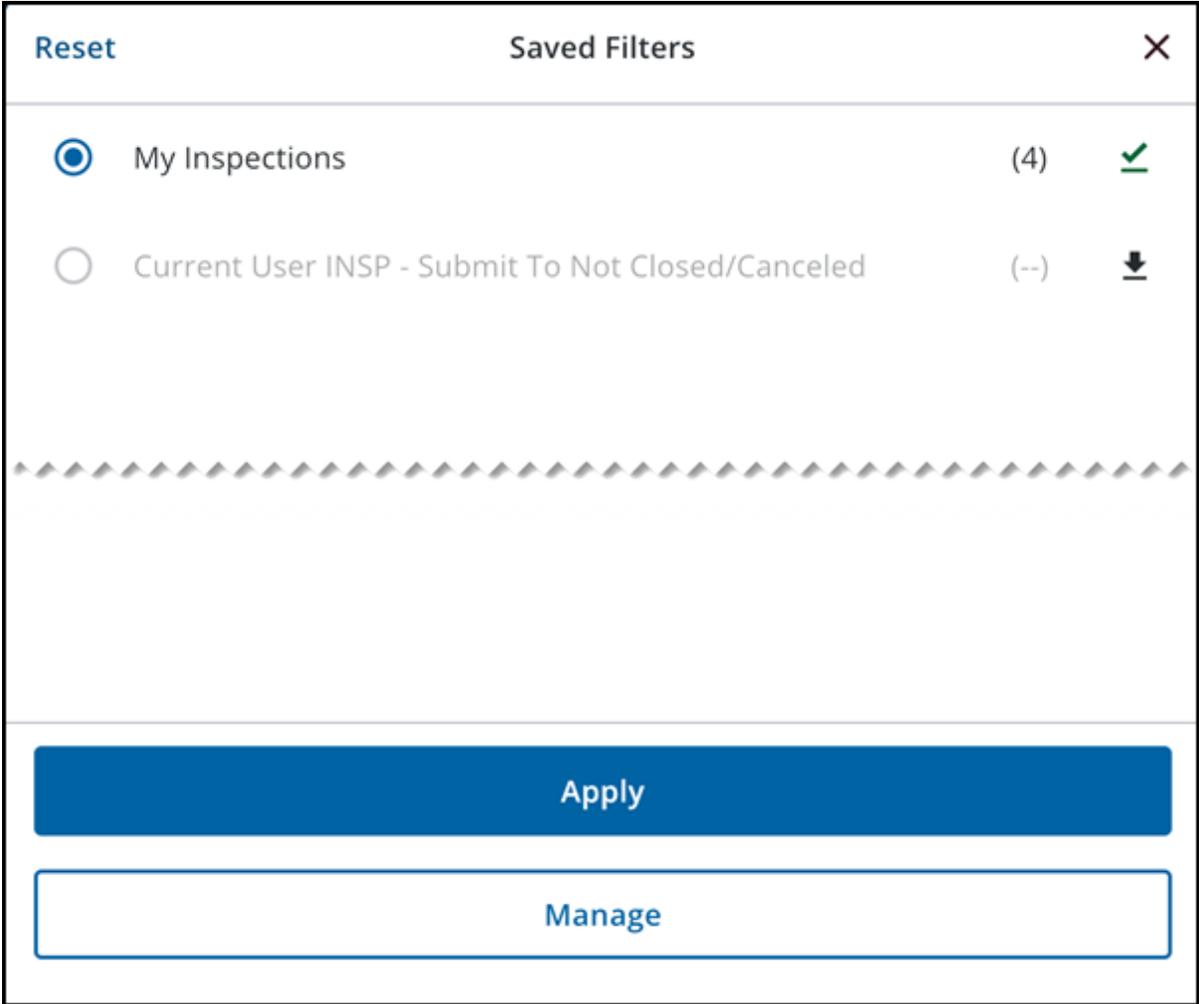
 **NOTE:** Saved filters in the Trimble Unity Field app are based on queries created in Maintain. See [Queries](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

Download and Apply Saved Filters

1. Tap **Activity Types** and select the work activity type for which you want to set a saved filter. For example, select **Work Orders** to set a default saved filter for the work order activity list.
2. Tap **Saved Filters**.



The **Saved Filters** panel opens. Filters that can be downloaded appear beside a **Download** icon (), while filters that are already downloaded appear beside a **Downloaded** icon (). The number of work activities included in the saved filter appear in parentheses.



- 3. Tap to download a saved filter.
- 4. Select the saved filter you would like to use.
- 5. Tap **Apply**.

The saved filter you apply becomes your default saved filter and is remembered even after switching activity types or logging out of the app. The activity list displays the active saved filter.

Manage Saved Filters

- 1. Tap **Manage** to manage your saved filters and queries.
- 2. Select your saved filters.
- 3. To clear the saved filters, tap **Clear Work Activities**.

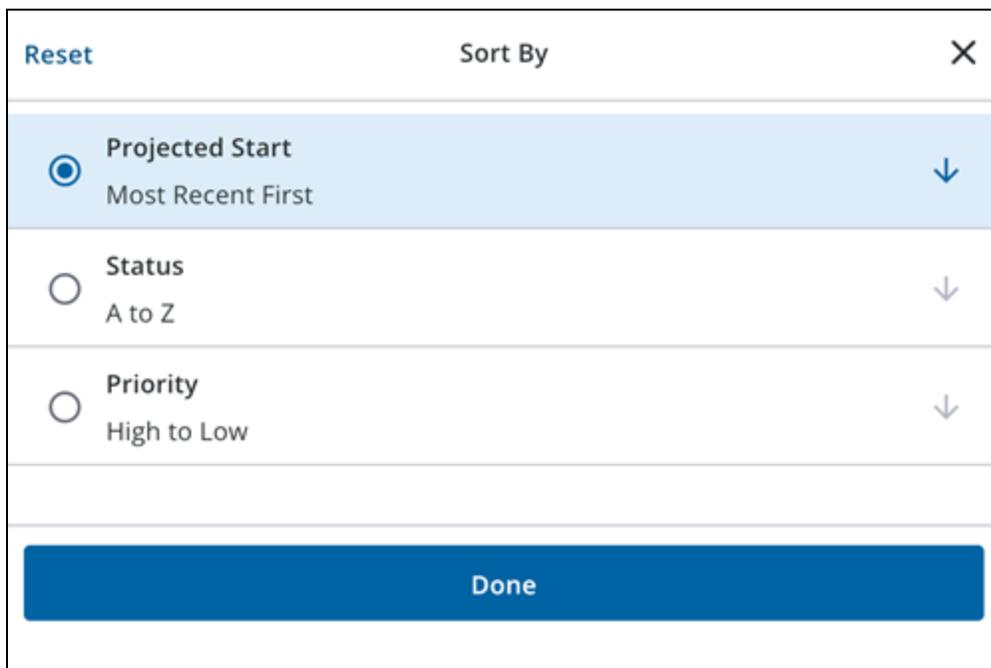
Sort By

Work activities can be sorted by summary fields like **Projected Start**, **Status**, and **Priority**. These filters may vary depending on the selected work activity list. The selected filter remains on the work activity list until cleared.

1. Tap **Sort By**.



2. Tap a filter to sort by.
3. Tap the arrow to change the sort order. A down arrow indicates descending order, and an up arrow indicates ascending order.



4. Tap **Reset** to reset the filters and sorting criteria.
5. Tap **Done** to apply the changes.

View Work Activity Details

You can view work activity details by tapping on a summary card.

View Work Activity Details

You can perform actions and view information about a work activity on the work activity details screen.

1. Tap a work activity.

The work activity screen opens, displaying **Quick Menu Actions** and pages.

- **Zoom:** Tap to zoom to the work activity on the map.
- **Directions:** Tap to get directions to the work activity.
- **Attach:** Tap to add an attachment to the work activity.
- **Sync:** Tap to perform a sync.
- **More:** Tap to access more actions.
 - **Create Related Activity:** Tap to create a related work activity. This action is only available for work orders, service requests, and inspections.
 - **Locate:** Tap to utilize advanced locate for the work activity using GPS.
 - **Web:** Tap to open the work activity in the web application.
- **Save:** Tap to save changes made to the work activity.



2. Tap a work activity page to view more information and fields. See "Forms" on page 120 for more information.
 - **Menu** icon: Tap to view the list of pages. Tap a page to navigate to it.
 - **Next** arrow: Tap to navigate to the next page.
 - **Back** arrow: Tap to navigate to the previous page.
 - **Swipe left and right:** Swipe left or right on the screen with a finger to navigate between pages.
 - **Done:** Tap to exit the page and return to the work activity details page.

✕ Valve Accessibility

Is Valve Accessible? *

Yes

No

Surface Type

-- Please Select --
▾

Is Traffic Control Needed?

Yes

No

Traffic Control Methods

-- Please Select --
▾

Well/Chamber Cleaned?

Yes

No

Additional Accessibility Comments

<

>

☰

GPS
H:35m V:7m

Done

View Associated Assets

You can view assets associated to the work activity. See "Associated Assets" on page 95 for more information.

1. Tap a work activity.
2. Tap **Associated Assets**.

A list of all assets associated with the work activity appear.

View Related Activities

You can view activities related to the work activity. See "Create and View a Related Work Activity" on page 148 for more information. This action is only available for work orders, service requests, and inspections.

1. Tap a work activity.
2. Tap **Related Inspections**, **Related Service Requests**, or **Related Work Orders** to view associated activities.

Activity Types

You can view, create, and edit the following activity types in the app:

- Work Orders
- Inspections
- Service Requests
- Cases
 - Case Tasks (View and edit only)
 - Case Violations (View and edit only)

 **IMPORTANT:** To access Permit functionality in the app (cases, case violations, case tasks), you must first review and complete all prerequisites. See "Cases" on page 71 for more information.

Work Orders

You can view, edit, and create work orders in the app.

A work order is designed for tracking maintenance activities performed by individuals or crews and detailing the tasks to be done and the costs incurred.

Templates are created by the domain administrator for each work activity and stored with default values, such as category, priority, duration, print template, comments, instructions, etc. These can be configured in Admin. See [Work Orders](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

View Work Orders in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Work Orders**.

The work activity list updates.

Create a Work Order

You can create a work order using the **Add** icon on the map.

1. Open the **Map**.
2. Tap the **Add** icon.

The **Add** panel opens.

3. Tap **Work Orders**.
4. Select an **Asset Group**.
5. Select an **Asset Type**.
6. Select a **WorkOrder Template**.
7. The **Create Work Order** panel appears.
8. Enter information into the desired fields for the work order.
9. Tap **Save**.

The work order is created and appears on the map and in your activity list.

Edit a Work Order

You can edit an existing work order.

1. Tap a work order.
2. Edit the work order details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The work order is updated.

Work Order Tasks

If a work order is configured to have tasks associated with it, these tasks are automatically added to the work order when it is created.

The work order details screen displays whether tasks exist and shows the number of completed tasks versus the total number of tasks. For example, **3/6 Completed** means three out of the six tasks have been completed. If all tasks are completed, the **Tasks** field will display a **Complete** status.

1. In a work order, tap **Tasks**.

The **Tasks** page opens. A status bar displaying the number of total tasks and the number of completed tasks appears at the top of the tasks list.

The following options are available from the **Tasks** page:

- **Drop-down** icon: Tap to collapse or expand the task view.
- **Start**: Tap to start the task.
- **Stop**: Tap to stop the task and mark it as complete. Marking a task as complete updates the status bar at the top of the tasks list.
- **Complete**: Displays when the task is complete.
- **Done**: Tap to return to the work order activity details page.

Tasks (6)

1 of 6 Completed

^ Investigate Task Complete

Assigned To

Actual Start
06/23/2025, 04:13 PM

Actual Finish
06/23/2025, 04:13 PM

Response

Issue Found

No Issue Found

Comments

^ Notification Task Stop

Assigned To

Actual Start
06/23/2025, 04:13 PM

Actual Finish

Response

< > ☰

Done

2. Tap **Start** to automatically enter the actual start date and time for the task.
3. Select a **Response**.
4. Enter any comments related to the task into the **Comments** field, if applicable.
5. Tap **Stop** to automatically enter the actual finish date and time for the task.
6. Repeat Steps 2-5 for all remaining tasks.
7. When all tasks are completed, tap **Done**.

The work order details screen opens and displays a **Completed** status in the **Tasks** field, indicating that all tasks have been completed for the work order.

Work Order Fields

The following fields are found on the work order and tasks **Activity Details** pages. Depending on your configuration settings, different work activity fields may appear than are displayed in this list.

Work Order Fields

- **General:** Tap to view general fields for the work order.
 - **Description:** A description of the work order.
 - **Entity Type:** A description of the entity type.
 - **Status:** Tap to select a status.
 - **Priority:** Tap to select a priority.
 - **Submit To:** Tap to assign the work order to a user.
 - **Supervisor:** Tap to assign a supervisor.
 - **Projected Start:** Tap to select a projected start date and time.
 - **Projected Finish:** Tap to select a projected finish date and time.
 - **Actual Start:** Tap to select the actual start date and time.
 - **Actual Finish:** Tap to select the actual finish date and time.
 - **Predefined Instructions:** Tap to view predefined instructions.
 - **Comments:** Tap to view comments. Tap **Add** to add a comment.
 - **Project:** Tap to associate the work order to a project.
 - **Resolution:** Tap to select a resolution.
 - **Contract:** Tap to select a contract.
 - **Contractor Billable:** Select whether the work order is contractor billable. A work order can be marked as billable to a specific contractor or subcontractor for reporting purposes, billbacks, and legal recourse.
 - **Contractor:** If billable, tap the **Contractor** drop-down list to select a contractor.
- **Custom Fields:** Tap to view and edit custom fields.
- **Location:** Tap to view and edit location details.
- **Associated Assets:** Tap to view and edit associated assets. The number in parentheses indicates the number of associated assets.

- **Attachments:** Tap to view and edit attachments. The number in parentheses indicates the number of attachments.
- **Costs:** Tap to view and edit costs.
- **Tasks:** The work order details screen displays whether tasks exist and shows the number of completed tasks versus the total number of tasks. For example, **3/6 Completed** means three out of the six tasks have been completed. If all tasks are completed, the **Tasks** field will display a **Complete** status. See "Work Order Tasks" on page 59 for more information.
- **Related Inspections:** Tap to create, view, and edit related inspections. The number in parentheses indicates the number of related inspections.
- **Related Work Orders:** Tap to create, view, and edit related work orders. The number in parentheses indicates the number of work orders.
- **Related Service Requests:** Tap to create, view, and edit related service requests. The number in parentheses indicates the number of service requests.
- **Universal Custom Fields:** Tap to view and edit universal custom fields.

Work Order Task Fields

- **Drop-down icon:** Tap to collapse or expand the task view.
- **Start:** Tap to start the task.
- **Assigned To:** Select the employee who the task is assigned to.
- **Actual Start Date:** Enter the actual start date or select it using the calendar.
- **Actual Finish Date:** Enter the actual finish date or select it using the calendar.
- **Response:** Select a response or enter a free-form response.
- **Comments:** Enter any comments related to the task.
- **Stop:** Tap to stop the task and mark it as complete. Marking a task as complete updates the status bar at the top of the tasks list.
- **Complete:** Displays when the task is complete.
- **Done:** Tap to return to the work order page.

Inspections

You can view, edit, and create inspections in the app.

Observations on the condition of assets and information about simple repair work are recorded on inspections. Inspections can only be done for one asset. If multiple assets are selected, an inspection is created for each one. Custom inspection templates are configured by the administrator in Admin. See [Inspections](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

View Inspections in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Inspections**.

The work activity list updates.

Create an Inspection

You can create an inspection using the **Add** icon on the map.

1. Open the **Map**.
2. Tap the **Add** icon.

The **Add** panel opens.

3. Tap **Inspections**.
4. Select an **Asset Group**.
5. Select an **Asset Type**.
6. Select an **InspectionTemplate**.
7. The **Create Inspection** panel appears.
8. Enter information into the desired fields for the inspection.
9. Tap **Save**.

The inspection is created and appears on the map and in your activity list.

Edit an Inspection

You can edit an existing inspection.

1. Tap a inspection.
2. Edit the inspection details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The inspection is updated.

Maintenance Quality Assurance Inspection Observations

Maintenance Quality Assurance (MQA) Surveys are used to inspect samples of a road network to measure the overall network performance. These surveys assess a segment of road based on a survey of defined performance metrics. This can be used for planning and a way of prioritizing the work that needs to be done.

 **NOTE:** See [MQA Survey Templates](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information on how to configure an MQA survey template.

You can view MQA inspections in Trimble Unity Field and add or update the **Count** and **Total** fields.

1. Open an MQA inspection you are assigned to.
2. Tap **Observations**.
3. Tap the **Count** field to enter the count.
4. Tap the **Total** field to enter the total.



The screenshot displays the 'Observations' screen with the following data:

Category	Count	Total
Potholes	2	3
Signs	1	5

5. Tap **Done** to save the changes.

Inspection Observation Attachments

You can directly add, view, and edit attachments within observation fields for inspections to improve the clarity of inspection data, leading to faster decision making and more effective asset management.

1. Open an inspection.
2. Tap **Observations**.

The **Observations** page opens. The **Attach** icon beside each field displays the number of existing attachments, if any.

Observations

Water Meter Box Cover

- Good Condition
- Cracked Cover
- Broken Cover
- Missing Cover

Meter Box Condition

-- Please Select --

Water Service Cutoff Valve

- Good Condition
- Difficult to Close/Open
- Very Difficult to Close/Open
- Cannot be Closed

Water Meter Leaks

- No Leaks Observed
- Leaks at Connections
- Leaks Observed in Service Cutoff Valve
- Leaks Observed in Water Meter

Done

Add an Attachment

You can attach a photo, video, map capture, or document to the observation field.

1. Tap the **Attach** icon.
2. Tap the desired attachment type to add.
 - **Photo**: Tap to add a photo.
 - **Video**: Tap to add a video.
 - **Camera Roll**: Tap to add an existing photo from the device's camera roll.
 - **Map Capture**: Tap to add a map capture.
 - **Document**: Tap to add a document.
3. Add the attachment.

- **Markup:** Tap to mark up the attachment.
- **Rename:** Tap to rename the attachment.
- **Description:** Tap to add a description for the attachment.
- **Back:** Tap to return to the **Observations** page without saving.

4. Tap **Save**.

View and Edit an Attachment

You can view attachments associated with the observation field.

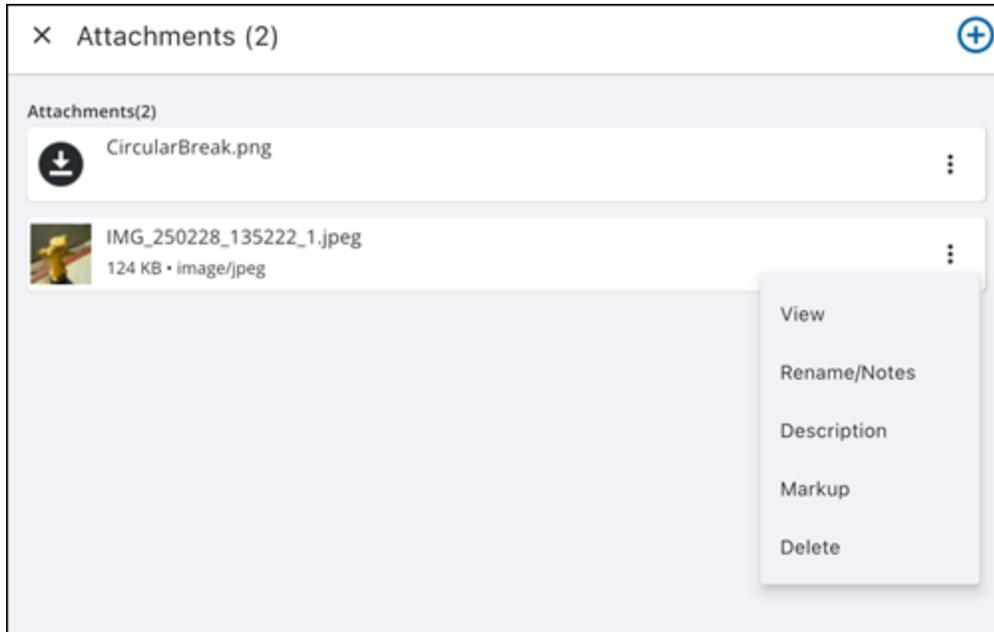
1. Tap the **Attach** icon.

Any existing attachments appear.

2. To add another attachment, tap the **Add** icon.

3. Tap the **More** icon on an existing attachment to access more actions.

- **More** icon: Tap to view more actions.
 - **View:** Tap to view the attachment.
 - **Done:** Tap the attachment and tap **Done** to exit viewing.
 - **Rename/Notes:** Tap to rename the attachment or add a note.
 - **X** icon: Tap to remove the current attachment name.
 - Tap the field to enter a new name or add a note.
 - **Rename:** Tap to save the new attachment name.
 - **Description:** Tap to add a description.
 - Tap the field to enter a description.
 - **Update:** Tap to update the description.
 - **Markup:** Tap to use markup tools to mark the image with annotations.
 - **Color picker** icon: Tap to change the markup color.
 - Draw on the attachment to mark it up.
 - **Undo:** Tap to undo the markup.
 - **Save:** Tap to save the markup.
 - **Delete:** Tap to delete the attachment.



Add Signatures

You can add a signature to an inspection from your device.

1. Open an inspection.
2. Tap **Signature**.
3. Tap **Add**.
4. Tap to select a **Sign off from** option from the drop-down list.
5. Use your finger or a stylus to draw the signature.
 - **Clear**: Tap to clear the signature.
 - **Cancel**: Tap to cancel without saving.
6. Tap **Save**.



Inspection Fields

The following fields are found on the inspection **Activity Details** page. Depending on your configuration settings, different work activity fields may appear than are displayed in this list.

- **General:** Tap to view general fields for the inspection.
 - **Status:** Tap to select a status.
 - **Template:** Template details for the inspection.
 - **Initiated By:** User who initiated the inspection.
 - **Projected Start:** Tap to select a projected start date and time.
 - **Projected Finish:** Tap to select a projected finish date and time.
 - **Actual Finish:** Tap to select the actual finish date and time.
 - **Priority:** Tap to select a priority.
 - **Comments:** Tap to view comments. Tap **Add** to add a comment.
 - **Submit To:** Tap to submit the inspection to a user.
 - **Inspected By:** User who performed the inspection.
 - **Inspection Date:** Date of the inspection.
 - **Observations:** Tap to view and edit observations for the inspection.
 - **Repairs:** Tap to view and edit repair details for the inspection.
 - **Recommendations:** Tap to view and edit recommendations for the inspection.
 - **Resolution:** Tap to select a resolution.
- **Location:** Tap to view and edit location details.
- **Observations:** Tap to view and edit observation details. See "Maintenance Quality Assurance Inspection Observations" on page 63 for more information.
 - **Description:** Tap the drop-down arrow to expand the field and view the description.
 - **Instructions:** Tap the drop-down arrow to expand the field and view the instructions.
 - **Explanation:** Tap the drop-down arrow to expand the field and view the explanation.
 - **Attach** icon: Tap to add, view, or edit an observation attachment. See "Inspection Observation Attachments" on page 64 for more information.
- **Measurements:** Tap to view and edit measurement details.
- **Calculations:** Tap to view calculation details.
- **Associated Assets:** Tap to view and edit associated assets. The number in parentheses indicates the number of associated assets.
- **Attachments:** Tap to view and edit attachments. The number in parentheses indicates the number of attachments.
- **Signature:** Tap to view and edit signatures. See "Add Signatures" on the previous page for more information.
- **Costs:** Tap to view and edit costs.

- **Related Inspections:** Tap to create, view, and edit related inspections. The number in parentheses indicates the number of related inspections.
- **Related Work Orders:** Tap to create, view, and edit related work orders. The number in parentheses indicates the number of related work orders.
- **Related Service Requests:** Tap to create, view, and edit related service requests. The number in parentheses indicates the number of related service requests.
- **Universal Custom Fields:** Tap to view and edit universal custom fields.

Service Requests

You can view, edit, and create service requests in the app.

A service request is a request for service initiated through a contact to the organization, generally a citizen's call, describing some type of problem (usually at a specific location) and the action taken to remedy the situation. Three basic elements are needed to initiate a service request:

- The problem
- The incident location
- The caller or contact information

A service request tracks the action from the initial contact to dispatch and investigation, and then to the resulting recommendation. A service request is attached to an incident location and can be represented by a single point on the map, making it easy to link other callers reporting the same problem in the area to a single service request.

Service request templates can be configured by the administrator in Admin. See [Service Requests](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

View Service Requests in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Service Requests**.

The work activity list updates.

Create a Service Request

You can create a service request using the **Add** icon on the map.

1. Open the **Map**.
2. Tap the **Add** icon.

The **Add** panel opens.

3. Tap **Service Requests**.
4. Select an **Category**.
5. Select a secondary **Category**.
6. Select a **Template**.
7. The **Create Service Request** panel appears.
8. Enter information into the desired fields for the service request.
9. Tap **Save**.

The service request is created and appears on the map and in your activity list.

Edit a Service Request

You can edit an existing service request.

1. Tap a service request.
2. Edit the service request details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The service request is updated

Service Request Fields

The following fields are found on the service request **Activity Details** page. Depending on your configuration settings, different work activity fields may appear than are displayed in this list.

- **General:** Tap to view general fields for the service request.
 - **Description:** A description of the service request.
 - **Status:** Tap to select a status.
 - **Initiated By:** User who initiated the service request.
 - **Project:** Tap to associate the service request to a project.
 - **Projected Complete:** Tap to select a projected complete date and time.
 - **Priority:** Tap to select a priority.
 - **Submit To:** Tap to assign the service request to a user.
 - **Dispatch To:** Tap to select a user to dispatch the service request to.
 - **Dispatch To Date:** Tap to add a date and time for the service request to be dispatched to a user.
 - **Comments:** Tap to view comments. Tap **Add** to add a comment.
 - **Resolution:** Tap to select a resolution.

- **Investigation?:** Select if this service request has been investigated.
- **Investigation Date:** Tap to select a date and time for the investigation.
- **Custom Fields:** Tap to view and edit custom fields.
- **Location:** Tap to view and edit location details.
- **Caller Information:** Tap to view and edit caller information.
- **Associated Assets:** Tap to view and edit associated assets. The number in parentheses indicates the number of associated assets.
- **Attachments:** Tap to view and edit attachments. The number in parentheses indicates the number of attachments.
- **Costs:** Tap to view and edit costs.
- **Related Inspections:** Tap to create, view, and edit related inspections. The number in parentheses indicates the number of related inspections.
- **Related Work Orders:** Tap to create, view, and edit related work orders. The number in parentheses indicates the number of related work orders.
- **Related Service Requests:** Tap to create, view, and edit related service requests. The number in parentheses indicates the number of related service requests.
- **Universal Custom Fields:** Tap to view and edit universal custom fields.

Cases

You can view, edit, and create cases in the app when all prerequisites are met.



PREREQUISITES:

- **User and Organization Setup:**
 - You must be assigned to an employee organization. See [Add or Edit an Employee](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
 - You must be assigned to a user organization. See [Add a Permit User](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
 - Select a default organization. This organization can be the same as your user organization. If a default organization is not selected, you will not be able to utilize Trimble Unity Permit functionality in the app. See [Add a Permit User](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- **Permit Licensing and Role:**
 - You must be licensed for Unity Permit Case API Extended and Unity Permit Edit + in Trimble Unity Admin. See [Assign Licensing](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

information.

- To access Code Enforcement Inspection cases, you must be assigned to the **Inspector** role. See [Make a User an Inspector](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- **ArcGIS Advanced Editing License:**
 - You must have an ArcGIS Advanced Editing license to edit parcels. If you do not have this license, you will not be able to make any changes to asset details and an error will appear informing you that your ArcGIS license does not support editing of this feature and an Advanced Editing license is required. Please contact your administrator or see [Introducing the ArcGIS Advanced Editing user type extension](#) on Esri's website for more information.

Permits, Licensing, and Land is a GIS-centric community development and management application. It enables agencies to track permits, planning and development activities, engineering processes, business or regulatory licenses, and code enforcement cases from initiation to closure. The built-in workflow engine efficiently tracks all applicable tasks, from initial application or citizen/customer call, through departmental plan reviews, fee collection, permit issuance, inspections, board and commission meetings, abatement, court hearings, license renewals, and more.

A case (also known as a permit) is a specific occurrence or matter requiring decision, investigation, and/or work activities by officials. Permits, business licenses, and code enforcement activities with their applicable tasks are configured in case templates. Specific case templates can be configured to manage different processes. The following items are the basic elements that can be included in a case. A case template is set up to only include the relevant items.

- Address/GIS
- Condition
- Contractor
- Data Group
- Deposit
- Fees
- Flags
- GIS Alerts
- Inspection Request
- Instrument
- Licenses
- Main
- Notes

- Payment
- People
- Related Documents (also known as attachments)
- Violations
- Workflow and tasks

You can set up as many templates as you need in order to manage all your processes. See [Add a Case Template](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

View Cases in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Cases**.

The work activity list updates.

Create a Case

You can create a case using the **Add** icon on the map.

1. Open the **Map**.
2. Tap the **Add** icon.

The **Add** panel opens.

3. Tap **Cases**.
4. Select a **Category**.
5. Select a **Template**.
6. The **Create Case** panel appears.
7. Enter information into the desired fields for the case.
8. Tap **Save**.

The case is created and appears on the map and in your activity list.

Edit a Case

You can edit an existing case.

1. Tap a case.
2. Edit the case details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The case is updated.

View Tasks Associated to a Case

You can view tasks associated to a case.

1. Open a case.
2. Tap **Tasks**.

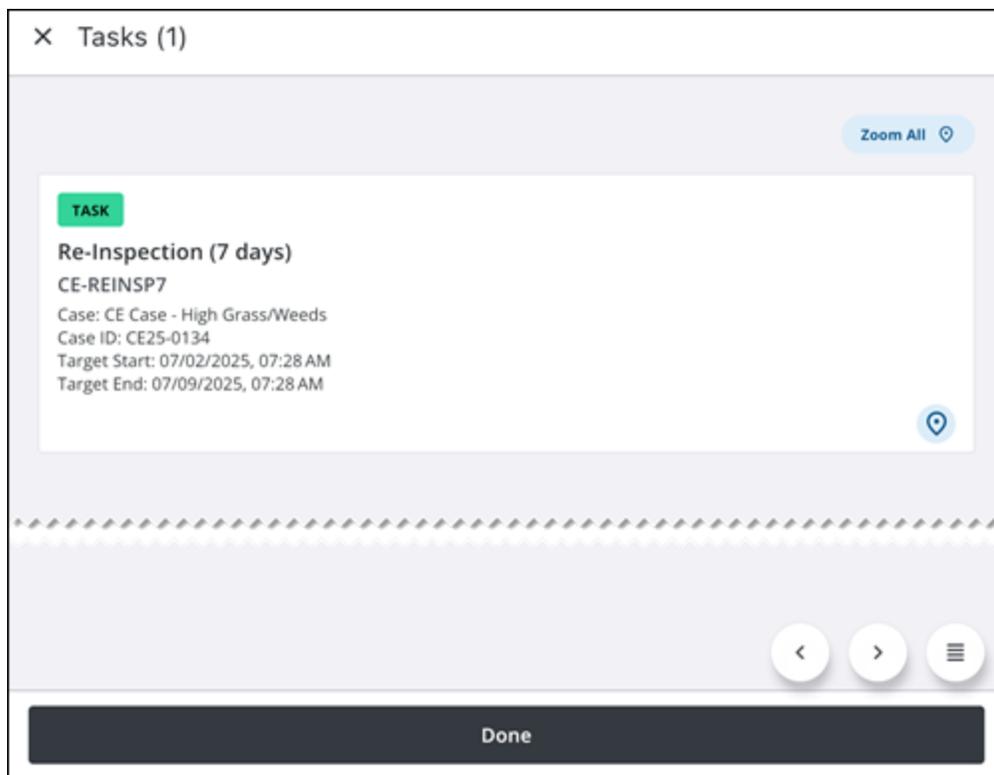
The **Tasks** page opens. The number in parentheses displays the number of tasks associated to the case

The following options are available from the **Tasks** page:

- **Zoom all:** Tap to zoom to all tasks on the map.
- **Map icon:** Tap to view the task on the map.
- **Done:** Tap to return to the case work activity details page.

3. Tap on a task to open the **Task** work activity details page.

The task opens. See "Case Tasks" on page 76 for more information.



View Violations Associated to a Case

You can view violations associated to a case.

1. Open a case.
2. Tap **Violation**.

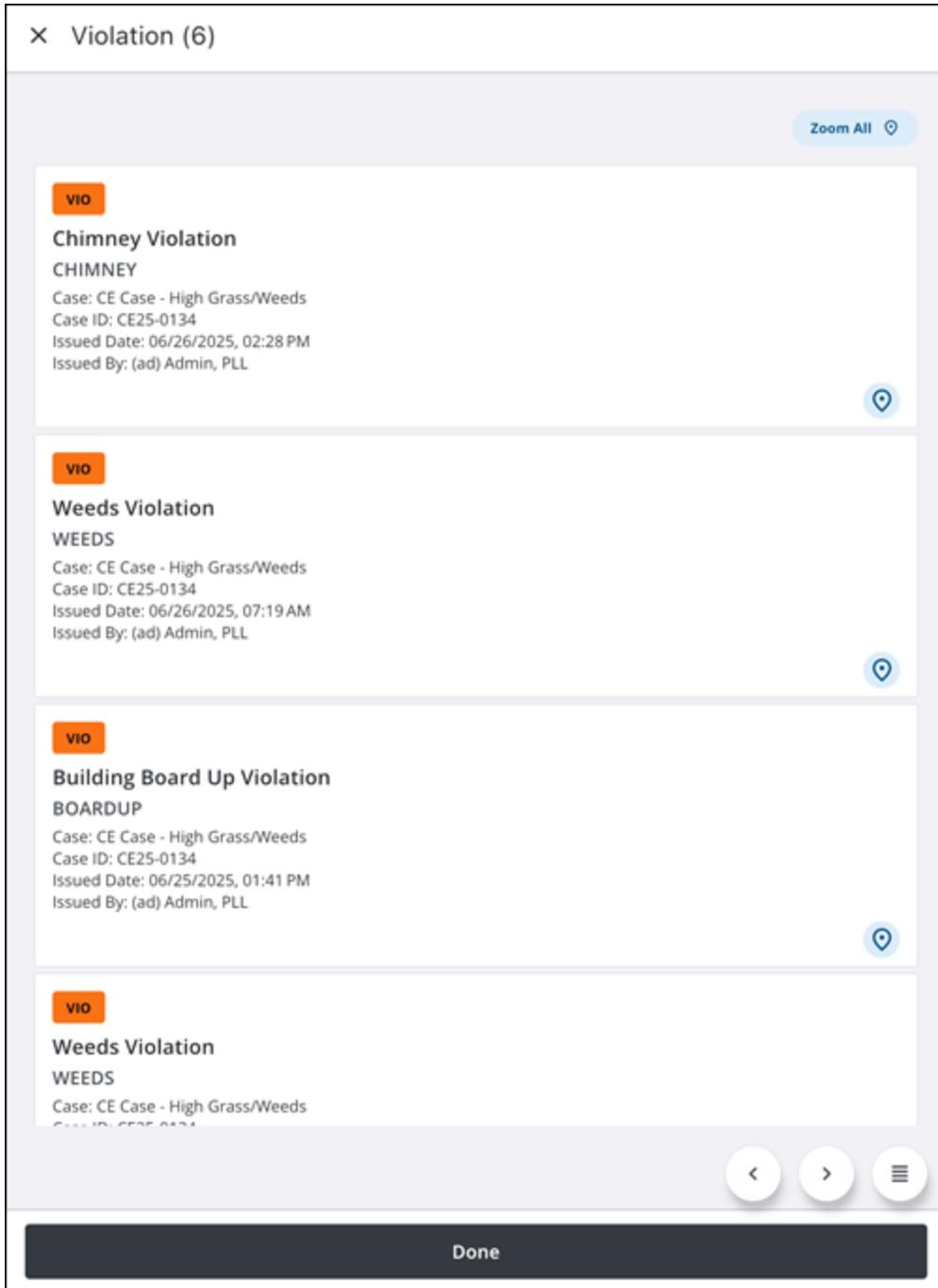
The **Violation** page opens. The number in parentheses displays the number of violations associated to the case

The following options are available from the **Violation** page:

- **Zoom all:** Tap to zoom to all tasks on the map.
- **Map icon:** Tap to view the task on the map.
- **Done:** Tap to return to the case work activity details page.

3. Tap on a violation to open the **Violation** work activity details page.

The violation opens. See "Case Violations" on page 80 for more information.



Case Tasks

You can view and edit case tasks in the app.

Tasks are the individual steps required for a case to progress from application to completion. To add a task to a case, see [Add a Task](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

Task types include Inspections, Reviews, and Hearings.

The default query for case tasks automatically displays tasks (most recent results appearing first) that meet the following criteria:

- Available
- Assigned to Current User
- Not in a Completed, Closed, Canceled, or Inactive State

View Case Tasks in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Case Tasks**.

The work activity list updates.

Edit a Case Task

You can edit an existing case task.

1. Tap a case task.
2. Edit the case task details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The case task is updated.

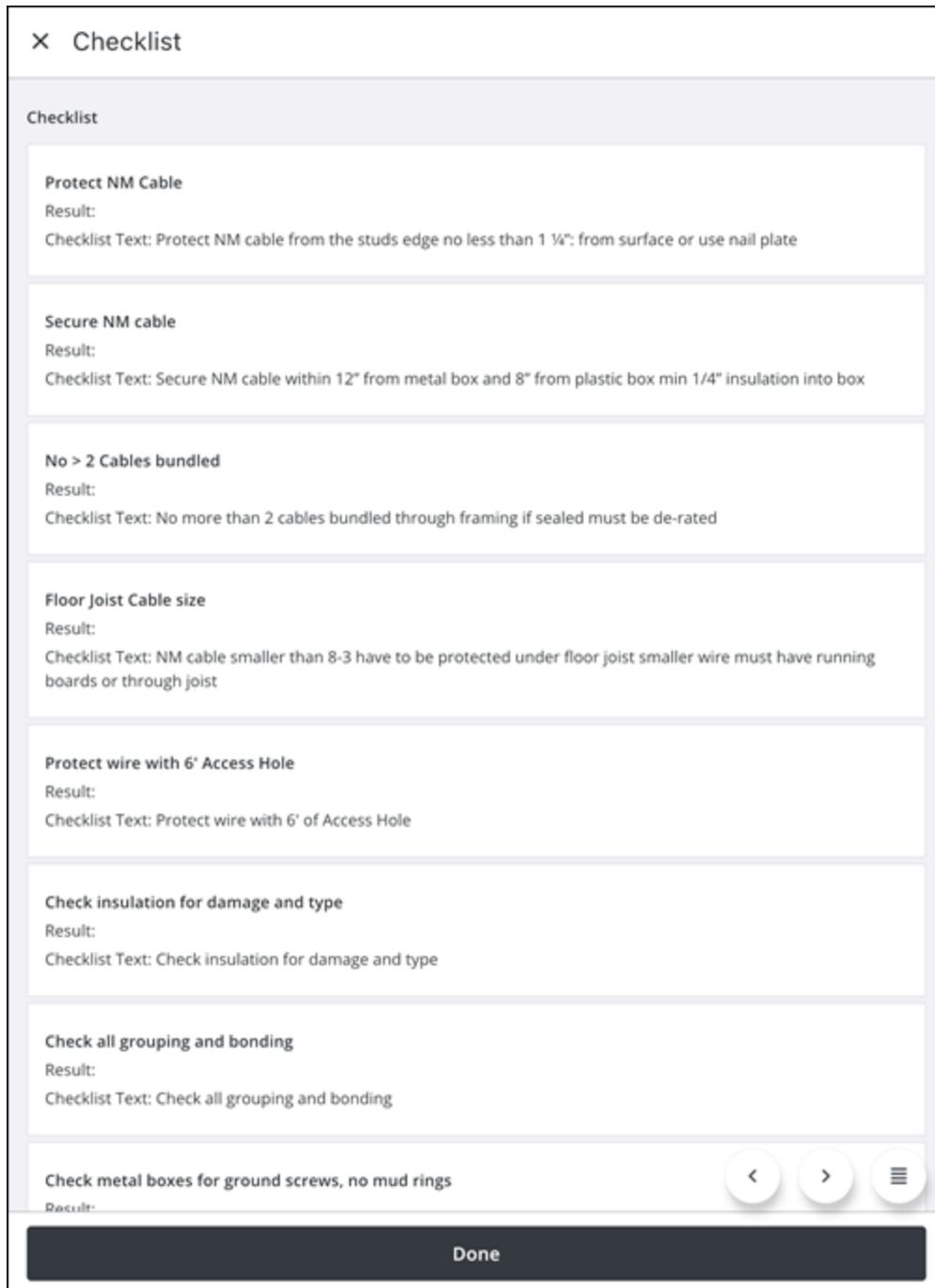
View or Update a Checklist

Case tasks may include associated checklists that outline required items, necessary steps, or further consideration. They are attached to the respective case tasks and should be reviewed and completed as part of the task's workflow. If it is configured by the administrator, a checklist must be completed before the task can be completed in the workflow.

You can view and update checklists in the app.

1. Tap to open a case task.
2. Tap **Checklist**.

The **Checklist** page opens with a list of checklist items.



3. Tap a checklist item.

The **Edit Checklist** panel opens.

- **Description:** The description of the checklist configured by the administrator.
- **Result:** Select the result by tapping the radio button, such as if it passes or fails. The result codes available in the Result list vary depending on the checklist.

- **Checklist Text:** Automatically populates with any text added by the administrator to the checklist.

4. Select a **Result**.

5. Tap **Save**.

The checklist item is saved.

Edit Checklist X

Description
Protect NM Cable

Result

Fail

Pass

Checklist Text
Protect NM cable from the studs edge no less than 1 1/4": from surface or use nail plate

Save

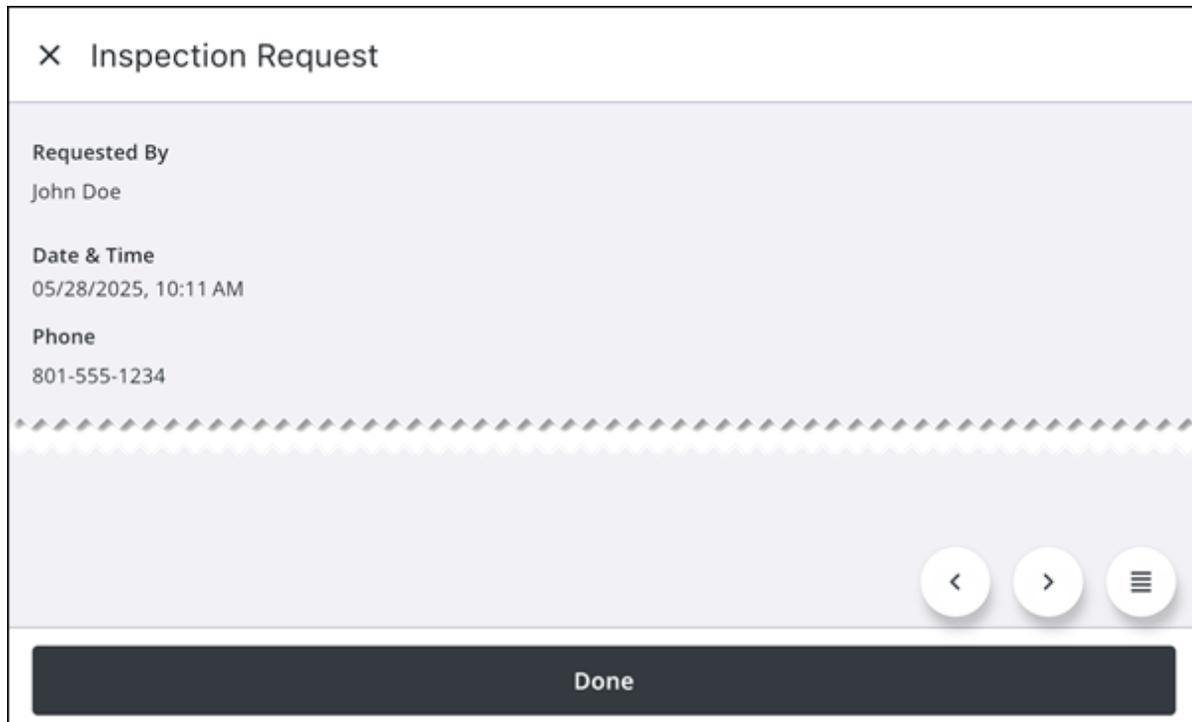
View an Inspection Request

When a task has an inspection request, details including the **Requested By** user, the request **Date & Time**, and **Phone** number can be viewed.

1. Open a case task.
2. Tap **Inspection Request**.

The **Inspection Request** page opens, showing the following details:

- **Requested By:** The name of the person who requested the inspection.
- **Date & Time:** The date and time that the inspection request was made.
- **Phone:** The phone number of the person who requested the inspection.



Case Violations

You can view and edit case violations in the app.

Code violations are used to identify conditions that do not meet a set of rules or code requirements. To add a violation to a case, see [Add a Violation](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

The default query for case violations automatically displays violations (most recent results appearing first) that meet the following criteria:

- Assigned to Current User
- Not in a Completed, Closed, Canceled, or Inactive State

View Case Violations in the Activity List

The work activity list displays all of the work activities in your selected work **Activity Type**.

1. Tap the **Activity Type** on the Top Navigation menu.

The **Activity Types** panel opens, displaying each activity type along with the number of work activities in each work activity list. The displayed count indicates how many activities of that type are assigned to you. For example, **Assigned to me (7)** above **Service Requests** indicates that there are seven service requests assigned to you.

2. Tap **Case Violations**.

The work activity list updates.

Edit a Case Violation

You can edit an existing case violation.

1. Tap a case violation.
2. Edit the work order details. See "View Work Activity Details" on page 55 for more information.
3. Tap **Save**.

The case violation is updated.

Case Fields

The following fields are found on the case, case tasks, and case violations **Activity Details** pages. Depending on your configuration settings, different work activity fields may appear than are displayed in this list.

Case Fields

- **General:** Tap to view and edit general fields for the case.
 - **Initiated By:** Displays the login ID of the user who created the case. This field cannot be changed.
 - **Tag:** A free-form label for the activity this case is associated with. This is not a required item, but can be useful in tracking and organizing large projects that include many different cases.
 - **Accepted By:** Displays the login ID of the person who accepts the case. It displays data entered on the **Create Work Activity** panel, or automatically populates with the current user when the case is saved.
 - **Status:** Tap to select a status. The initial status varies, depending on the case type selected and how the case is configured by the administrator.
 - **Comments:** Tap to view and add comments. Tap **Add** to add a comment. See the **Comments** drop-down in the "Forms" on page 120 topic for more information.
- **Custom Fields:** Tap to view and edit custom fields.
- **Location:** Tap to view and edit location details.
 - **Location:** Tap to enter a location for the work activity.
 - **Capture:** Tap to capture the work activity location. See "Quick Capture a Work Activity Location Using GNSS" on page 105 for more information.
 - **Map:** Tap to select a location on the map. See "Manually Digitize a Work Activity Location from the Map" on page 106 for more information.
 - **Clear:** Tap to clear the selected location.
 - **Details:** Tap to view location details.
- **Associated Assets:** Tap to view and edit associated assets.

- **Tasks:** Tap to view related **Tasks**. The number in parentheses displays the number of tasks associated to the case. See "Case Tasks" on page 76 for more information.
- **Violation:** Tap to view related **Violations**. The number in parentheses displays the number of violations associated to the case. See "Case Violations" on page 80 for more information.
- **Attachments:** Tap to view and edit attachments.

Case Task Fields

- **General:** Tap to view and edit general fields for the case task.
- **Inspection Request:** Tap to view inspection request information, if any. Some case types require one or more inspections before the case can progress to completion. Furthermore, inspections may only be scheduled once the corresponding task becomes available in the workflow. Requested inspections can be viewed in the app.
 - **Requested By:** The name of the person who requested the inspection.
 - **Date & Time:** The date and time that the inspection request was made.
 - **Phone:** The phone number of the person who requested the inspection.
- **Checklist:** Tap to view the case task checklist, if configured. Tasks may include associated checklists that outline required items, necessary steps, or further consideration. They are attached to the respective tasks and should be reviewed and completed as part of the task's workflow. If it is configured by the administrator, a checklist must be completed before the task can be completed in the workflow.
- **Attachments:** Tap to view and edit attachments.

Case Violation Fields

- **Completed By:** The person who completed the violation.
- **Date Completed:** The date the violation is completed.
- **Violation Text:** The description of the violation. This information may load automatically when the violation type is selected if configured by the administrator.
- **Remedial Text:** Displays details on how the violation may be resolved. This information may load automatically when the violation type is selected if configured by the administrator.

Asset-Based Work Activities

You can create, view, and edit asset-based work activities from the map, selected assets, or an existing work activity.

✓ PREREQUISITES:

- Assets must be associated with the Service Request Template Type to successfully create an attached service request. See [Add or Edit a Service](#)

[Request Template](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

Create Asset-Based Work Activities

An asset-based work activity is associated with specific assets on the map.

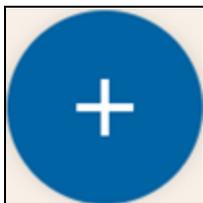
 **NOTE:** The selected work activity type determines which activities you can create or search. For example, selecting the **Service Requests** work activity type allows you to create new service requests and search existing ones. See "View Work Activity Lists and Summary Cards" on page 41 for more information.

Complete one of the following to create an asset-based work activity:

From the Map

You can create an asset-based work activity using the **Add** icon on the map.

1. Open the **Map**.
2. Tap the **Add** icon.



The **Add** panel opens.

3. Tap the desired work activity to create.
4. Select an **Asset Group**.
5. Select an **Asset Type**.
6. Select a work activity **Template**.

Select Asset Group

🔍 Search

- Electric >
- Facility Management >
- Fleet Vehicles >
- Natural Gas >
- Non-Maint Activity >
- Parks & Recreation >
- Planning & Dev >
- Sanitary Sewer >

Cancel

The **Create Work Activity** panel appears.

7. Enter information into the desired fields for the work activity.
8. Tap **Save**.

The work activity is created and appears on the map and in your activity list.

From a Selected Asset

You can create an asset-based work activity by selecting an asset on the map. Users can define their selection area with a box or by tapping on the map. See "Select Assets on the Map" on page 86 for more information.

From One Asset

1. Select one asset from the map.

The **Asset Details** card appears.

2. Tap **Create**.
3. Tap the desired work activity to create.

4. Select the work activity template.

The **Create Work Activity** panel appears.

5. Enter information into the desired fields for the work activity.
6. Tap **Save**.

The work activity is created.

From Multiple Assets

1. Select multiple assets from the map.

The **Assets** panel appears.

2. Tap the check box to select multiple assets.
3. Tap **Create**.
4. Tap the desired work activity to create.
5. Select the work activity template.

 **NOTE:** If you have selected incompatible assets, a message appears asking you to remove them. Tap **Remove** to remove the incompatible assets and continue creating a work activity.

A message appears asking if you would like to create a work activity for each asset or all assets.



Create Service Request For

Each Asset

All Assets

Create

Cancel

6. Select an option.
 - **Each Asset:** Tap to create separate work activities for each selected asset.
 - **All Assets:** Tap to create a work activity for all selected assets.

7. Tap **Create**.

The work activities are created.

From a Work Activity

You can create a related asset-based work activity from an existing work activity. A related work activity created from an existing work activity will have the same assets attached to it. This action is only available for work orders, service requests, and inspections.

1. Open a work activity that has assets associated to it.
2. Tap **Related Work Orders**, **Related Inspections**, or **Related Service Requests** depending on the work activity you would like to create.
3. Tap the **Add** icon.



A message appears asking if you want to create the related work activity on the same associated asset.

4. Tap **Yes**.
5. Select a work activity template.
6. Enter information into the desired fields for the work activity.
7. Tap **Save**.

The related work activity is created and appears under its respective related work activity field.

Select Assets on the Map

You can view and select assets from the map.

If your selection contains both work activities and assets, the **Choose a Type** panel appears.

- **Assets:** Tap to view selected assets.
- **Activities:** Tap to view selected work activities.

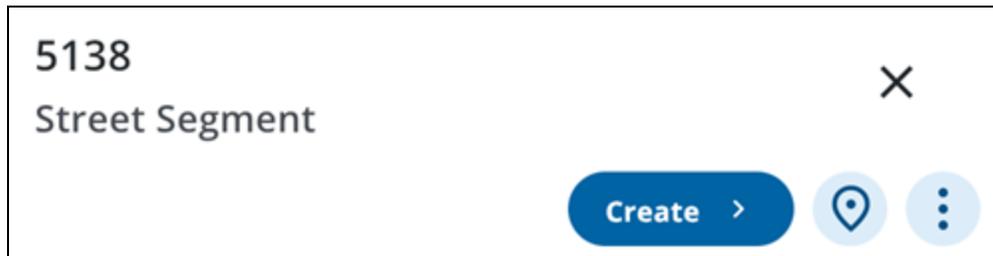
Choose a Type	×
Assets (84)	>
Activities (1)	>

 **NOTE:** You can choose which layers and assets on the map are selectable. See "Toggle the Visibility and Selection of Layers" on page 173 for more information.

Single Asset Selection

If a single asset is selected, the asset card appears on the map.

1. Open the **Map**.
2. Tap the **Select** icon or tap the map to select a single asset.
 - **Asset Card:** Tap the card to view the asset details. See "Asset Details" on page 93 for more information.
 - **Create:** Tap to create a work activity from the selected asset.
 - **Map** icon: Tap to view the selected asset on the map.
 - **More** icon: Tap to access more actions.
 - **Locate:** Tap to open advanced locate for the selected asset.
 - **Directions:** Tap to open driving directions to the selected asset.
 - **Web:** Tap to open the selected asset in the web application.



Multiple Asset Selection

If multiple assets are selected, the **Assets** panel appears displaying each asset.

1. Tap on the map.

Any selectable assets in that area are selected and appear on the **Assets** panel.



2. Tap the check box to select one or more assets.

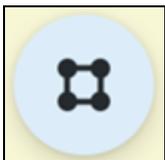
The number of selected assets updates and the **Create** option is available.

- Tap an asset to view the **Asset Details** screen.
- **Hierarchy** icon: Tap to open the asset hierarchy, if one is available.
- **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
 - **Web**: Tap to open the selected asset in the web application.
 - **View Asset Details**: Tap to view the asset details. See "Asset Details" on page 93 for more information.
- **Create**: Tap to create a new inspection, work order, or service request for the asset.

Use the Select Icon to Draw a Rectangle

The **Select** icon allows you to select assets on the map. Users can define their selection area with a rectangle drawn on the map.

1. Tap the **Select** icon.



2. Tap and drag across the map to draw a rectangle.



Any selectable assets in that area are selected and appear on the **Assets** panel.



Asset Hierarchy

You can view the asset hierarchy for a selected asset that has child assets or a hierarchy associated with it.

1. Select a single asset on the map via a tap or by drawing a rectangle.
2. Tap **Hierarchy**.



The **Hierarchy** panel opens.

3. Tap the check box to select one or more assets.

- **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
- **Create**: Tap to create a new inspection, work order, or service request for the asset.

Clear a Selection

Users can clear an existing selection.

1. Tap **X** or swipe down on the **Assets** panel to clear the selected assets.

Search For Assets

You can search for spatial and non-spatial assets by entering any search fields into the search bar or by using a barcode scanner.

✓ PREREQUISITES:

- To search for spatial and non-spatial assets or addresses in the app (both online and offline), you must first set up search functionality for your web map. This is done by configuring which layers and tables are searchable in your ArcGIS Online or ArcGIS Enterprise portal. See [Configure feature and table search for maps](#) in the ArcGIS Online documentation for more information.

Search the Assets List

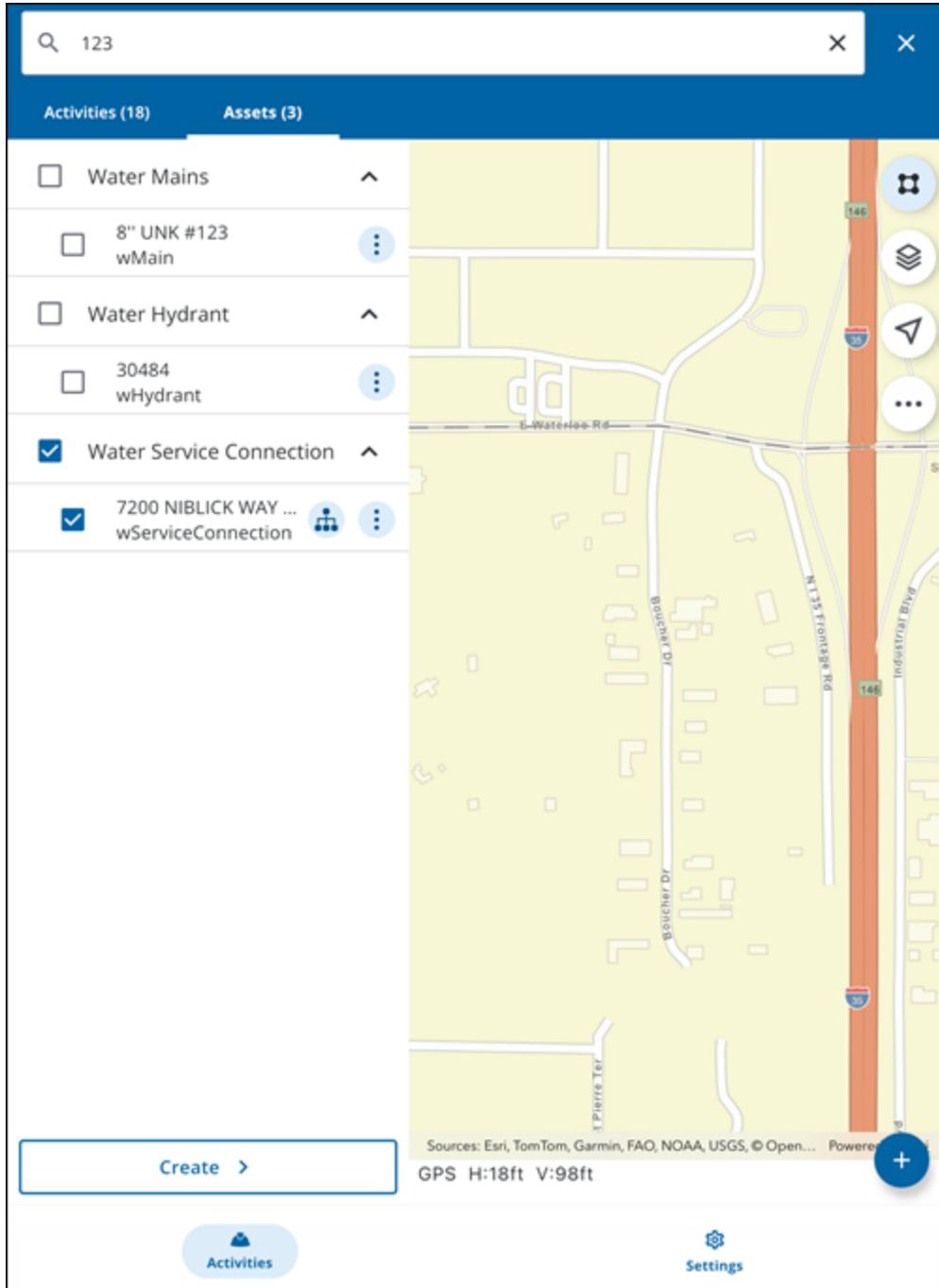
You can perform a manual search for spatial or non-spatial assets to view asset history, edit asset details, or create a work activity.

1. On the top toolbar, tap the **Search** icon.



2. Tap the **Assets** list.
3. Enter in a searchable field. For example, search **40** to return assets with an **OBJECTID** of **40**.
4. Select the desired asset that appears in the **Assets** list.
 - Tap an asset to view the **Asset Details** screen.
 - **Hierarchy** icon: Tap to open the asset hierarchy, if one is available.
 - **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
 - **Web**: Tap to open the selected asset in the web application.

- **View Asset Details:** Tap to view the **Asset Details** screen. See "Asset Details" on page 93 for more information.
- **Create:** Tap to create a new work order, inspection, or service request for the selected asset.



Search via the Barcode Scanner

You can scan linear barcodes or QR codes using the barcode scanner to quickly and accurately search for specific spatial or non-spatial assets.

1. On the top toolbar, tap the **Search** icon.

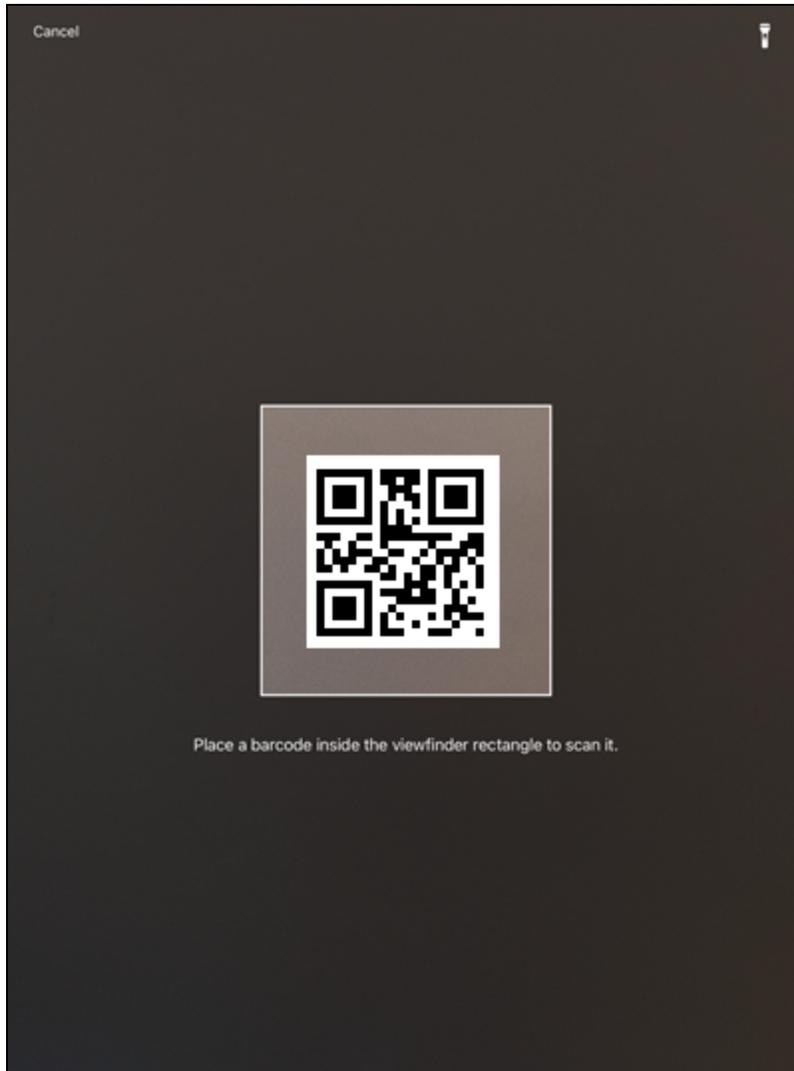


2. Tap the **Barcode Scanner** icon.



A message appears informing you that Trimble Unity Field requires camera access to continue.

3. Tap **Continue** and accept any other device permissions to allow camera access.
4. Place the linear barcode or QR code inside the viewfinder rectangle to scan it.



If there is more than one result, the results appear in the **Assets** list. See "Select Assets on the Map" on page 86 for more information.

If there is one asset, the **Asset Details** screen opens. See "Asset Details" below for more information.

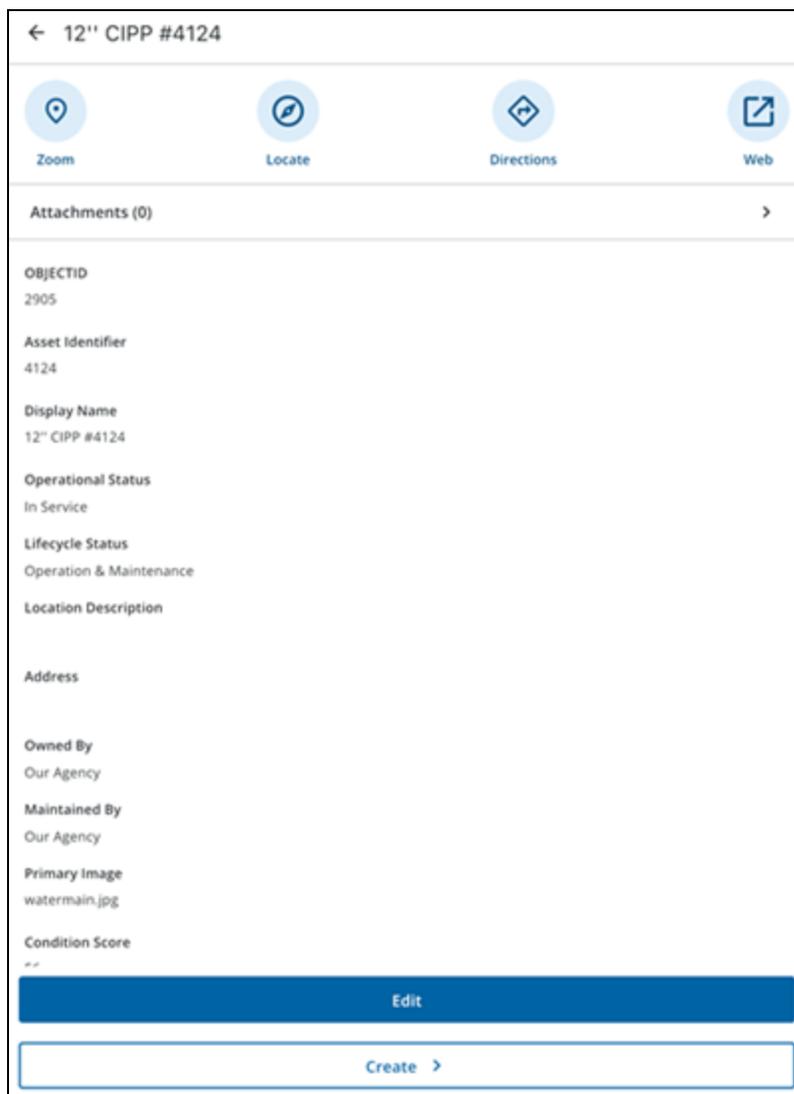
Asset Details

You can view asset details and perform actions from the **Asset Details** screen.

From the map, select and open an asset to view the **Asset Details** screen. See "Select Assets on the Map" on page 86 and "Search For Assets" on page 90 for more information.

- **Zoom:** Tap to view the asset on the map.
- **Locate:** Tap to open locate for the asset.

- **Directions:** Tap to get driving directions to the asset.
- **Web:** Tap to open the asset in the web application.
- **Attachments:** Tap to view the asset attachments. This functionality is only available when connected to the internet.
- **Hierarchy:** Tap to open the asset hierarchy, if one is available.
- **Edit:** Tap to edit asset details. See "Edit GIS Feature and Asset Data " on page 163 for more information.
- **Create:** Tap to create a work activity from the asset.
 - **New Inspections:** Tap to create a new inspection.
 - **New Work Orders:** Tap to create a new work order.
 - **New Service Requests:** Tap to create a new service request.



Associated Assets

You can view and edit associated asset details.

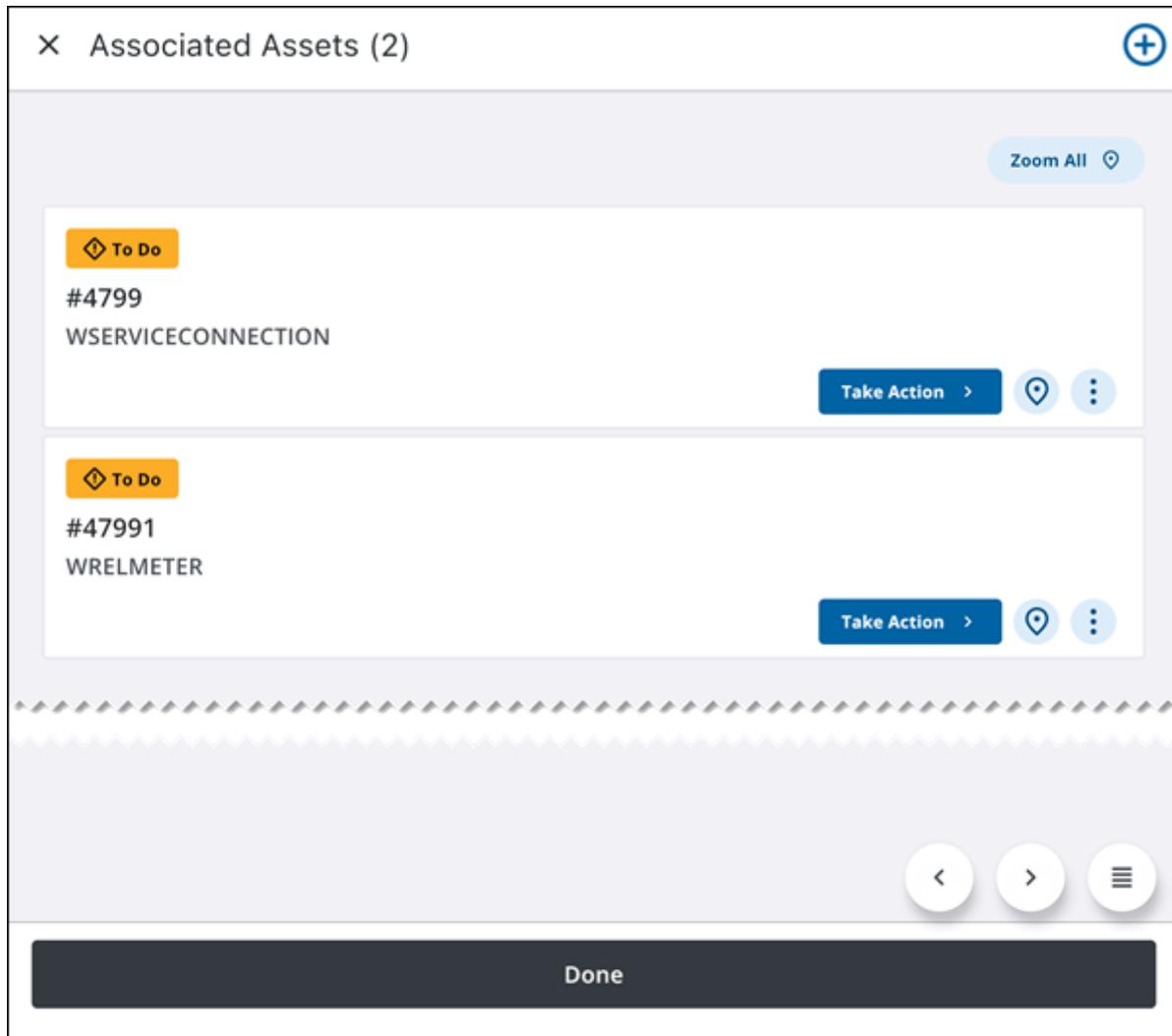
Associated Assets

You can view assets associated to a work activity.

1. Tap a work activity.
2. Tap **Associated Assets**.

Any assets associated with the work activity appear in the list.

- **Add** icon: Tap to select and add an associated asset to the list from the map.
- **Zoom All**: Tap to zoom to all associated assets on the map.
- **Take Action**: Tap to take action to progress the workflow.
 - **Complete**: Tap to complete the work activity for the associated asset.
 - **Create Related Inspection**: Tap to create a related inspection for the asset.
 - **Create Related WorkOrder**: Tap to create a related work order for the asset.
 - **Create Related Service Request**: Tap to create a related service request for the asset.
- **Map** icon: Tap to view the associated asset on the map.
- **More** icon: Tap to access more actions.
 - **View Asset Details**: Tap to view the asset details.
 - **Directions**: Tap to open driving directions to the associated asset.
 - **Locate**: Tap to open advanced locate for the associated asset.
 - **Web**: Tap to open the associated asset in the web application.



Associated Asset Details

You can view and edit the details of associated assets. This feature shows the attribute details of the associated assets.

 **NOTE:** Tap the **More** icon, then tap **Web** to view asset work history. See "Open In Web" on page 125 for more information.

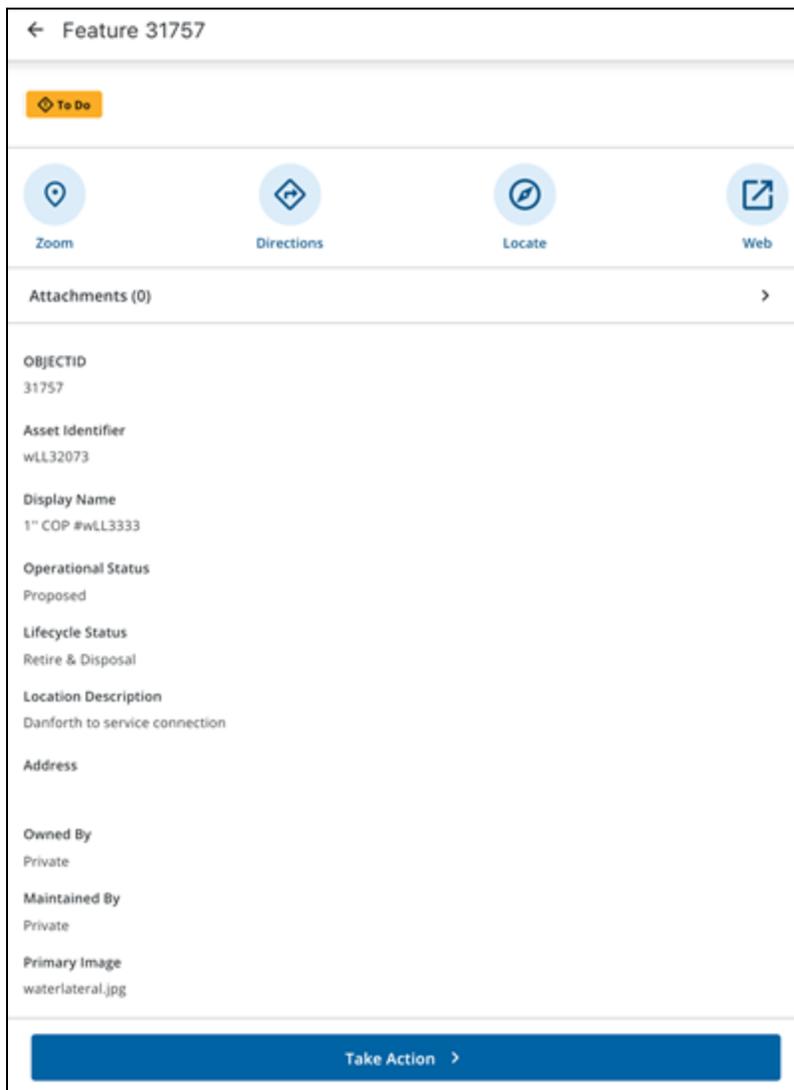
1. Tap a work activity.
2. Tap **Associated Assets**.

Any assets associated with the work activity appear in the list.

3. Tap an associated asset.

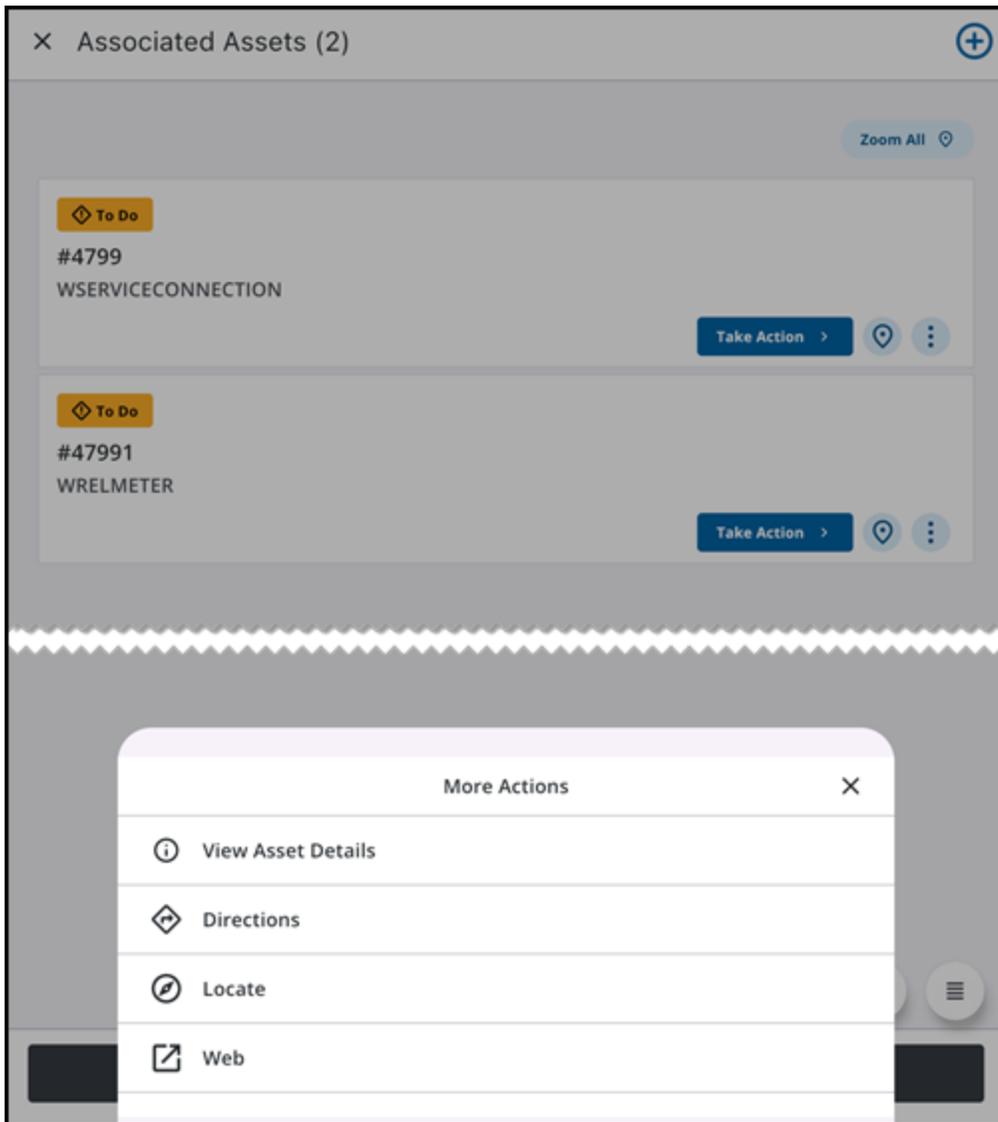
The **Asset Details** screen appears. Scroll to view all details.

- **Zoom:** Tap to view the associated asset on the map.
- **Locate:** Tap to open advanced locate for the associated asset.
- **Directions:** Tap to get driving directions to the associated asset.
- **Web:** Tap to open the associated asset in the web application.
- **Attachments:** Tap to view the associated asset attachments.
- **Hierarchy:** Tap to open the associated asset hierarchy, if one is available.
- **Take Action:** Tap to access more actions for the associated asset.
 - **Edit:** Tap to edit the associated asset details.
 - **Complete:** Tap to complete the work activity for the associated asset.
 - **Create Related Inspection:** Tap to create a related inspection.
 - **Create Related WorkOrder:** Tap to create a related work order.
 - **Create Related Service Request:** Tap to create a related service request for the asset.



Take Action
Edit
Complete
Create Related Inspection
Create Related WorkOrder
Create Related Service Request

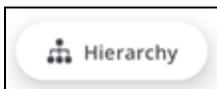
 **NOTE:** You can also access the **Asset Details** screen by tapping the **More** icon, then tapping **View Asset Details**.



Asset Hierarchy

You can view the asset hierarchy for a selected asset that has child assets or a hierarchy associated with it.

1. Tap **Hierarchy**.



The **Hierarchy** panel opens.

2. Tap the check box to select one or more assets.

- **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
 - **Web**: Tap to open the asset in the web application.
- **Create Related Activity**: Tap to create a new inspection, work order, or service request for the asset.

View Associated Assets on the Map

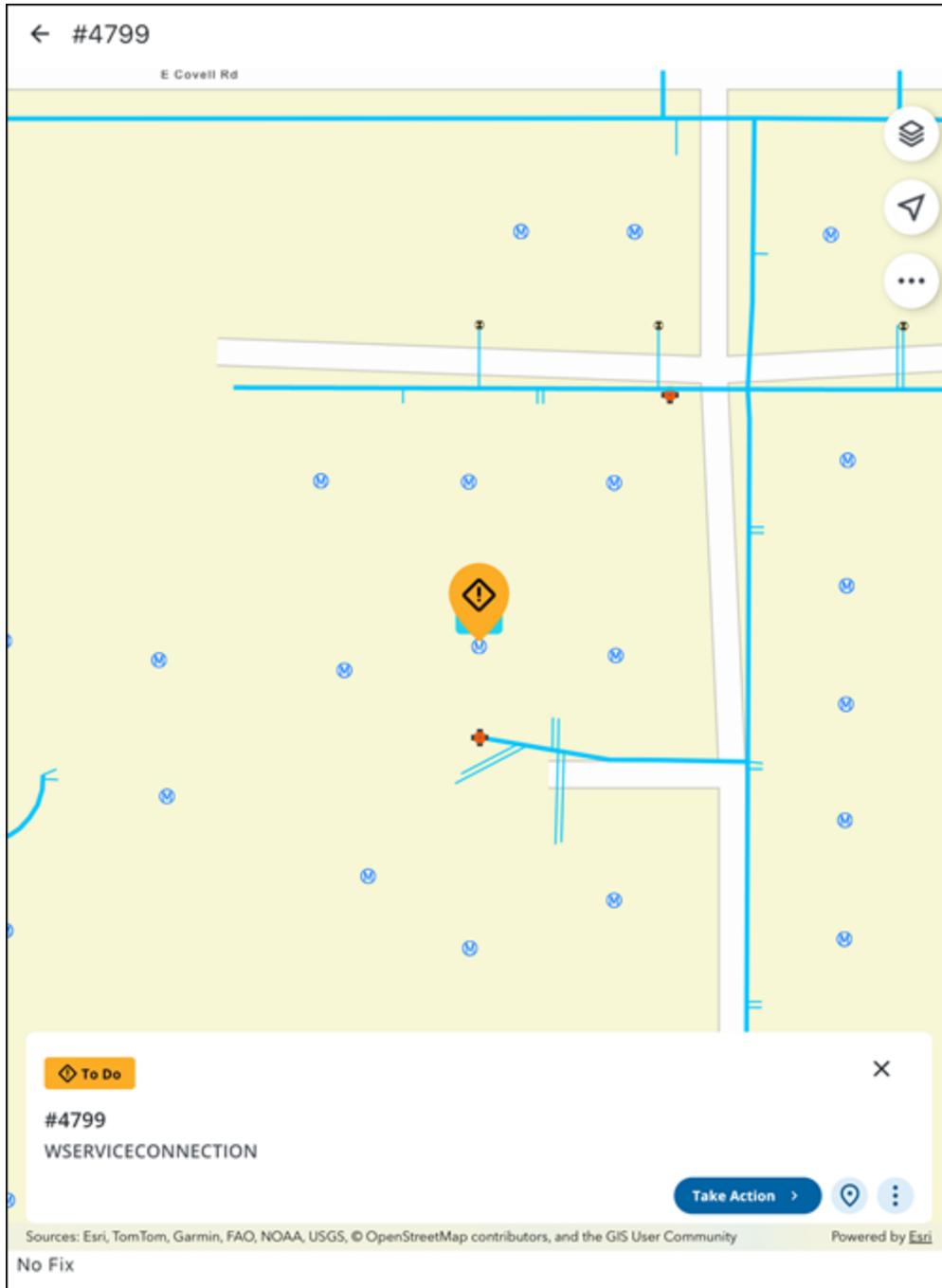
You can view associated assets on the map.

Associated assets and related work activities appear as icons on the map that dynamically update as actions are taken, providing a clear visual representation of progress and remaining tasks. This streamlines workflows by allowing users to quickly identify and take action on related activities and associated assets directly from the map.

1. Tap a work activity.
2. Tap **Associated Assets**.
3. Tap **Zoom All** to zoom to all associated assets or tap the **Map** icon to view a single associated asset.

The map zooms to the associated asset. The associated asset icon displays its status.

- **Asset Card**: Tap the card to return to the associated asset details screen.
- **Take Action**: Tap to take action on the associated asset.
 - **Create Related Inspection**: Tap to create a related inspection.
 - **Create Related WorkOrder**: Tap to create a related work order.
 - **Create Related Service Request**: Tap to create a related service request for the asset.
- **Map** icon: Tap to zoom to the associated asset.
- **More** icon: Tap to view more actions.
 - **Directions**: Tap to get directions to the associated asset. See "Go To Work Location" on page 131 for more information.
 - **Locate**: Tap to locate the associated asset on the map. See "Locate Assets Using Locate" on page 129 for more information.
 - **Web**: Tap to open the asset in the web application.



Location-Based Work Activities

You can create, view, and edit location-based work activities.

Create Location-Based Work Activities

A location-based work activity is associated with a specific location on the map.

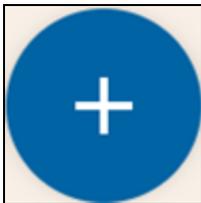
 **NOTE:** The selected work activity type determines which activities you can create or search. For example, selecting the **Service Requests** work activity type allows you to create new service requests and search existing ones. See "View Work Activity Lists and Summary Cards" on page 41 for more information.

Complete one of the following to create a location-based work activity:

From the Create Work Activity Panel

You can create a work activity using the **Add** icon.

1. Tap the **Add** icon.



The **Add** panel opens.

2. Tap the desired work activity to create.
3. Select an **Asset Group**.
4. Select an **Asset Type**.
5. Select a work activity **Template**.

The **Create Work Activity** panel appears.

6. Tap **Location** to enter any location details. The following options are available from the **Location** page:
 - **Address:** Tap to enter an address for the work activity.
 - **Facility Id:** Tap to enter a Facility Id for the work activity.
 - **Level Id:** Tap to enter a Level Id for the work activity.
 - **Capture:** Tap to capture the work activity location. See "Quick Capture a Work Activity Location Using GNSS" on page 105 for more information.
 - **Map:** Tap to select a location on the map. See "Manually Digitize a Work Activity Location from the Map" on page 106 for more information.
 - **Clear:** Tap to clear the selected location.
 - **Details:** Tap to view location details.

✕ Location

Address

Facility Id

Level Id

Location *


 Capture


 Map


 Clear

Longitude	-10854343.811795
Latitude	4254870.096927
H. Acc.	
V. Acc.	
H. MSL	

[Details](#)

<

>

☰

GPS H:35m V:5.1m

Done

7. Tap **Done**.
8. Enter any other desired information.
9. Tap **Save**.

The location-based work activity is created.

From the Map

You can define your selection area with a box or by tapping on the map. See "Select Assets on the Map" on page 86 for more information.

1. Tap the **Select** icon.
2. Tap and drag across the map to draw a box. Any selectable assets in that area are selected and appear on the **Assets** panel.
3. Tap the check box to select one or more assets.
4. Tap **Create**.



5. Tap the desired work activity to create.
6. Select the work activity template.

NOTE: If you have selected incompatible assets, a message appears asking you to remove them. Tap **Remove** to remove the incompatible assets and continue creating a work activity.

A message appears asking if you would like to create a work activity for each asset or all assets.



7. Select an option.

- **Each Asset:** Tap to create separate work activities for each selected asset.
- **All Assets:** Tap to create a work activity for all selected assets.

The **Create Work Activity** panel appears.

8. Tap **Location** to enter any location details. The following options are available from the **Location** page:
 - **Address:** Tap to enter an address for the work activity.
 - **Facility Id:** Tap to enter a Facility Id for the work activity.
 - **Level Id:** Tap to enter a Level Id for the work activity.
 - **Capture:** Tap to capture the work activity location. See "Quick Capture a Work Activity Location Using GNSS" below for more information.
 - **Map:** Tap to select a location on the map. See "Manually Digitize a Work Activity Location from the Map" on the facing page for more information.
 - **Clear:** Tap to clear the selected location.
 - **Details:** Tap to view location details.
9. Tap **Done**.
10. Enter any other desired information.
11. Tap **Save**.

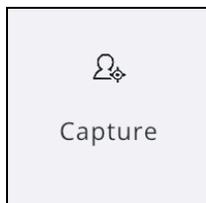
The location-based work activity is created.

Quick Capture a Work Activity Location Using GNSS

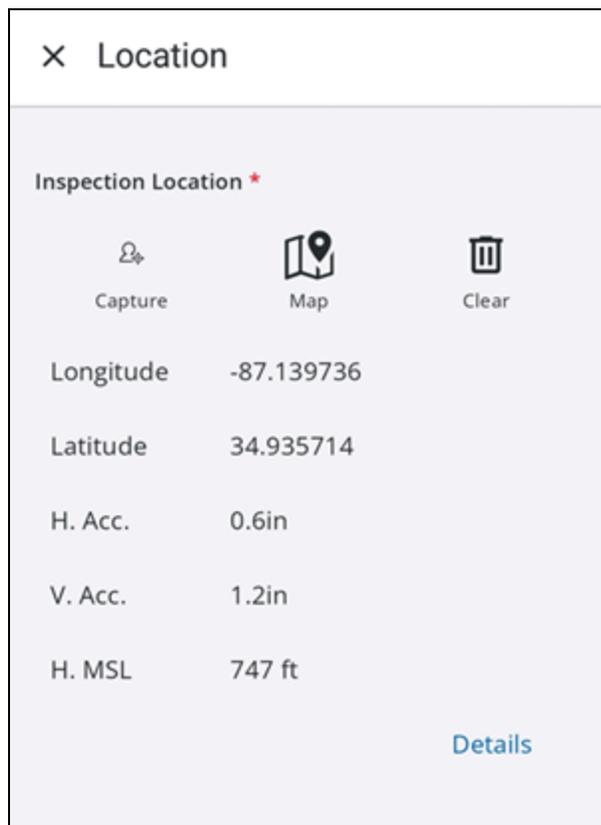
You can quick capture a work activity location using your GNSS position.

 **NOTE:** If an external GNSS receiver is not connected, the location is captured based on your device's internal GPS. See "Connect to the GNSS Receiver" on page 26 for more information on connecting a GNSS receiver and ensuring the most accurate capture.

1. Open a work activity.
2. Tap **Location**.
3. Tap **Capture**.



The GNSS location is captured. Once the location is captured, relevant GNSS metadata fields (e.g., accuracy, fix type, date/time) are automatically saved and populated.



The screenshot shows a mobile application interface for capturing a location. At the top, there is a title bar with a close button (X) and the text 'Location'. Below this is a section titled 'Inspection Location' with a red asterisk. Underneath are three icons: a person with a location pin (labeled 'Capture'), a map with a location pin (labeled 'Map'), and a trash can (labeled 'Clear'). Below these icons is a list of metadata fields:

Longitude	-87.139736
Latitude	34.935714
H. Acc.	0.6in
V. Acc.	1.2in
H. MSL	747 ft

At the bottom right of the panel, there is a blue link labeled 'Details'.

Manually Digitize a Work Activity Location from the Map

You can collect and update work activity location data in the field by manually adding a point to capture a location.

Capture Location for a Work Activity

You can capture the location for a work activity.

1. Open a work activity.
2. Tap **Location**.
3. Tap **Map**.

The **Capture Location** panel opens to your current location on the map.

4. Add a point.
5. Tap **Add Location**.

The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.

Capture Location Panel

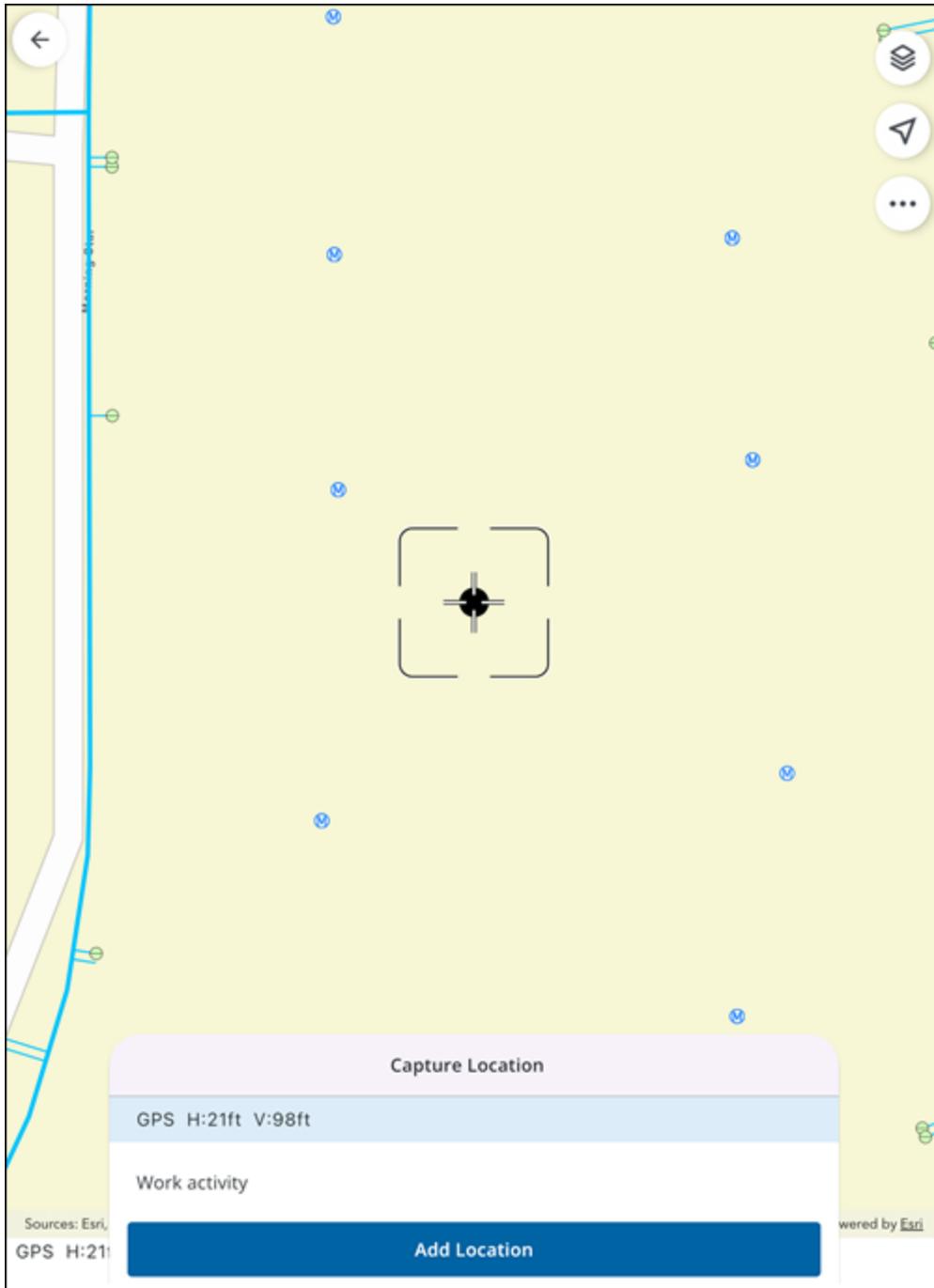
The **Capture Location** panel allows you to manually add a point on the map. It also provides tools to guide your capture process.

1. With the **Capture Location** panel open, tap and drag on the map.

A reticle appears on the map, providing a guide for where a point will be placed.

The following options are available on the **Capture Location** panel:

- Tap on the map to add a point.
- **Add Location**: Tap to add a location and return to the **Location** page.
- **Undo**: Tap to undo your last action.
- **Clear**: Tap to clear the point.



Locate a Work Activity Address

You can search and filter work activities by the address. If a work activity does not have an address associated to it, you can add one. Additionally, you can get driving directions to the work activity.

✓ PREREQUISITES:

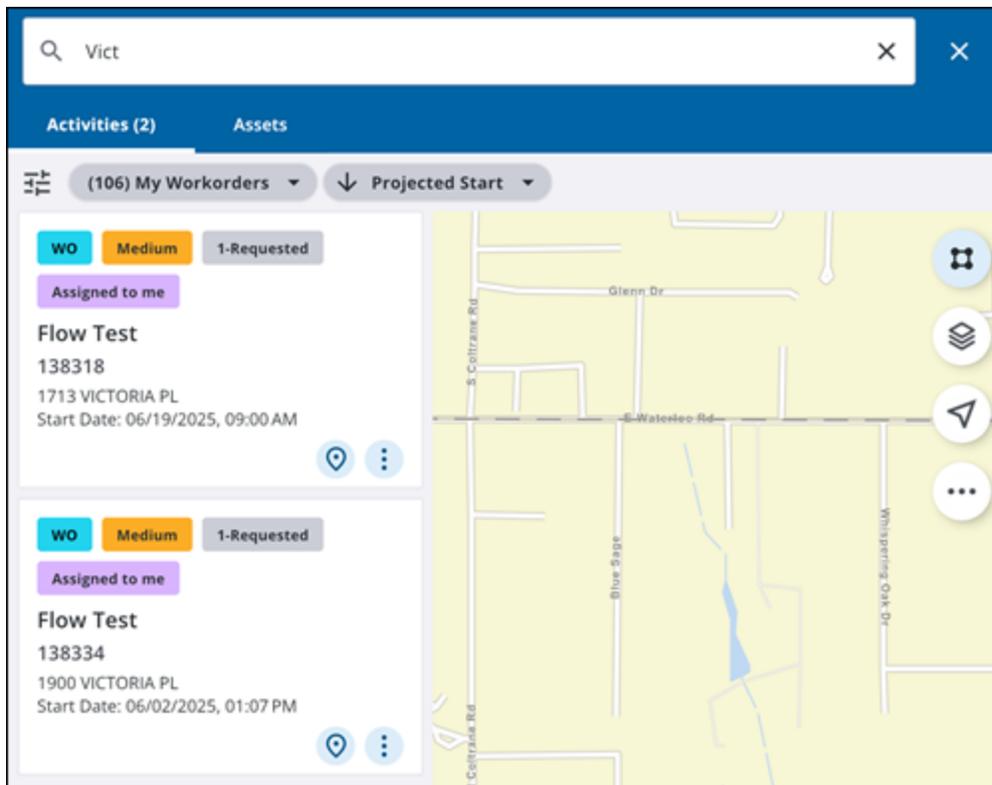
- To search for spatial and non-spatial assets or addresses in the app (both online and offline), you must first set up search functionality for your web map. This is done by configuring which layers and tables are searchable in your ArcGIS Online or ArcGIS Enterprise portal. See [Configure feature and table search for maps](#) in the ArcGIS Online documentation for more information.

Search for an Address

You can search for work activities that have addresses associated to them.

NOTE: If an address is manually typed in and not geocoded, it is still searchable within the activity list. An address must be associated with a work activity to search using the address.

1. Tap the **Search** icon.
2. Enter the address into the search bar.
3. Select the desired work activity that appears in the **Activities** list.



View or Add an Address

You can view or add an address to a work activity.

1. Open a work activity.
2. Tap **Location**.
3. View or enter the work activity address.
4. Tap **Done**.

× Location

Address

Facility Id

Level Id

Location *

Capture Map Clear

Longitude -10854343.811795

Latitude 4254870.096927

H. Acc.

V. Acc.

H. MSL

Details

GPS H:35m V:5.1m

Done

Get Driving Directions to a Work Activity Address

You can get driving directions to a work activity address.

1. Open a work activity.
2. Tap **Directions**.

The app opens your device's default map application with directions to the work activity location.

Weather Data

You can automatically enter weather data based on your current location when connected to the internet, ensuring that inspection observations are consistently populated with accurate, real-time weather information which improves efficiency and supports informed decision-making. When not connected to the internet, you can manually enter in weather information.

✓ PREREQUISITES:

- You must grant location permissions to automatically populate weather data based on their location.
- You must be connected to the internet to get automatically populated weather data.
- The weather section shows only on linear inspections that have one or more mapped weather data fields configured in the inspection template. These data fields must be configured while setting up the inspection observation template in Trimble Unity Admin.

Configure Weather Fields Template in Trimble Unity Admin

In order to populate weather data automatically in Trimble Unity Field, you must first configure an inspection observation template in Trimble Unity Admin. See [Add or Edit a Custom Inspection Template](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

1. In Trimble Unity Admin, click **Configure** and click **Work Activity Templates**.
2. Select **Inspection Template**.
3. Click **Add record** to add a new template.
4. Enter the **Name** and **Description** for the template and click **Add**.

The new inspection observation template displays in the **Work Activity Templates** panel.

After the inspection observation template has been created, configure an entity to the custom inspection template. This allows an asset to be associated with the inspection observation template. See [Configure Entities on Custom Inspection Templates](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

5. Click the **General** tab on the **Template Details** panel. To add a new entity, click **Add record** under **Apply to Entities**.
6. Select the **Entity Group** and **Entity Type** and click **Add**.

The entity now appears under **Apply to Entities**.

7. On the **General** tab of the **Template Details** panel, select **Linear** from the **QA Model** drop-down list. See [Add a Linear Observation](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
8. Click **Observations**.
9. To add an observation, click **Add Observation**.
10. Enter the **Observation** and click **Add**.
11. Select the observation and enter the **Observation Details** exactly as shown in the table below for the desired weather fields.
 - **Observation**: Enter the name of the weather field. This will appear in the Trimble Unity Field app as the weather field name.
 - **Description**: Enter the description exactly as shown in the table into the field.
 - **Answer Type**: Select **Single Answer** from the drop-down list.
 - **Observation Answers**: Click the **Add** icon to add an observation answer from the drop-down list. The observation answer determines the answer type that can be entered in the weather field. For example, a **Free-form response** allows you to enter **Cloudy**, while a **Numeric** answer allows you to enter **75**.

Observation Details

Observation 41 / 250

Current Weather Temperature in Fahrenheit

Description 15 / 256

Weather_Temp_F

Answer Type Observation Id 12437 Weight 0

Calc. Condition Score Required

All Answers Visible [Add Condition](#)

Observation Answers

	Score
<input type="checkbox"/> Answer = Numeric	0

+

⚠ IMPORTANT: The **Description**, **Answer Type**, and **Observation Answers** fields must be entered exactly as shown for the weather fields to display in the app.

Observation	Description	Answer Type	Observation Answers
Weather Location - City	Weather_ Location_city_ state	Single Answer	Free-form response
Weather Location - Zip	Weather_ Location_zip	Single Answer	Free-form response
Temperature - Fahrenheit	Weather_Temp_F	Single Answer	Numeric

Temperature - Celcius	Weather_Temp_C	Single Answer	Numeric
Low/High Temperature - Fahrenheit	Weather_Temp_LowHigh_F	Single Answer	Numeric
Low/High Temperature - Celcius	Weather_Temp_LowHigh_C	Single Answer	Numeric
Conditions	Weather_Conditions	Single Answer	Free-form response
Precipitation - Inches	Weather_Precipitation_Inches	Single Answer	Numeric
Precipitation - Percent	Weather_Precipitation_Percent	Single Answer	Numeric
Humidity	Weather_humidity	Single Answer	Numeric
Wind Speed (MPH)	Weather_WindSpeed_MPH	Single Answer	Numeric
Wind Speed (KPH)	Weather_WindSpeed_KPH	Single Answer	Numeric
Wind Direction	Weather_WindDirection	Single Answer	Free-form response

Automatically Enter Weather Data

Once the fields are configured in Trimble Unity Admin, you can automatically enter weather data to an inspection observation in the app.

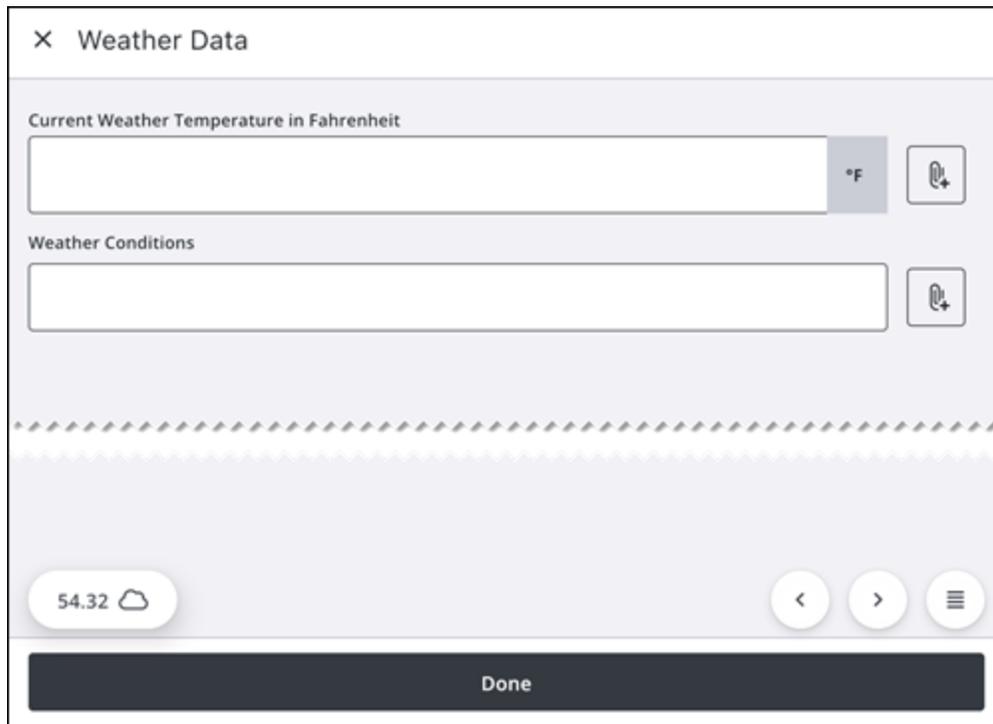
1. With **Inspections** selected as the **Activity Type**, tap the **Create** icon on the map in Trimble Unity Field.
2. Select an **Asset Group**.
3. Select an **Asset Type**.
4. Select the **Inspection Template** that is configured for weather fields.

 **IMPORTANT:** The **Asset Group** and **Asset Type** selected determine the options that appear in the **Inspection Templates** list. If you do not see the inspection observation template configured with weather fields, then you must configure an entity to the inspection observation template.

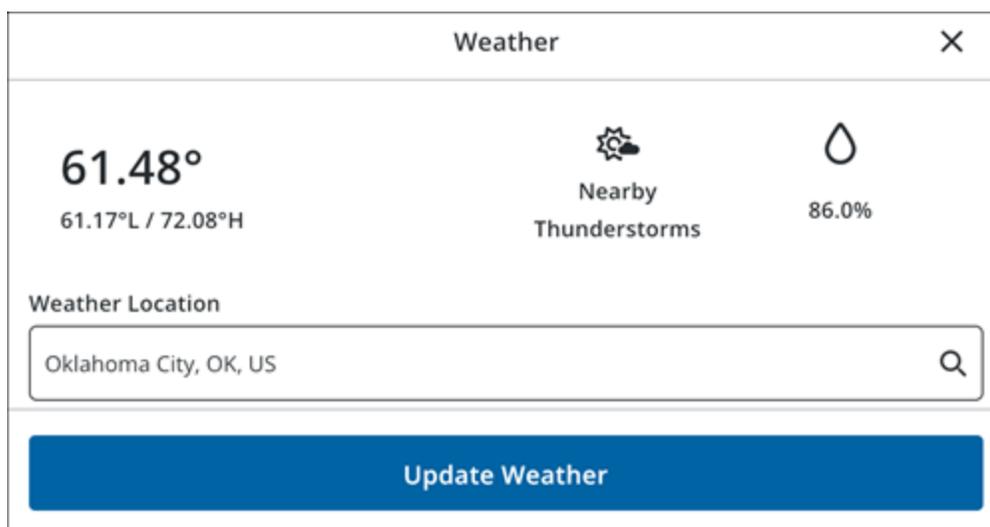
5. On the **Create Inspection** page, tap **Weather Data**.

The current weather for your location displays in the **Weather Widget**.

NOTE: If your device is not connected to the internet, a message appears informing you that you are offline and cannot access the current weather. To automatically update your current weather, reconnect to the internet.



6. Tap the **Weather Widget**.



7. To automatically populate the current weather data into the fields, tap **Update Weather**.

The weather fields update with the current weather.

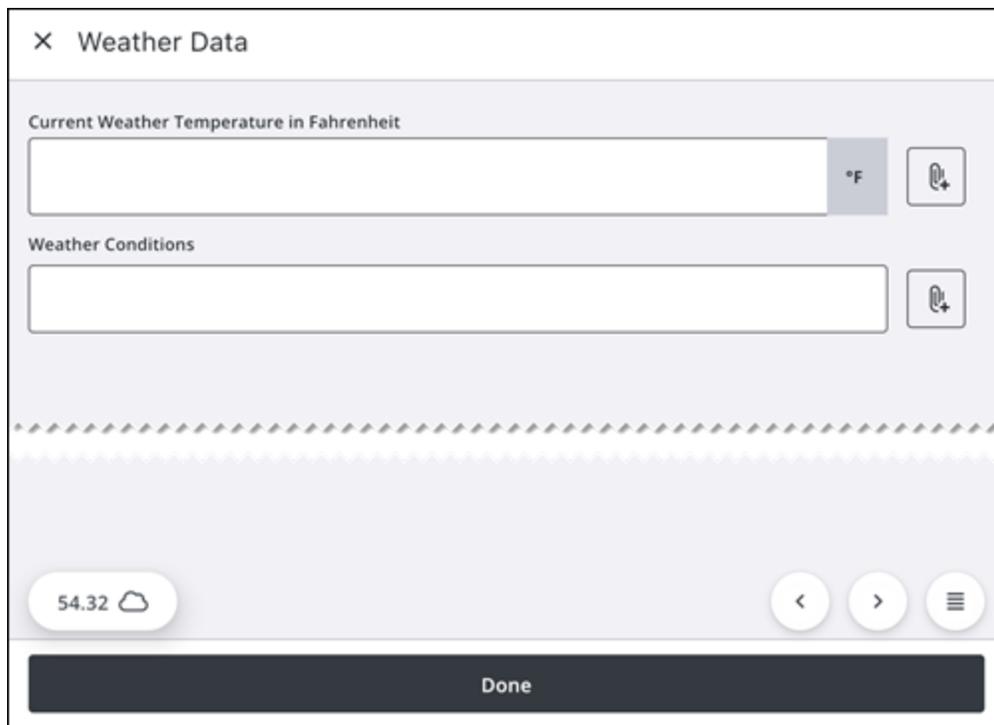
Manually Enter Weather Data

If your device is not connected to the internet, you can manually enter weather data into an inspection observation using the app.

1. With **Inspections** selected as the **Activity Type**, tap the **Create** icon on the map in Trimble Unity Field.
2. Select an **Asset Group**.
3. Select an **Asset Type**.
4. Select the **Inspection Template** that is configured for weather fields.

⚠ IMPORTANT: The **Asset Group** and **Asset Type** selected determine the options that appear in the **Inspection Templates** list. If you do not see the inspection observation template configured with weather fields, then you must configure an entity to the inspection observation template.

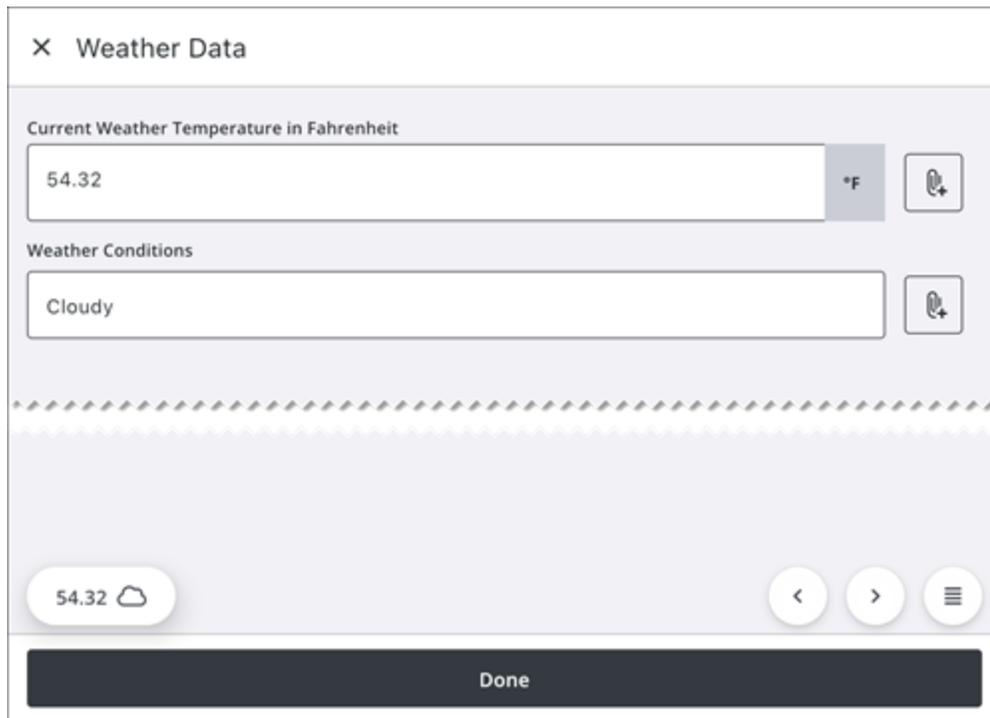
5. On the **Create Inspection** page, tap **Weather Data**.
6. Tap the fields to edit the current weather data. For example, tap **Weather Conditions** and enter **Sunny**.
7. Tap the **Attach** icon to add an attachment if desired.



The screenshot shows a mobile application interface for entering weather data. At the top, there is a title bar with a close icon (X) and the text "Weather Data". Below the title bar, there are two input fields. The first field is labeled "Current Weather Temperature in Fahrenheit" and contains a text input area with a unit selector set to "°F" and a small icon to its right. The second field is labeled "Weather Conditions" and contains a text input area with a small icon to its right. Below these fields, there is a dashed horizontal line. At the bottom of the screen, there is a navigation bar with a button labeled "54.32" and a cloud icon, and three circular icons: a back arrow, a forward arrow, and a menu icon. A dark bar at the very bottom contains the text "Done".

8. Tap **Done**.

The weather fields update.



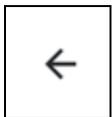
Work Activity Drafts

Work activities can be saved as drafts until you have all of the information required to validate data before syncing and saving. Depending on your internet connection, drafts can be stored locally or on the cloud.

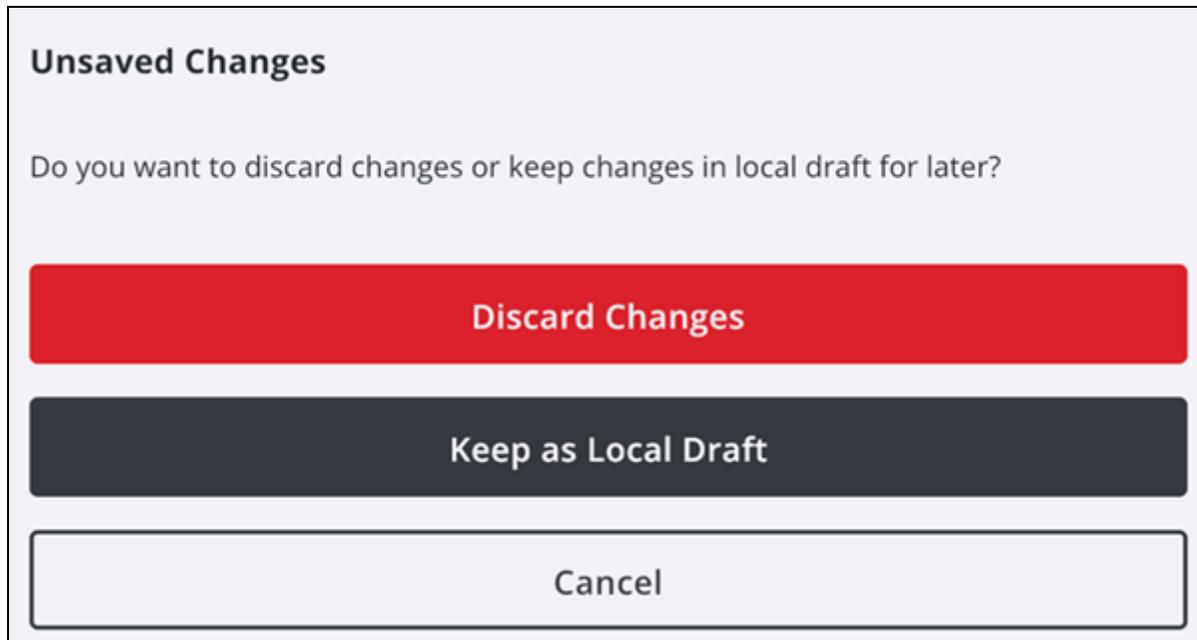
Save Work Activity As Local Draft

You can save a work activity as a local draft on your device when you are not able to connect to the internet.

1. Tap the **Back** icon to exit a work activity without saving changes.



A message appears asking to confirm if you want to discard the changes, keep the changes in a local draft for later, or cancel the operation.



2. Tap **Keep as Local Draft**.

The work activity appears in the work activities list with the **Local Draft** tag on the summary card.

 **NOTE:** If an issue occurs and you are unable to manually save as a local draft during the creation of a work activity, the work activity is automatically saved as a local draft.

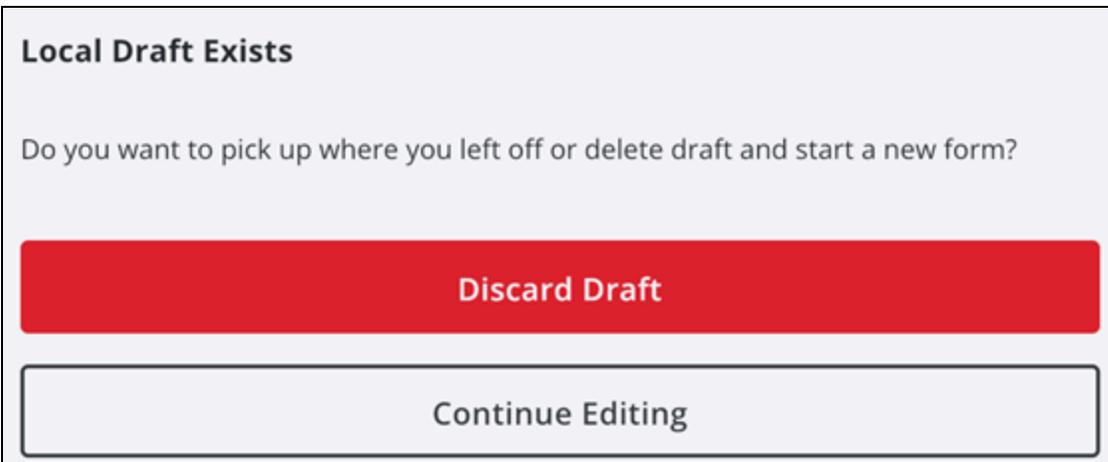
Discard a Local Draft Work Activity

You can discard a local draft work activity.

From a Work Activity

1. Tap on a local draft.

A message appears asking if you would like to continue editing or discard the local draft.



2. Tap **Discard Draft** to delete the draft.

The local draft is discarded.

From the Work Activity List

1. On a **Local Draft** summary card, tap the **More** icon.
2. Tap **Discard Local Draft**.



The local draft is discarded.

Update Work Activities

When a work activity is created, you can perform various activities such as collecting data, adding costs, uploading attachments, and linking other work activities.

Forms

You can fill out configurable smart forms during the data collection process for work activities. Required fields ensure that information is captured correctly and thoroughly.

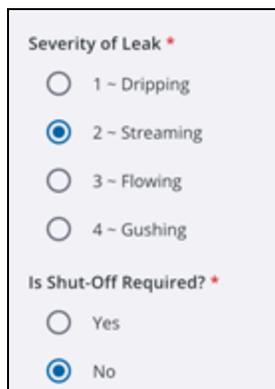
Different forms available include:

- **Default Values on Forms:** Default values are automatically populated on the form.
- **Represent Fields Based on Predefined Conditional Rules:** Required fields can be shown or hidden based on predefined conditional rules.
- **Validate Required Fields:** When required fields are not populated, a prompt appears to inform the user that the field is required to continue.
- **Calculate Value Automatically:** Values are calculated automatically based on values entered by the user.
- **Calculate Condition Scoring Automatically:** Conditions are calculated automatically based on the calculated scores entered by the user.

Required Field

Required fields are indicated with a red asterisk.

Required fields must be completed.



The screenshot shows a form with two required fields. The first field is "Severity of Leak" with a red asterisk, and the second is "Is Shut-Off Required?" with a red asterisk. Both fields have radio button options.

Severity of Leak *

1 - Dripping

2 - Streaming

3 - Flowing

4 - Gushing

Is Shut-Off Required? *

Yes

No

Drop-Down List Field

A drop-down list field allows the user to select an option from a drop-down list.

1. Tap the drop-down list field.

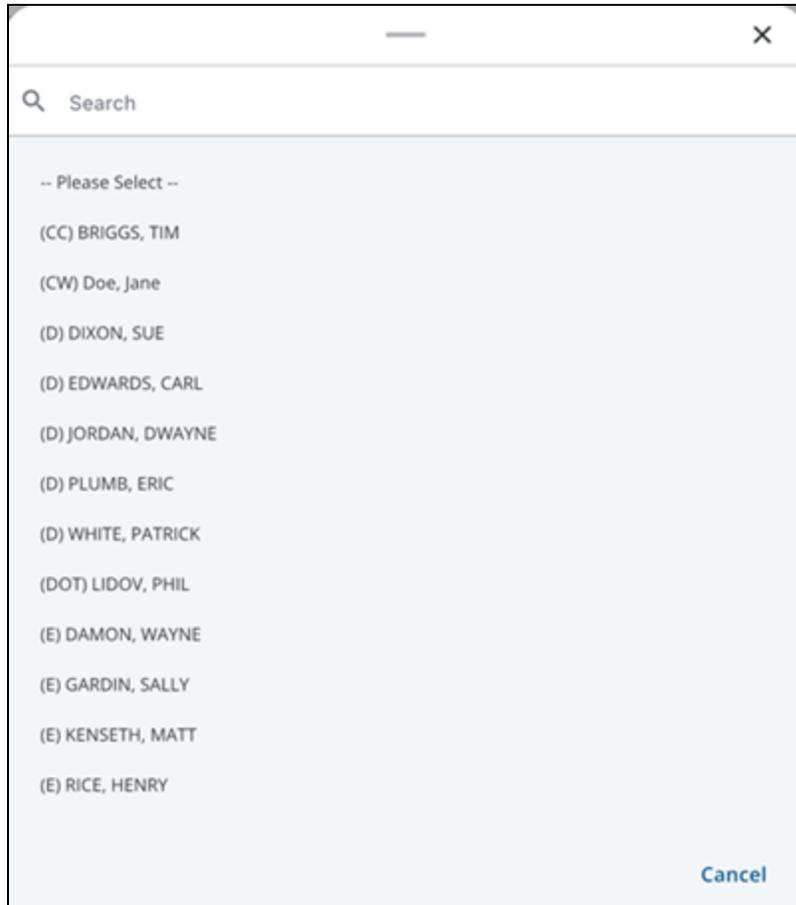


The screenshot shows a drop-down list field with the label "Submit To". The selected option is "(w) Cotter, Mike".

Submit To

(w) Cotter, Mike

2. Select an option from the list.



The field updates.

Radio Button Field

A radio button field allows users to select one answer from a list of options.

1. Tap a radio button to select an option.

A filled radio button indicates it has been selected.

Severity of Leak *

1 ~ Dripping

2 ~ Streaming

3 ~ Flowing

4 ~ Gushing

Is Shut-Off Required? *

Yes

No

Date and Time Field

A date and time field allows the user to select a date and/or time for the field.

1. Tap a date and time field.
2. Select a date from the **Select date** panel. Tap **Confirm**. Tap the **Pencil** icon to input a date via the keyboard.

Select date

Aug 15, 2024 

August 2024  < >

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

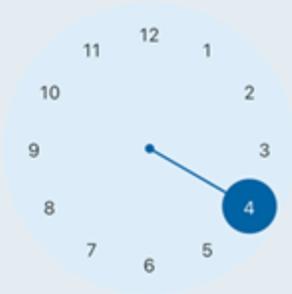
Cancel Confirm

3. Select a time from the **Select time** panel. Tap **Confirm**.

Select time

04 : 52 

AM
PM



Cancel Confirm

The field updates.

Text Field

A text field allows users to input data via their keyboard.

1. Tap the text field.

Your device's keyboard appears.

2. Enter in your desired text.

A screenshot of a mobile application interface showing a text input field. The field is labeled "Recommendations" at the top left. The field itself is empty and has a light gray border.

3. Tap **Done** on your keyboard.

The field updates.

Comments Field

A comments field allows users to add additional comments to a work activity.

1. Next to the comments field, tap **Add**.

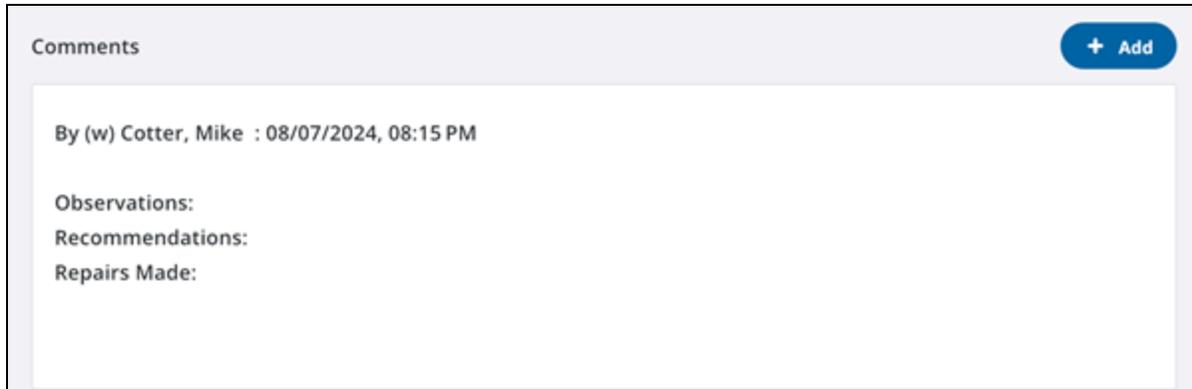
A screenshot of a mobile application interface showing a comments field. The field is labeled "Comments" at the top left. To the right of the field is a blue button with a white plus sign and the word "Add".

The **Add Comments** panel opens.

A screenshot of a mobile application interface showing the "Add Comments" panel. The panel has a title bar with "Add Comments" and a close button (X). Below the title bar is a text input field labeled "Comments" with a red asterisk. At the bottom of the panel is a dark gray button labeled "Save".

2. Tap the comments field to enter your comments.
3. Tap **Save**.

The comment appears in the field.



View and Perform a Manual Sync

You can view the current sync status and perform a manual sync with the cloud at any time.

View Sync Status

You can view the current sync status on the "App Settings" on page 23 screen.

1. Tap **Settings**.

The **Last sync** status appears under your user information.

Perform a Manual Sync from a Work Activity

You can perform a manual sync from a work activity.

1. Open a work activity.
2. Tap **Sync**.

A manual sync is performed.

Perform a Manual Sync

You can perform a manual sync using the **Sync** icon on the Top Navigation Bar.

1. Tap the **Sync** icon.



A manual sync is performed.

Open In Web

When you are viewing a work activity or selected asset in the app, you can open the corresponding item in the web application. Opening a work activity in a web application is best

experienced when using a tablet device due to the larger screen size.

★ BEST PRACTICE

For the best user experience, follow the steps below:

1. On your device, use the browser app to navigate to Trimble Unity Maintain.
2. Enter your credentials to log in to Trimble Unity Maintain. See [Log In](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
3. Tap **Respond** to launch the Respond app.
4. On your device, switch to the Trimble Unity Field app.
5. Tap **Open in Web**.

Respond opens directly to the relevant work activity or associated asset.

From a Summary Card

You can open the work activity in the web application from a summary card.

1. On a work activity summary card, tap the **More** icon.
2. Tap **Web**.

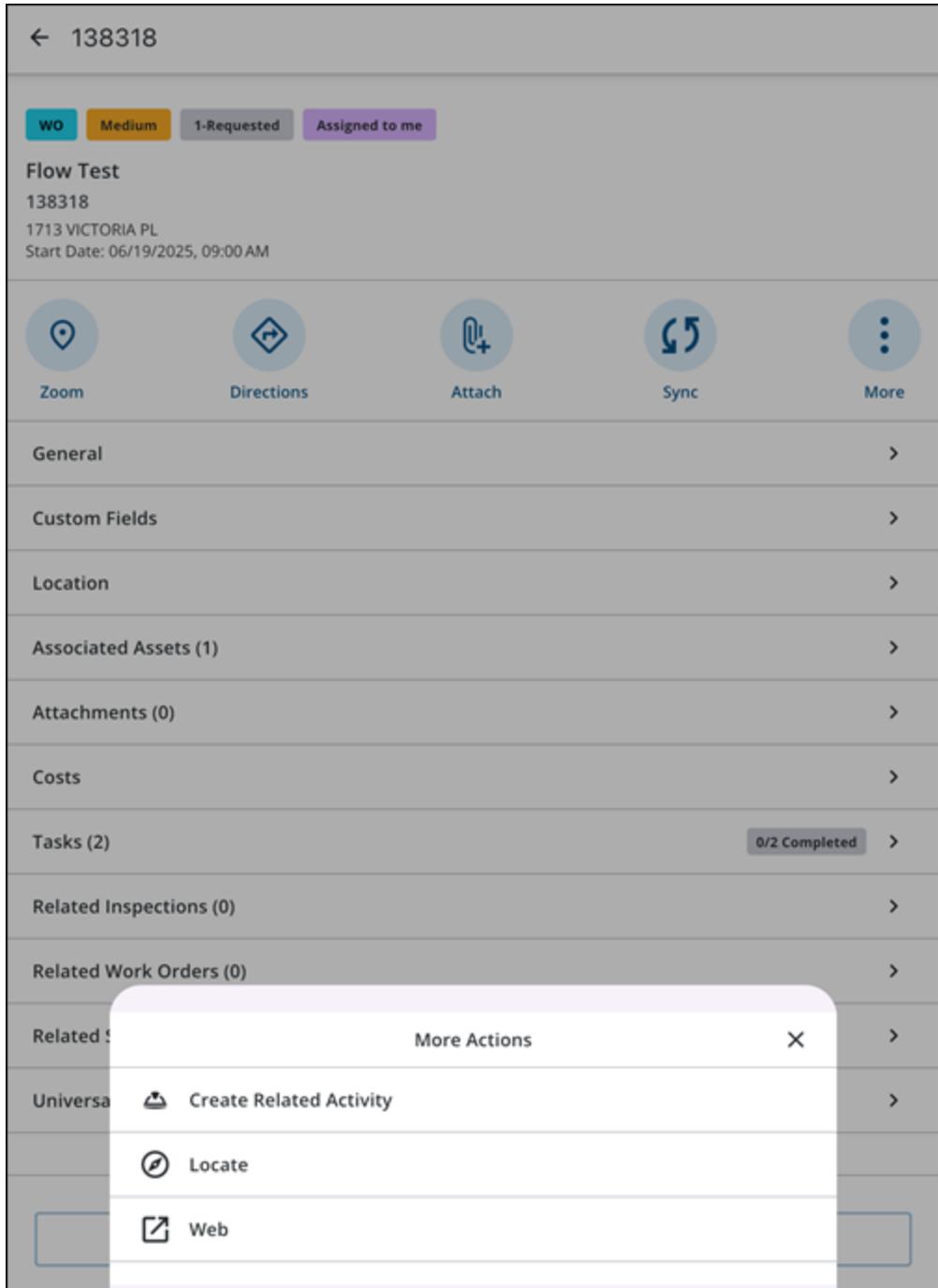


The work activity opens in the web application.

From a Work Activity

You can open the work activity in the web application from the work activity screen.

1. Open a work activity.
2. Tap **More**.
3. Tap **Web**.



The work activity opens in the web application.

Trimble Unity. Respond

Details Asset Readings Save Close Delete

Work Order

Description
Site Restoration

Number
136794

Sid
136794

Entry Type
WMAIN
Change

Category
General

Initiated Date
Aug 12, 2024 at 7:30 PM

Status
1-Requested

Priority
Medium

Supervisor
(ad) Admin, Public Works

Submit To
(w) Cotter, Mike

Submit Date
Aug 12, 2024 at 7:30 PM

Assign Work Activities

Work activities can be assigned and reassigned to users.

Assign Work Activity

You can assign a work activity.

1. Tap a work activity.
2. Tap **General**.
3. Tap **Submit To**.

A list of users appears.

4. Tap a user to assign the work activity to.

The work activity is assigned to the selected user.

Reassign Work Activity

You can reassign a work activity.

1. Tap a work activity.
2. Tap **General**.
3. Tap **Submit To**.
4. Tap a user to assign the work activity to.

The work activity is reassigned to the selected user.

Associate Existing Work Order to a Project

You can associate an existing work order to a project.

1. Open a work order.
2. Tap **General**.
3. Tap **Project**.
4. Select a project to associate the work order to.

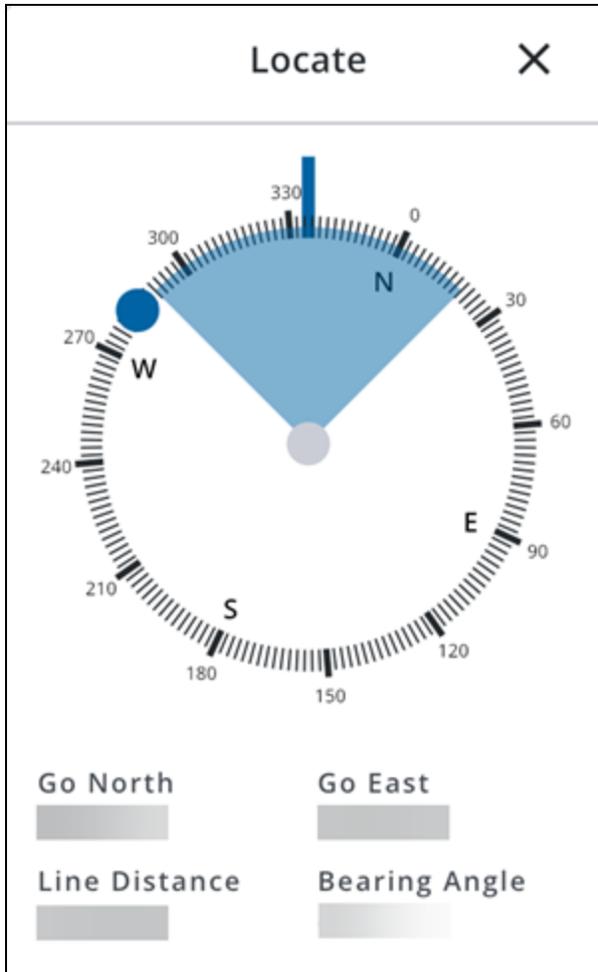
The work order is now associated with a project.

Locate Assets Using Locate

You can locate an asset using **Locate**. The **Locate** feature allows users to capture high accuracy positioning data.

1. Open a work activity.
2. Tap **Associated Assets**.
3. Select an asset.
4. Tap **Locate**.

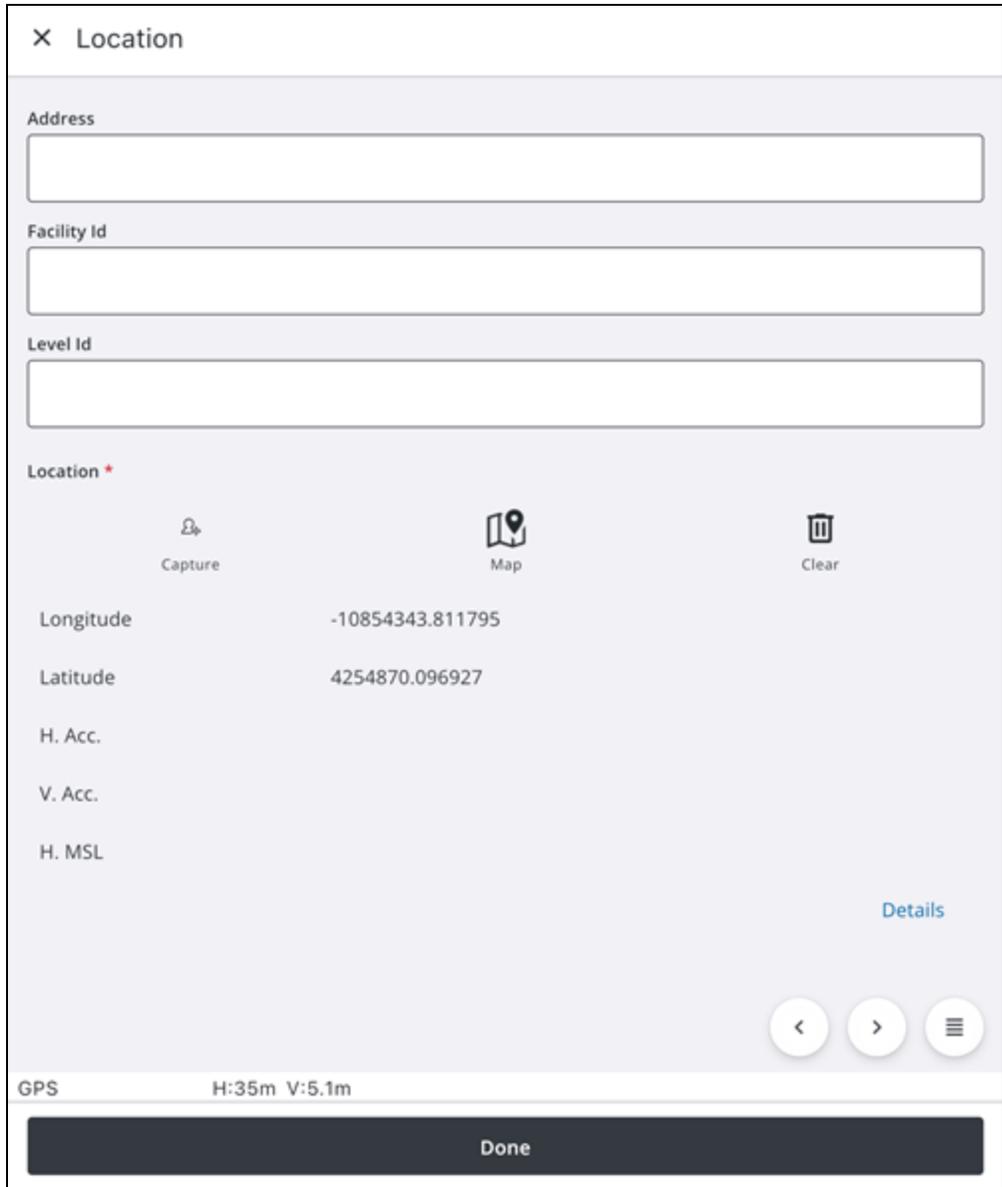
The map opens with the advanced locate view. A compass is shown with the distance and bearing to the selected asset, allowing users to navigate to the asset.



Capture Location

You can manually capture location details for work activities. GPS location metadata is captured automatically.

1. Open a work activity.
2. Tap **Location**.
3. Tap **Capture**.



The work activity location is captured using GPS.

Go To Work Location

You can get driving directions to a work location for an activity or an asset.

Get Driving Directions to the Activity Location

You can get driving directions to the activity location.

1. Open a work activity.
2. Tap **Directions**.

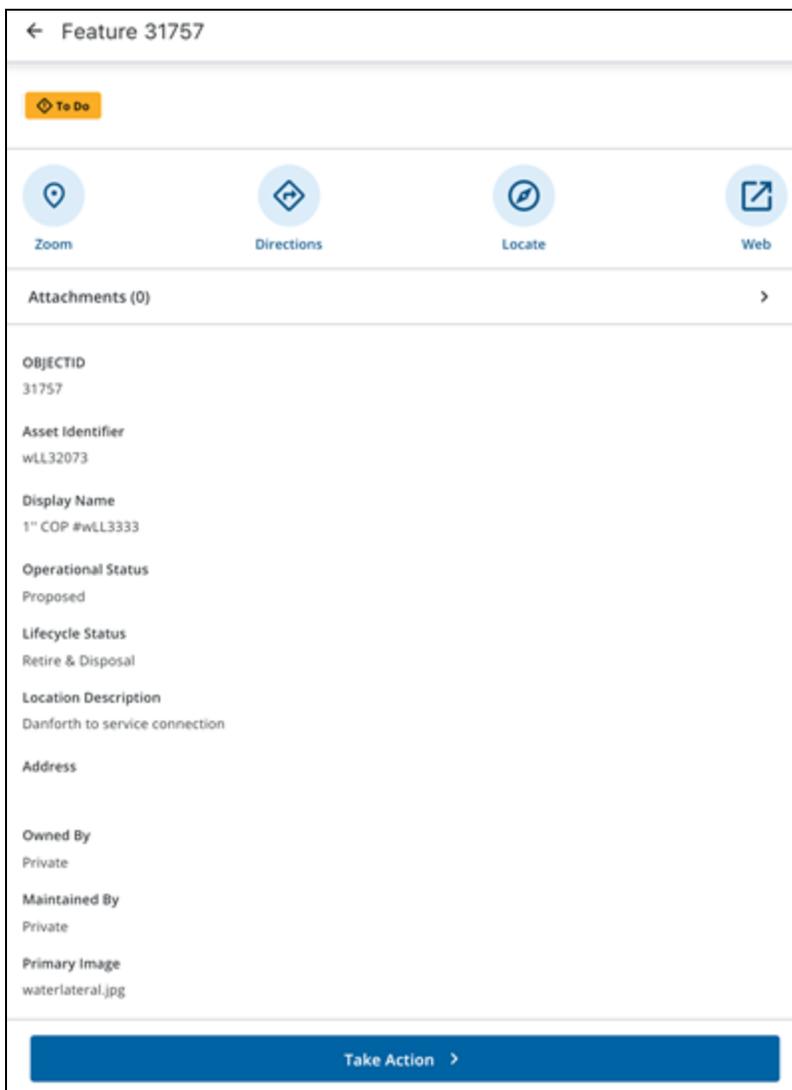


The app opens your device's default map application with directions to the activity location.

Get Driving Directions to the Asset Location

You can get driving directions to the asset location.

1. Open a work activity.
2. Tap **Associated Assets**.
3. Tap an asset.
4. Tap **Directions**.



The app opens your device's default map application with directions to the asset location.

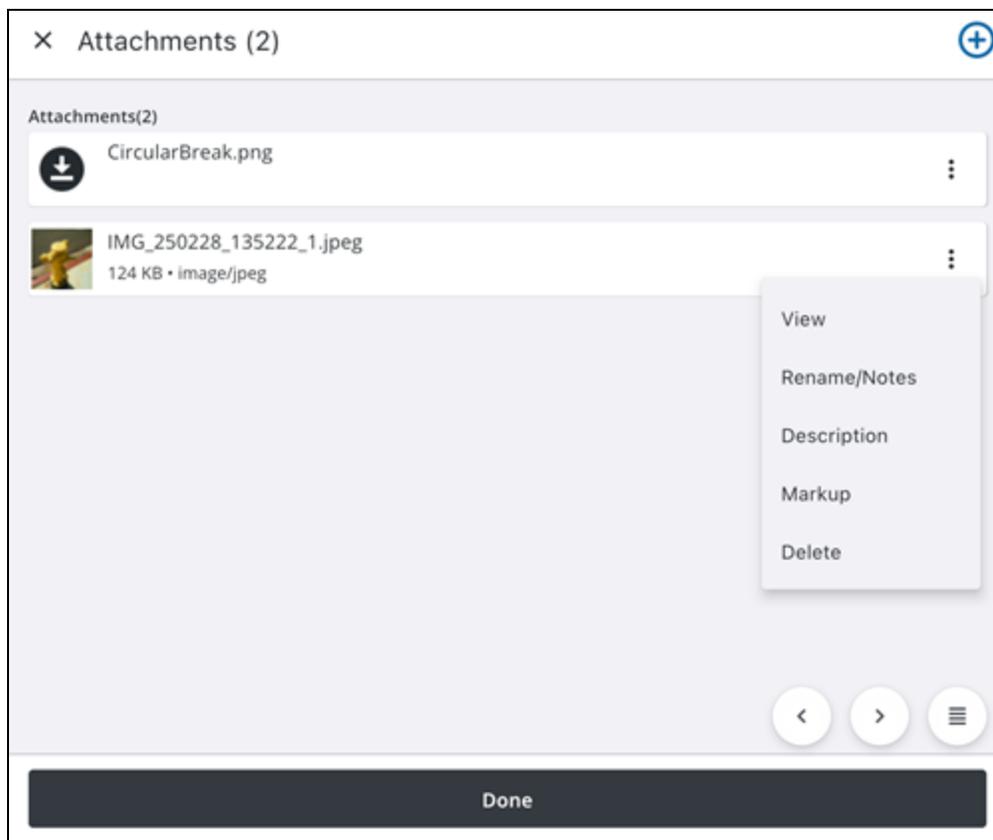
Add Attachments

You can add attachments from your device via the **Attachments** field or by tapping the **Attach** icon and associate them to a work activity or an associated asset.

Photos taken in the app display a text-based timestamp by default, allowing you to view the date and time the photo was taken to better track construction progress, fulfill legal requirements, create time-lapse sequences, and more. The timestamp remains visible even if you mark up the photo. To manage this setting, see **Media Attachments** in the "App Settings" on page 23 topic.

The following steps follow the workflow of tapping the **Attach** icon.

NOTE: Any attachments added to a local work activity draft are discarded if the local work activity draft is discarded.



Attach a Photo from the Camera

You can attach a photo taken from your device's camera to a work activity.

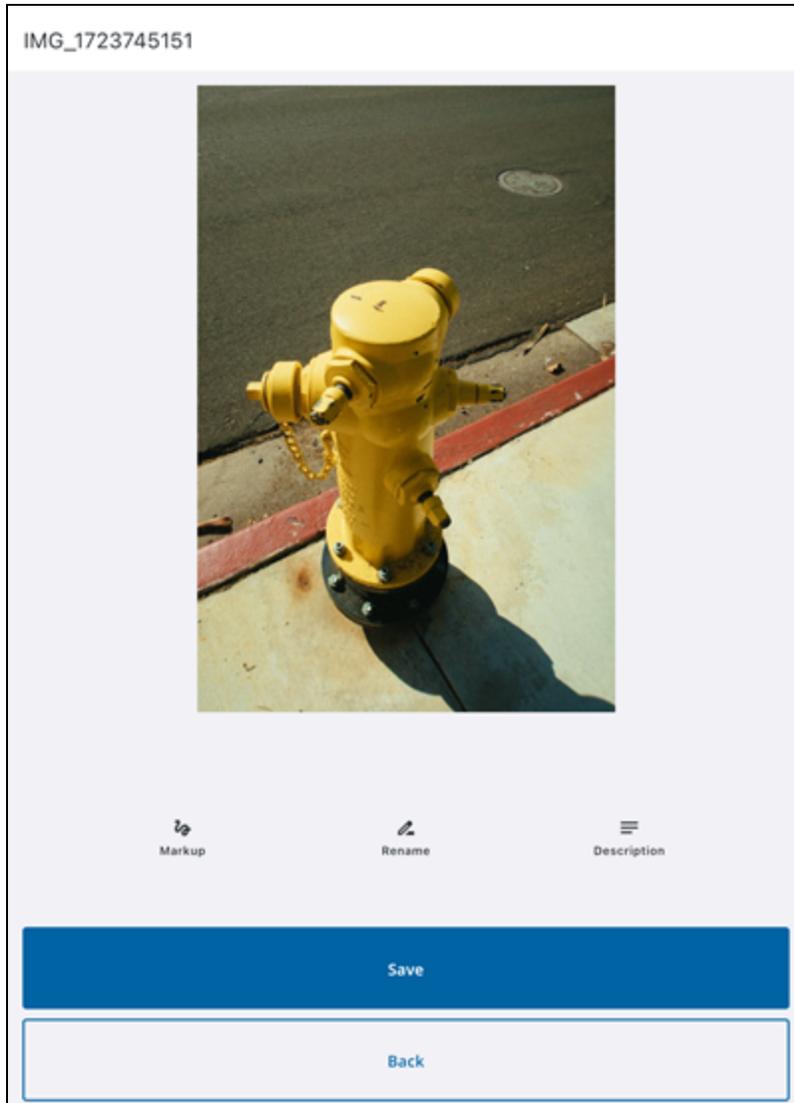
1. Open a work activity.
2. Tap **Attach**.
3. Tap **Photo**.

A message appears informing you that Trimble Unity Field requires access to continue.

4. Tap **Continue** and accept any other device permissions to allow access.
5. Take a photo.

 **NOTE:** If you are using the Windows platform, take a photo and then tap **Back** to return to Trimble Unity Field.

- **Markup:** Tap to mark up the attachment.
 - **Rename:** Tap to rename the attachment.
 - **Description:** Tap to add a description for the attachment.
 - **Back:** Tap to return to the **Attachments** screen without saving.
6. Tap **Save**.



Attach One or More Photos from the Camera Roll

You can attach one or more photos from your device's camera roll to a work activity.

Attach a Photo

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Camera Roll**.

A message appears informing you that Trimble Unity Field requires access to continue.

4. Tap **Continue** to accept any other device permissions to allow access.

5. Select one photo to add from your device's camera roll.
6. Tap **Add**.
 - **Markup**: Tap to mark up the attachment.
 - **Rename**: Tap to rename the attachment.
 - **Description**: Tap to add a description for the attachment.
 - **Back**: Tap to return to the **Attachments** screen without saving.
7. Tap **Save**.

The photo is added to the work activity.

Attach Multiple Photos

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Camera Roll**.

A message appears informing you that Trimble Unity Field requires access to continue.

4. Tap **Continue** to accept any other device permissions to allow access.
5. Select multiple photos to add from your device's camera roll.
6. Tap **Add**.

The photos are added to the work activity.

Take and Attach Videos

Take a Video

You can take a video and attach it to a work activity.

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Video**.
4. Tap **OK** to provide access to your device's camera and microphone.
5. Take a video.
 - **Rename**: Tap to rename the attachment.
 - **Description**: Tap to add a description for the attachment.
 - **Back**: Tap to return to the **Attachments** screen without saving.
6. Tap **Save**.

Attach One or Multiple Videos

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Camera Roll**.

A message appears informing you that Trimble Unity Field requires access to continue.

4. Tap **Continue** to accept any other device permissions to allow access.
5. Select one or more videos to add from your device's camera roll.
6. Tap **Add**.

The videos are added to the work activity.

7. Tap **Attachments** to view the added videos.
8. Tap the **More** icon to access more actions.
 - **View**: Tap to view the video.
 - **Rename/Notes**: Tap to rename and/or add notes to the video.
 - **Delete**: Tap to delete the video.

Attach Documents

You can attach a document from your device to a work activity.

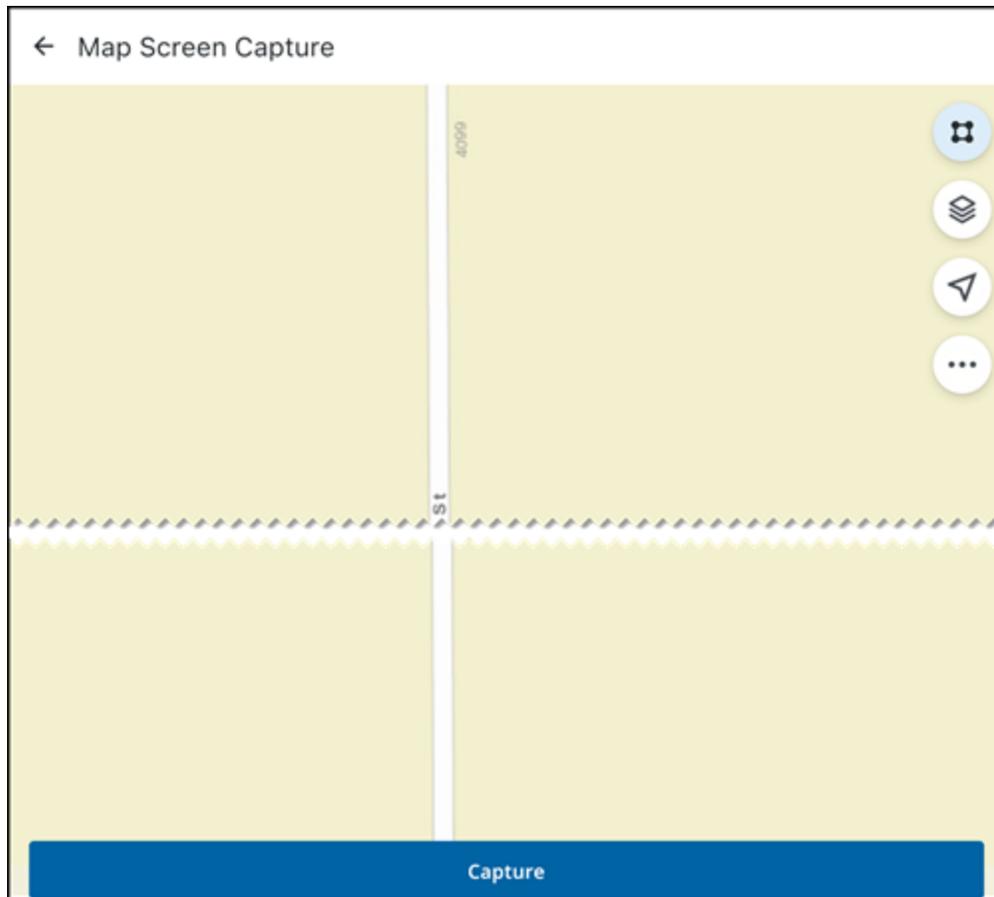
1. Open a work activity.
2. Tap **Attach**.
3. Tap **Document**.
4. Select a document from your device's library.

The document is added.

Attach Markup Map Capture

You can attach a map capture to a work activity.

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Map Capture**.
4. Navigate by zooming in or out to your desired capture zone.



5. Tap **Capture**.

- **Markup**: Tap to mark up the attachment.
- **Rename**: Tap to rename the attachment.
- **Description**: Tap to add a description for the attachment.
- **Back**: Tap to return to the **Attachments** screen without saving.

6. Tap **Save**.

View and Manage Attachments

You can view and manage existing attachments.

From a Work Activity

1. Open a work activity.
2. Tap **Attachments** to view existing attachments.
3. Tap the **More** icon on an attachment to access more actions.
 - **View**: Tap to view the attachment.
 - **Done**: Tap the attachment and tap **Done** to exit viewing.

- **Rename/Notes:** Tap to rename the attachment or add a note.
 - **X** icon: Tap to remove the current attachment name.
 - Tap the field to enter a new name or add a note.
 - **Rename:** Tap to save the new attachment name.
- **Description:** Tap to add a description.
 - Tap the field to enter a description.
 - **Update:** Tap to update the description.
- **Markup:** Tap to use markup tools to mark the image with annotations.
 - **Color picker** icon: Tap to change the markup color.
 - Draw on the attachment to mark it up.
 - **Undo:** Tap to undo the markup.
 - **Save:** Tap to save the markup.
- **Delete:** Tap to delete the attachment.

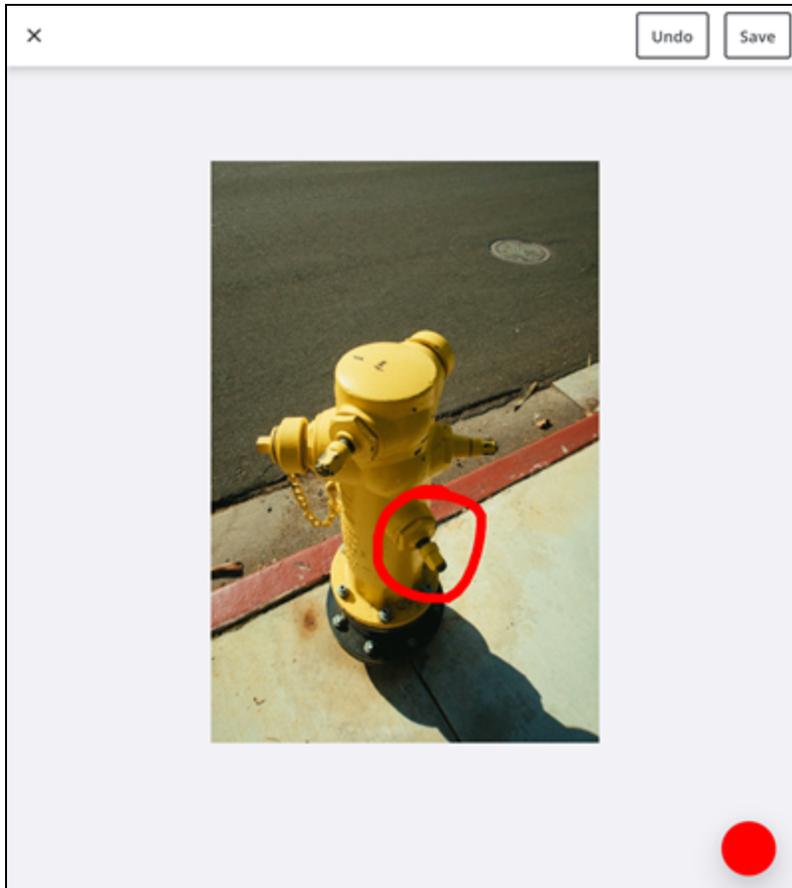
From Asset Details

1. Open the **Asset Details** page. See "Asset Details" on page 93 for more information.
2. Tap **Attachments** to view existing attachments.
3. Tap the **Download** icon to download the attachment.
4. Tap the attachment to view it.

Markup an Attachment

You can markup photos and attachments directly through the app.

1. Open a work activity.
2. Tap **Attach**.
3. Tap **Photo**
4. Take a photo.
5. Tap **Markup**.
6. Tap the color picker to change the markup color.
7. Mark up the attachment.
8. Tap **Undo** to undo a markup.
9. When all markups are done, tap **Save**.



Delete an Attachment

You can delete an attachment uploaded to a work activity.

1. Open a work activity.
2. Tap **Attachments**.
3. Select an attachment.
4. Tap the **More** icon.
5. Tap **Delete**.

The attachment is deleted.

Add Costs

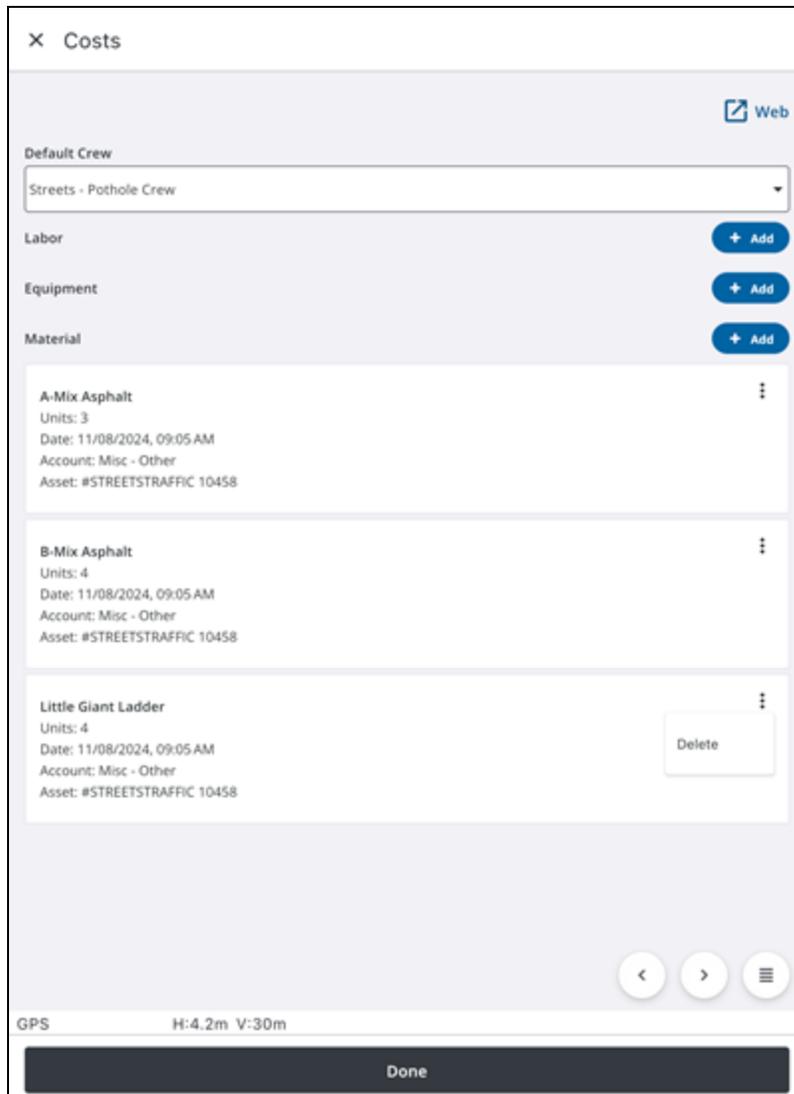
You can add equipment, labor, and material costs to a work activity.

 **BEST PRACTICE:** To accurately track mobile-applied costs, ensure that you have at least one default account under the **GLAccount Code Type**. See [Other Codes and Descriptions](#) and [Work Order Template Fields](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

1. Open a work activity.
2. Tap **Costs**.
3. Tap the **Default Crew** drop-down list to select a default crew.

 **NOTE:** The default crew selected determines which storeroom you can add materials from.

4. Tap **Add** to add your desired equipment, labor, or material costs.
5. Tap **Web** to open the equipment, labor, or material costs in the web application.
6. Tap **Done**.
7. To delete a cost, tap the **More** icon and tap **Delete**.



Add Labor

You can add labor costs to a work activity.

1. Tap **Add** to add labor costs.

The **Add Labor** panel opens.

2. Tap **Crew** to select a crew from the drop-down list.
3. Tap **Employee** to select an employee from the drop-down list.
4. Tap **Hours** to enter the hours of labor.
5. Tap **Rates** to select a rate from the drop-down list.
6. Tap **Account** to select an account from the drop-down list.
7. Tap **Start Date** to select a date from the **Select date** panel. Tap **Confirm**.

8. Tap to select a time from the **Select time** panel. Tap **Confirm**.
9. Tap **Finish Date** to select a date from the **Select date** panel. Tap **Confirm**.
10. Tap to select a time from the **Select time** panel. Tap **Confirm**.
11. Tap **Description** to enter a description.
12. Tap **Entity** to select an entity from the drop-down list.
13. Tap **Save**.

Add Equipment

You can add equipment costs to a work activity.

1. Tap **Add** to add equipment costs.

The **Add Equipment** panel opens.

2. Tap **Crew** to select a crew from the drop-down list.
3. Tap **Equipment** to select equipment from the drop-down list.
4. Tap **Hours** to enter the hours of labor.
5. Tap **Units** to enter the units.
6. Tap **Account** to select an account from the drop-down list.
7. Tap **Start Date** to select a date from the **Select date** panel. Tap **Confirm**.
8. Tap to select a time from the **Select time** panel. Tap **Confirm**.
9. Tap **Finish Date** to select a date from the **Select date** panel. Tap **Confirm**.
10. Tap to select a time from the **Select time** panel. Tap **Confirm**.
11. Tap **Entity** to select an entity from the drop-down list.
12. Tap **Save**.

Add Material

You can add material costs to a work activity.



IMPORTANT: Viewing or adding material costs for service requests is not supported.

Adding Material via Storeroom

You can add material costs via Storeroom. When viewing the material list for a storeroom, you can view the associated crew, the material name, and the available stock quantities.

The default crew selected determines which storeroom you can add materials from. See "Add Costs" on page 140 for more information on how to change your default crew.

Syncing the app updates the storeroom stock quantities on hand. See "View and Perform a Manual Sync " on page 125 for more information.

 **PREREQUISITES:**

- User must be licensed for Storeroom. See [Assign Licensing](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- Storeroom must be enabled. See [Configure Global Preferences](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

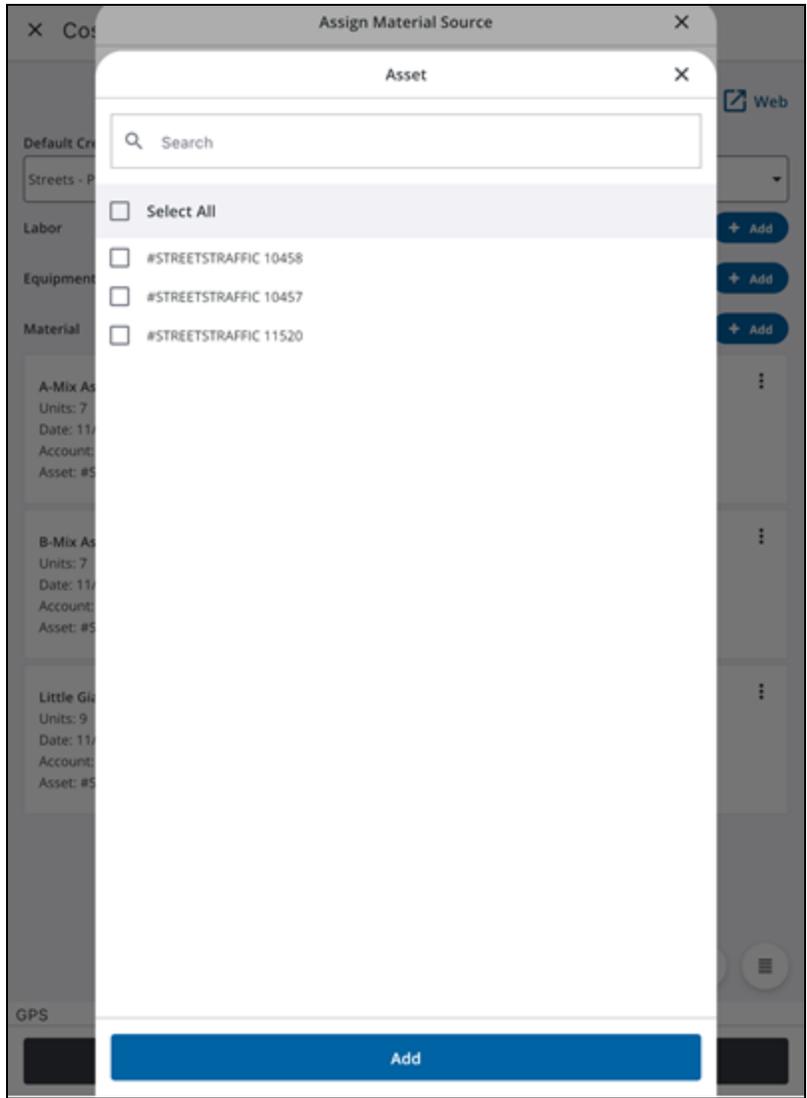
1. Tap **Add** to add material costs.

The **Assign Material Source** panel opens.

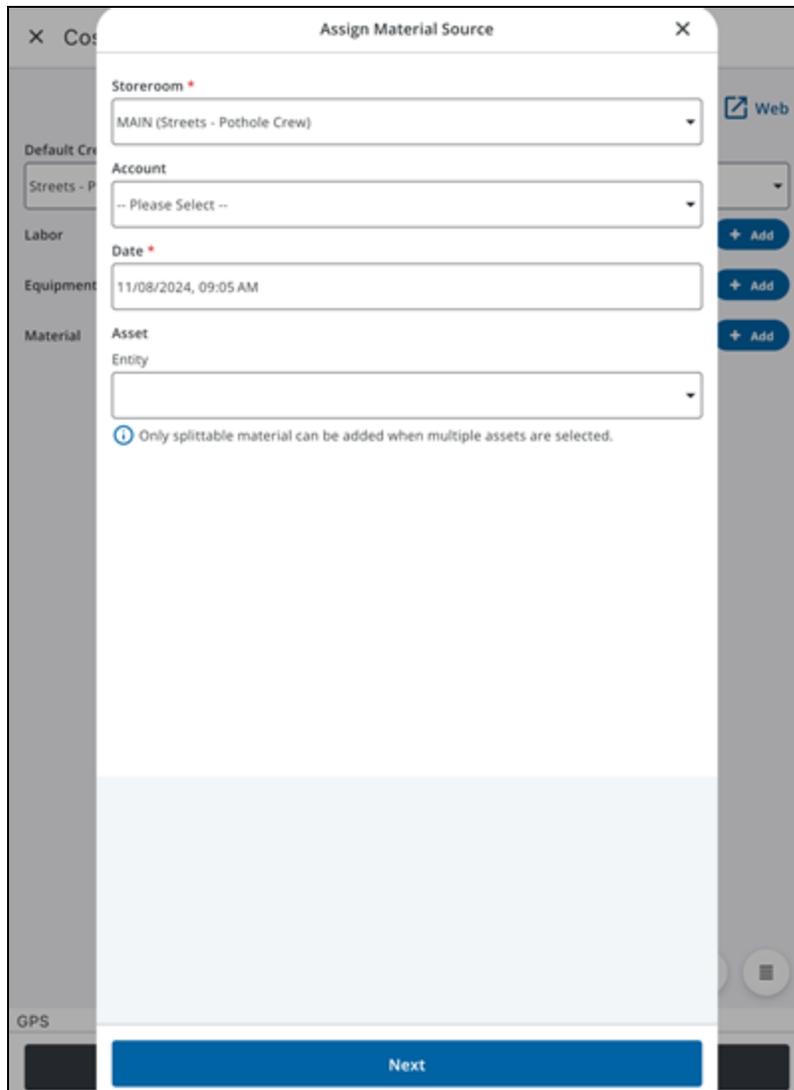
2. Tap **Storeroom** to select a storeroom from the drop-down list. The associated crew appears next to the storeroom in parentheses.
3. Tap **Account** to select an account from the drop-down list.
4. Tap **Date** to select a date from the **Select date** panel. Tap **Confirm**.
5. Tap to select a time from the **Select time** panel. Tap **Confirm**.
6. Tap **Asset** to select one or more assets from the drop-down list. Tap **Select All** to select all assets at once.

 **NOTE:** When multiple assets are selected, only splittable material can be added.

7. Tap **Add**.



8. Tap **Next**.



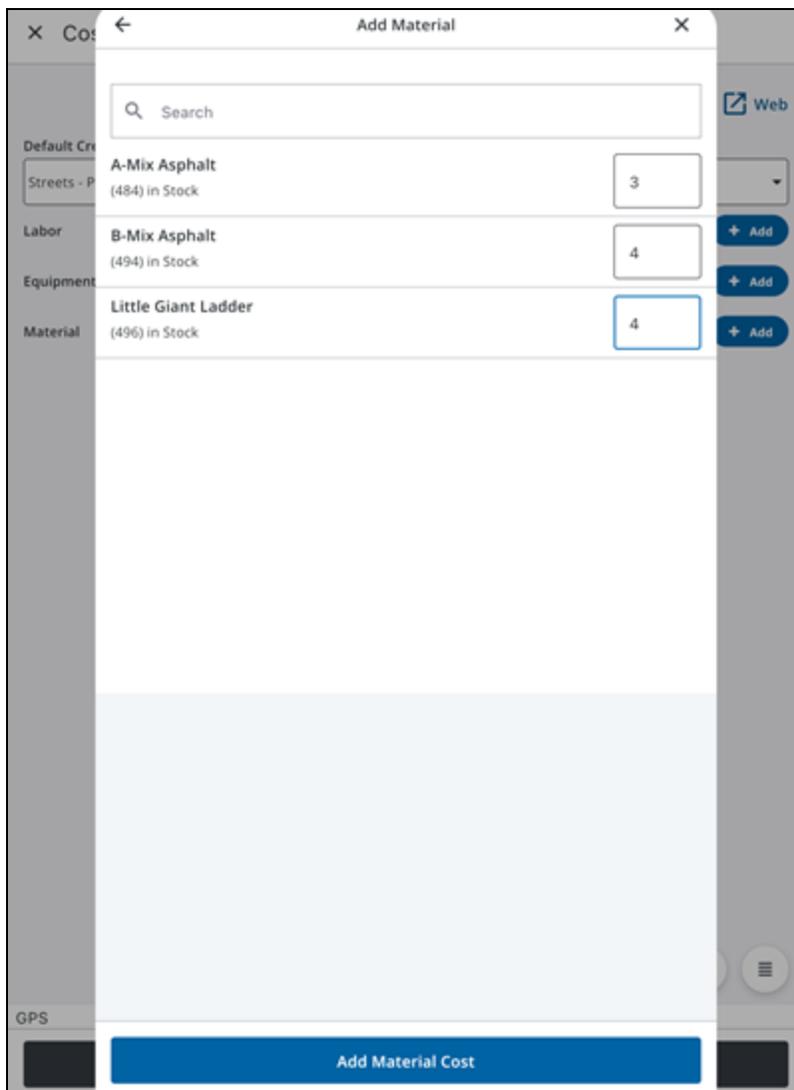
The **Add Material** panel opens. You can filter materials by typing into the search bar. The current stock quantity appears below the material name.

9. Tap the field next to your desired material to enter the material quantity. To enable disabled material, assign cost to one asset at a time.

TIP: If **Enable Negative Stock** is turned off in Storeroom and you enter a quantity that exceeds the storeroom stock, an error message displays that the storeroom quantity has been exceeded. If **Enable Negative Stock** is turned on in Storeroom, negative stock quantities are allowed. To avoid negative stock quantities, only add material amounts equal or less than the stock available. See [Configure Global Preferences](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

10. When finished, tap **Add Material Cost**.

11. Tap the field beside a material to add the material cost.



The material costs are added.

Adding Material via the Material List

If you are not licensed for Storeroom and Storeroom is not enabled, you can add material via the material list.

1. Tap **Add** to add material costs.

The **Add Material** panel opens.

2. Tap **Crew** to select a crew from the drop-down list.
3. Tap **Account** to select an account from the drop-down list.
4. Tap **Material** to select a material from the drop-down list.
5. Tap **Date** to select a date from the **Select date** panel. Tap **Confirm**.
6. Tap to select a time from the **Select time** panel. Tap **Confirm**.
7. Tap **Units** to enter the units.
8. Tap **Entity** to select an entity.
9. Tap **Save**.

The material costs are added.

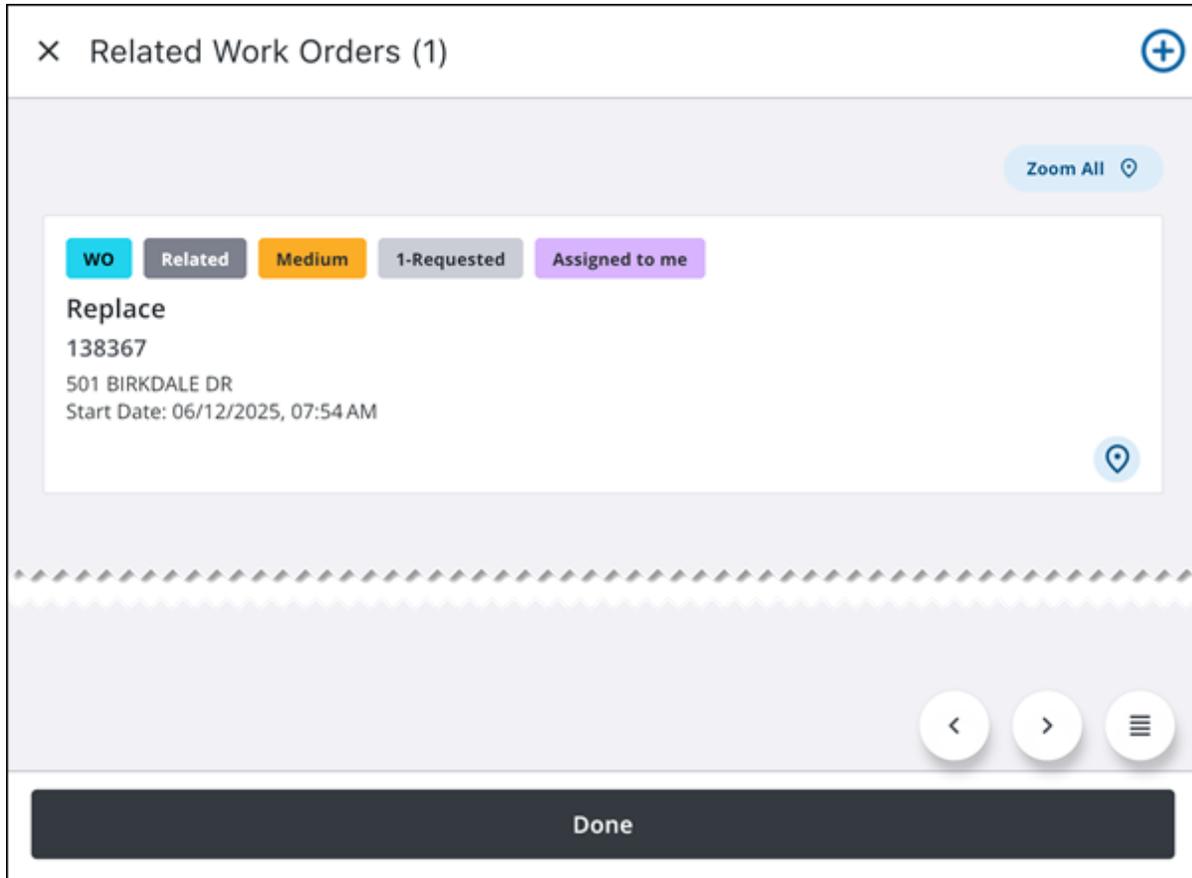
Create and View a Related Work Activity

You can create and view a related work activity. This action is only available for work orders, service requests, and inspections.

From the Related Work Activity Page

You can create a related work activity from the related work activity page.

1. Open a work activity.
2. Tap **Related Inspections, Related Work Orders, or Related Service Requests** depending on the desired related work activity you would like to create.



3. Tap **Add**.

A message appears asking if you want to create the related work activity on the same associated asset.

4. Tap **Yes**.

5. Select a **Template**.

6. Select an **Asset Group**, **Asset Type**, and **Template**.

7. Enter information into the desired fields for the work activity.

8. Tap **Save**.

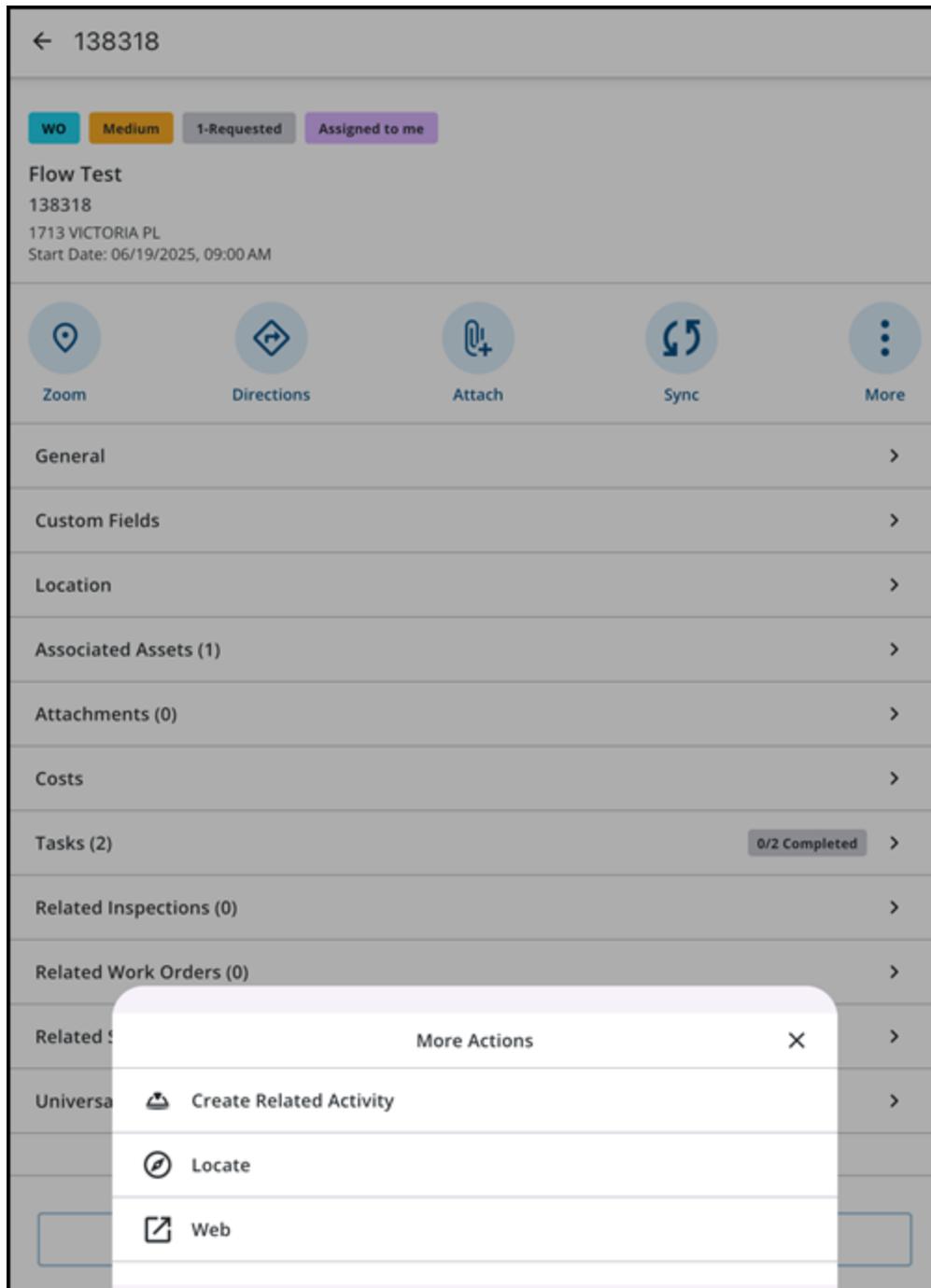
The related work activity is created and appears under its respective related work activity field.

From the More Actions Menu

You can create a related work activity from the **More Actions** menu.

1. Open a work activity.

2. Tap **More**.



3. Tap **Create Related Activity**.
4. Select the desired related work activity to create.

A message appears asking if you want to create the related work activity on the same associated asset.

5. Tap **Yes**.
6. Select a **Template**.

7. Enter information into the desired fields for the work activity.
8. Tap **Save**.

The related work activity is created and appears under its respective related work activity field.

View Related Work Activities on the Map

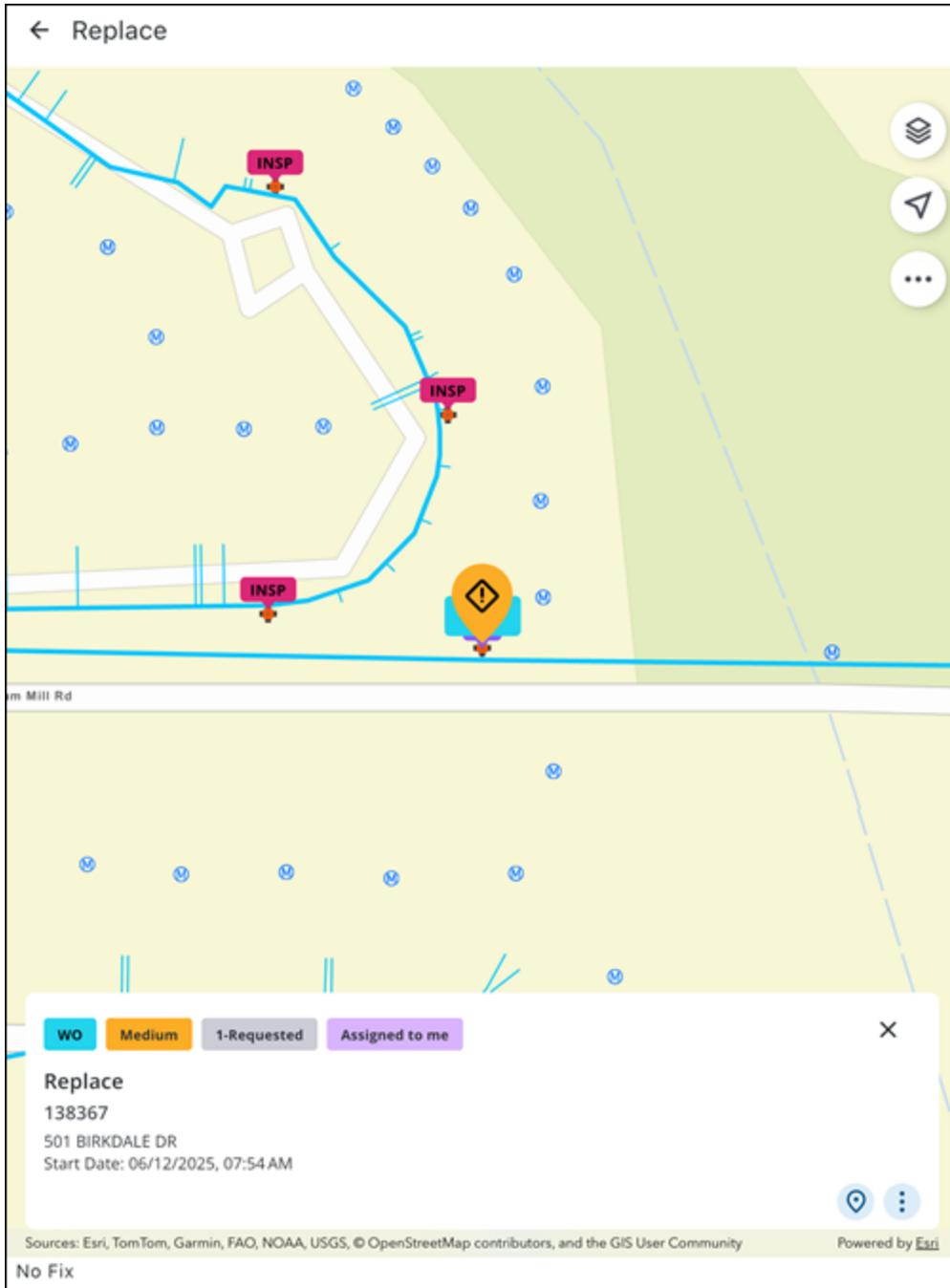
You can view related work activities on the map.

Associated assets and related work activities appear as icons on the map that dynamically update as actions are taken, providing a clear visual representation of progress and remaining tasks. This streamlines workflows by allowing users to quickly identify and take action on related activities and associated assets directly from the map.

1. Open a work activity.
2. Tap **Related Inspections**, **Related Work Orders**, or **Related Service Requests** depending on the desired related work activity you would like to view.
3. Tap **Zoom All** to zoom to all related work activities on the map.
4. Tap the **Map** icon to view the related work activity on the map.

The map zooms to the highlighted work activity pin and the activity card is shown.

- **Work Activity Card**: Tap to return to the work activity details screen.
- **Map** icon: Tap to zoom to the related work activity.
- **More** icon: Tap to view more actions.
 - **Directions**: Tap to get directions to the related work activity. See "Go To Work Location" on page 131 for more information.
 - **Attach**: Tap to add an attachment to the related work activity.
 - **Create Related Activity**: Tap to create another related work activity.



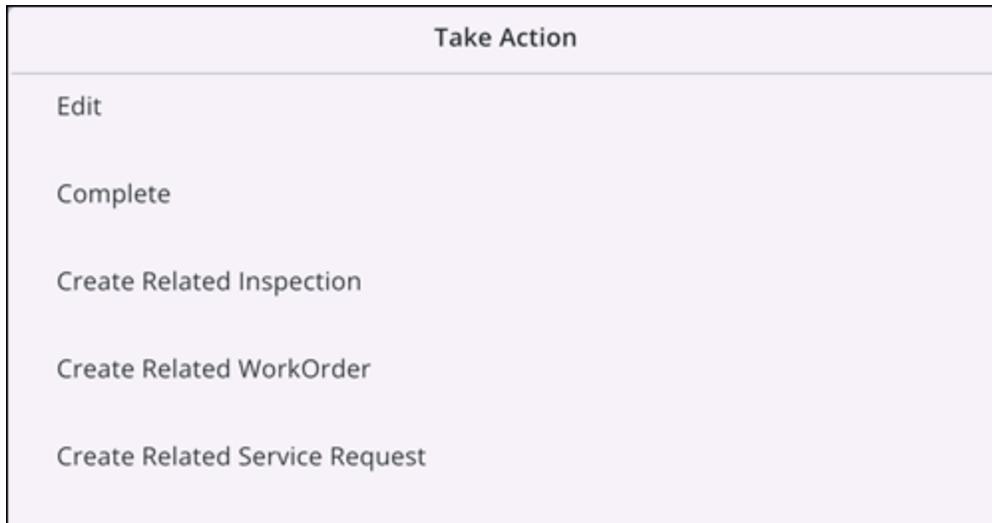
Complete the Work Activity

After collecting the necessary data and information for a work activity, you can take action to progress the workflow.

Take Action to Progress the Workflow

You can take action on work activities to progress the workflow.

1. Tap a work activity.
2. Tap **Associated Assets**.
3. Tap **Take Action**. You can also access this feature by tapping on an associated asset.



4. Tap the desired action to take it.
 - **Edit:** Tap to edit the associated asset.
 - **Complete:** Tap to complete the work activity.
 - **Create Related Inspection:** Tap to create a related inspection. This action is only available for work orders, service requests, and inspections.
 - **Create Related WorkOrder:** Tap to create a related work order. This action is only available for work orders, service requests, and inspections.
 - **Create Related Service Request:** Tap to create a related service request. This action is only available for work orders, service requests, and inspections.

GIS Feature Data Collection

You can efficiently perform GIS feature and asset data collection directly in the field, all within the same app you use for daily fieldwork. This streamlines workflows, allowing you to add missing assets or update a feature's position in real time. When a feature is collected, you can record attribute data, enhancing operational efficiency and supporting critical decision making.

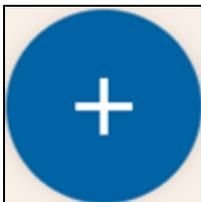
✓ PREREQUISITES:

- **ArcGIS License:**
 - Editing GIS Asset data requires an ArcGIS Advanced Editing license. If you do not have this license, you will not be able to make any changes to asset details and an error will appear informing you that your ArcGIS license does not support editing of this feature and an Advanced Editing license is required. Please contact your administrator or see [Introducing the ArcGIS Advanced Editing user type extension](#) on Esri's website for more information.
- **Web Map Configuration:**
 - You must have a web map that has been enabled for editing and that is set up for data collection. See [Create a map](#) and [Design an editable layer](#) on Esri's website for more information.
- **GNSS Metadata Setup:**
 - To store GNSS metadata for any feature, specifically for line and polygon features, your feature layers must have specific fields defined and attachments enabled. See [Prepare your data to record GPS metadata](#) on Esri's website for more information.

Collect a New GIS Feature or Asset

You can create a GIS feature or asset while in the field.

1. Open the **Map**.
2. Tap the **Add** icon.



3. The **Add** panel opens.
4. Tap **Assets**.
5. Select an **Asset**. If prompted, select an **Asset Type**.

The **Create Asset** panel opens to the **General** page. You can also access the **Location** page.

The following actions are available from the **General** page:

- **Menu** icon: Tap to view the list of pages. Tap a page to navigate to it.
 - **General**: Tap to view and enter details on the **General** page.
 - **Location**: Tap to view and enter details on the **Location** page.
- **Next** arrow: Tap to navigate to the next page.
- **Back** arrow: Tap to navigate to the previous page.
- **Swipe left and right**: Swipe left or right on the screen with a finger to navigate between pages.
- **Create**: Tap to create the asset.
- **Cancel**: Tap to cancel the asset creation.

The following actions are available from the **Location** page:

- **Capture**: Tap to capture the asset location. See "Quick Capture GIS Features and Assets Using GNSS" on page 156 for more information.
 - **Map**: Tap to add a location from the map. See "Manually Digitize GIS Features and Assets from the Map" on page 158 for more information.
 - **Clear**: Tap to clear the selected location and all GNSS metadata.
 - **Details**: Tap to view location details.
6. Enter information into the desired fields for the asset from the **General** and **Location** pages. See "Forms" on page 120 for more information.
 7. Tap **Create**.

The GIS feature or asset is created.

Quick Capture GIS Features and Assets Using GNSS

You can quick capture GIS feature and asset data using your GNSS position.

 **NOTE:** If an external GNSS receiver is not connected, the location is captured based on your device's internal GPS. See "Connect to the GNSS Receiver" on page 26 for more information on connecting a GNSS receiver and ensuring the most accurate capture.

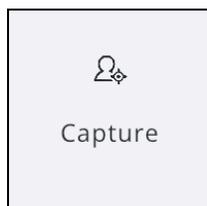
Capture a Point Location

You can capture a point location for a GIS feature or asset.

1. Tap the **Add** icon.

The **Add** panel opens.

2. Select **Asset** and add an asset. See "Collect a New GIS Feature or Asset" on page 154 for more information.
3. From the **General** page for the new asset, tap the **Menu** icon.
4. Tap **Location**.
5. Tap **Capture**.



The GNSS location is captured. Once the location is captured, relevant GNSS metadata fields (e.g., accuracy, fix type, date/time) are automatically saved and populated.

Capture a Point with Accuracy

You can capture a point with accuracy using the **My Location** icon.

1. On the **Location** page for your asset or work activity, tap **Map**.

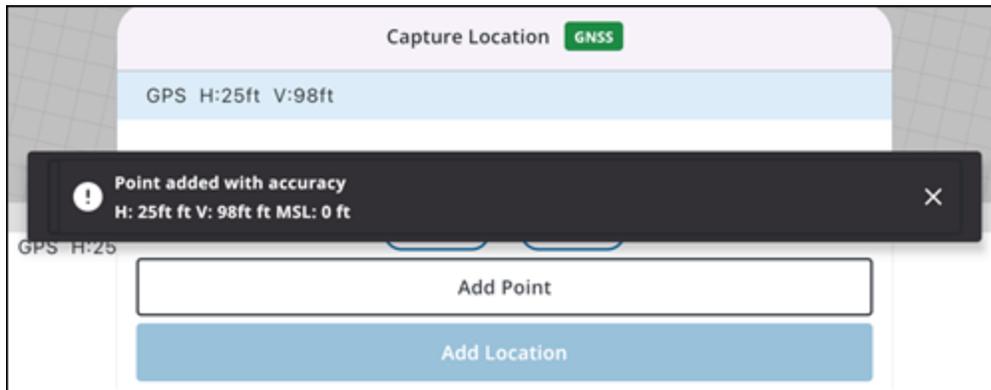
The **Capture Location** panel opens to your current location on the map.

2. Tap the **My Location** icon to lock the map to your orientation. See **Follow My Orientation** in the "View My Location on the Map" on page 174 topic for more information.

The map rotates relative to your change in direction and the **Compass** icon appears under the **My Location** icon, displaying the current direction and where North is relative to your orientation.

3. Tap **Add Point**.

A message appears stating the point was added with accuracy, along with metadata details.



4. Tap **Add Location**.

The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.

Manually Digitize GIS Features and Assets from the Map

You can collect and update GIS feature and asset data in the field by capturing locations via manual digitization (through points, lines, or polygons) and by entering attribute details.

Capture Location

You can capture the location for a GIS feature or asset.

1. Collect a new GIS feature or asset. See "Collect a New GIS Feature or Asset" on page 154 for more information.
2. From the **General** page for the new asset, tap the **Menu** icon.
3. Tap **Location**.
4. Tap **Map**.

The **Capture Location** panel opens to your current location on the map.

5. Add a point.
6. Tap **Add Location**.

The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.

Capture Location Panel

The **Capture Location** panel allows you to add points, lines, or polygons depending on your feature type. It also provides tools to guide your capture process.

1. With the **Capture Location** panel open, tap and drag on the map.

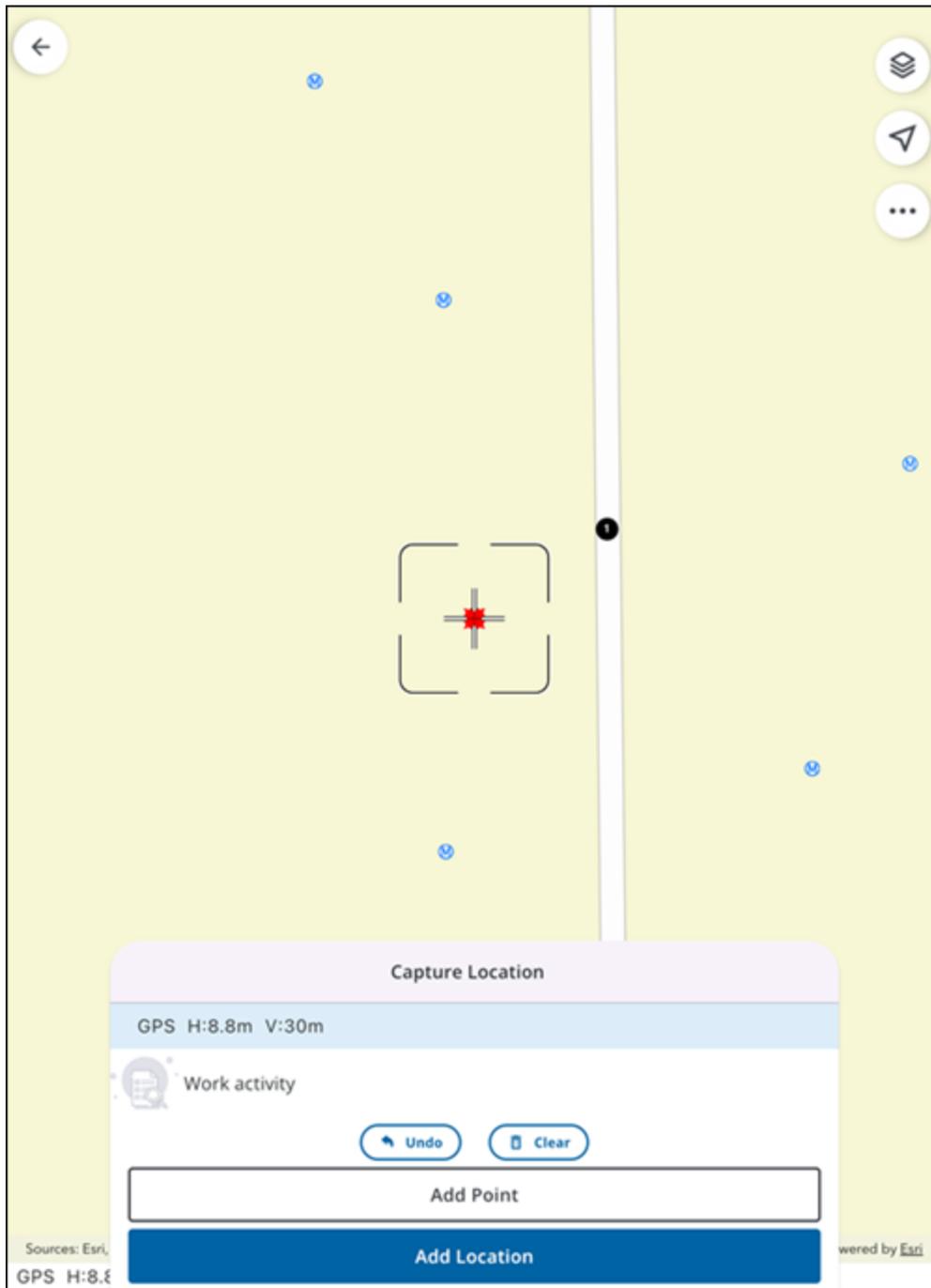
A reticle appears on the map, providing a guide for where a point will be placed.

 **NOTE:** For features consisting of a single vertex (e.g. a tree or a valve), you must tap directly on the map screen to add a point. The **Add Point** tool is only available when adding multiple points for linear or polygonal features. See "Capture Location Methods" on the next page for more information.

The following options are available on the **Capture Location** panel:

- **Add Point:** Tap to add a point when collecting linear or polygonal features. This option is not available for single-point features.
- **Add Location:** Tap to add a location and return to the **Location** page.
- **Undo:** Tap to undo your last action.

- **Clear:** Tap to clear all points.



Capture Location Methods

Depending on your GIS Feature type, you can choose how to capture its location using the reticle guide and the **Capture Location** panel.

Capture a Point

You can capture a single point on the map, allowing you to indicate a single vertex consisting of a coordinate pair (e.g. a valve or a tree).

1. Using the reticle guide, tap and drag to your desired location.
2. Tap on the map to add a point.

A point is added on the map. To remove the point, tap the map again.

3. Tap **Add Location**.

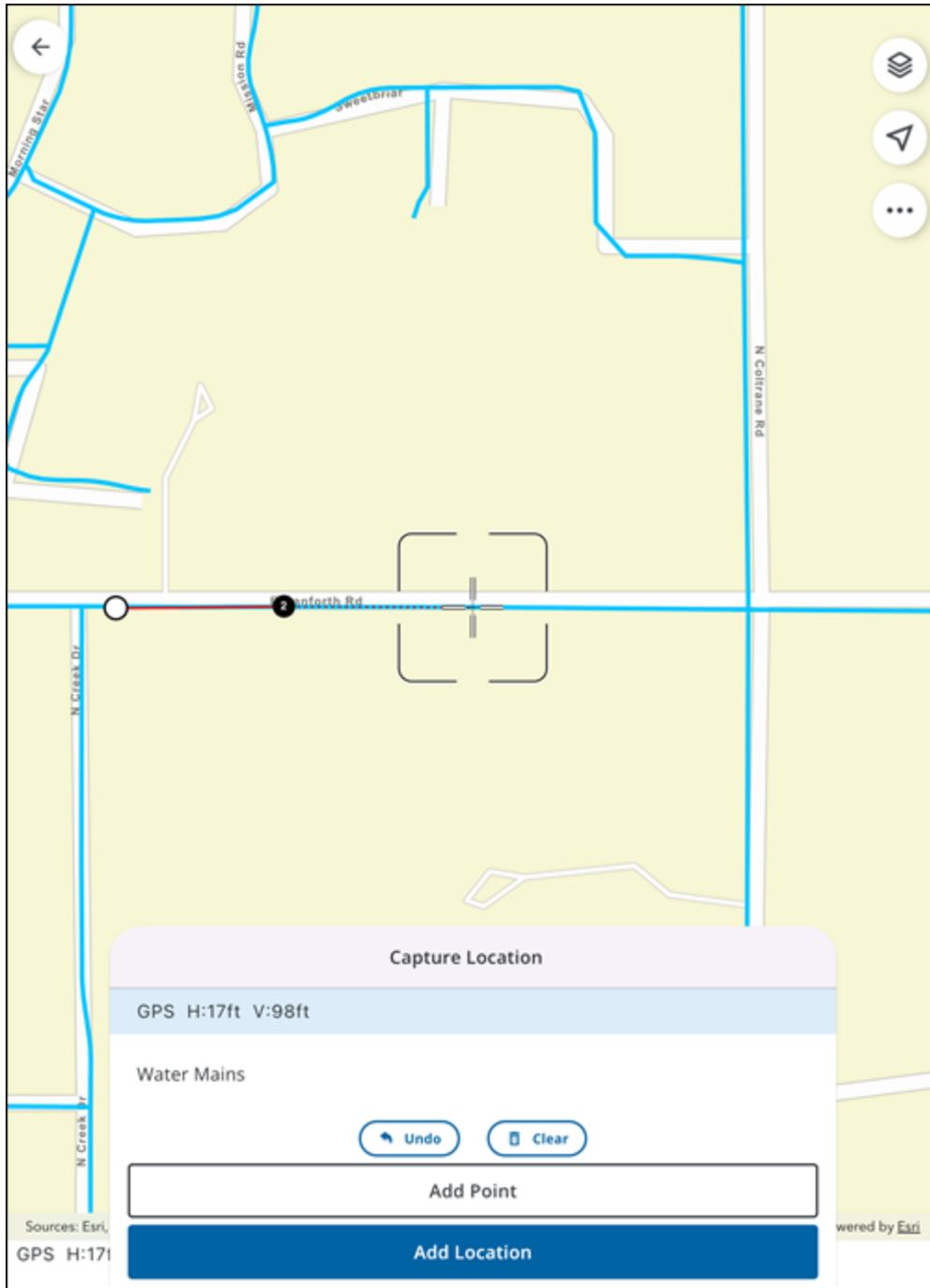
The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.

Capture a Line

You can capture a line on the map for a linear feature, allowing you to indicate two or more vertices that are connected (e.g. a water main or power line).

1. On the **Capture Location** panel, tap **Add Point** to add your first point.
2. Tap and drag the map to where you want to add your next point. A dotted red line displays a preview of the line segment.
3. Tap **Add Point** again to add the next point and extend the line.
4. Repeat Steps 2-3 for additional points if needed.
5. Once all points for the line are added, tap **Add Location**.

The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.



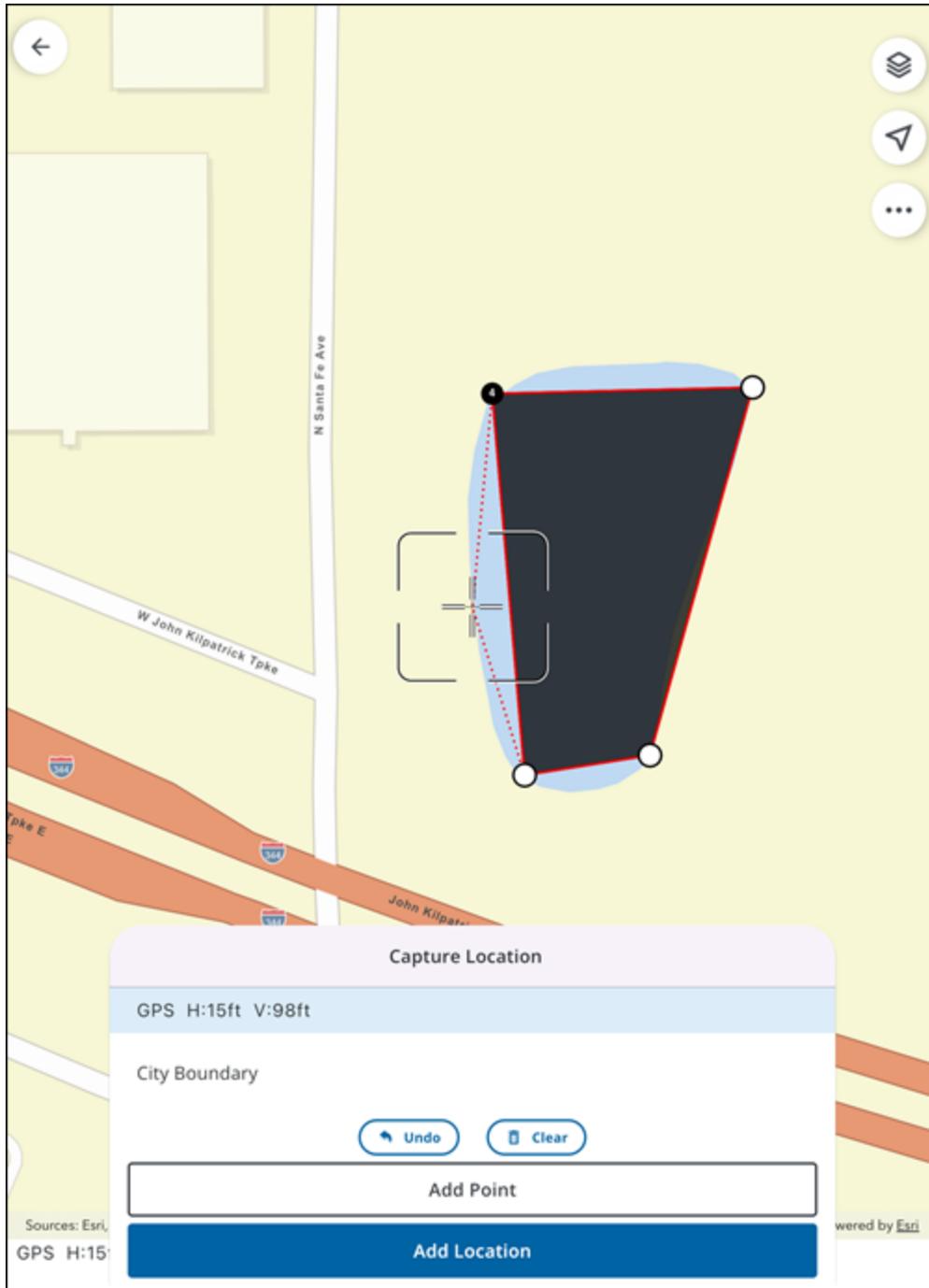
Capture a Polygon

You can capture a polygon on the map, allowing you to collect multiple vertices that define a sequence of connected points that form a closed boundary (e.g. a lake or city limits).

1. On the **Capture Location** panel, tap **Add Point** to add your first point.

2. Tap and drag the map to where you want to add your next point. A dotted red line displays a preview of the line segment, and a shaded area displays a preview of what is contained within the polygon.
3. Tap **Add Point** again to add the next point and create the polygon shape.
4. Repeat Steps 2-3 for additional points if needed.
5. Once all points for the polygon are added, tap **Add Location**.

The **Location** is added and you are brought back to the **Location** page, where related metadata fields are automatically saved and populated.



Edit GIS Feature and Asset Data

You can edit asset details and update GIS feature attributes, making real-time adjustments to enhance data reliability and confirm accurate field data conditions. This feature works with maps available online or offline.

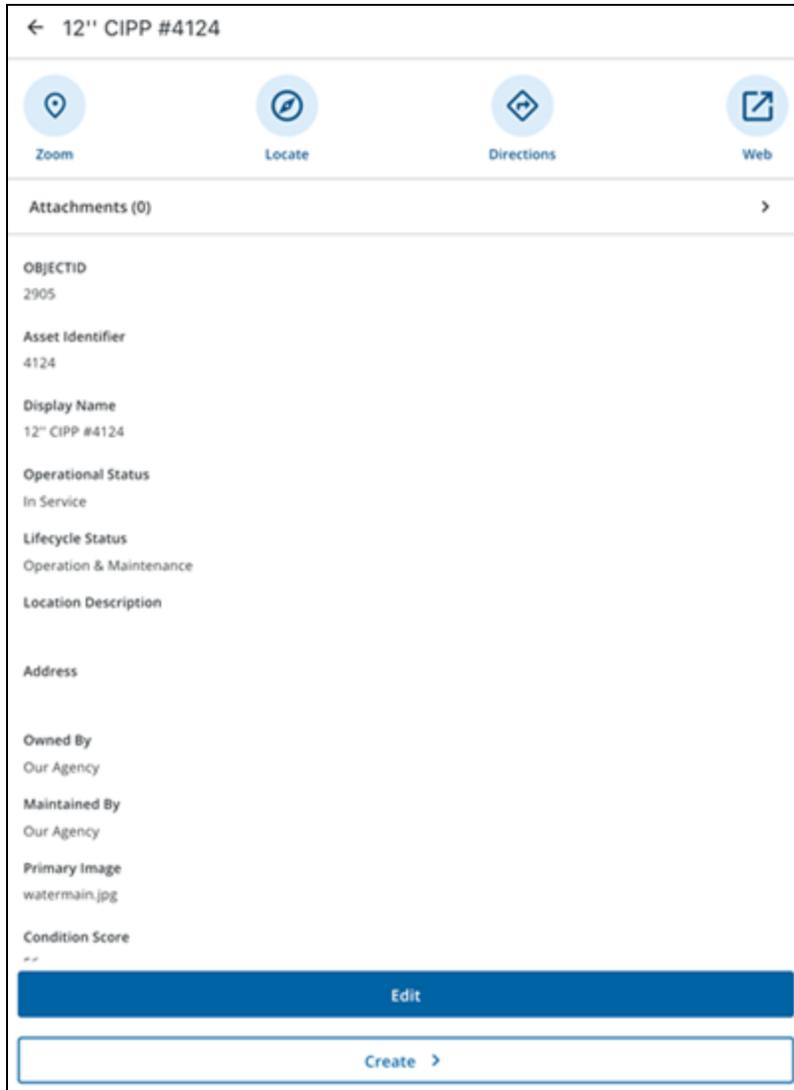


✓ **PREREQUISITES:**

- Editing GIS Asset data requires an ArcGIS Advanced Editing license. If you do not have this license, you will not be able to make any changes to asset details and an error will appear informing you that your ArcGIS license does not support editing of this feature and an Advanced Editing license is required. Please contact your administrator or see [Introducing the ArcGIS Advanced Editing user type extension](#) on Esri's website for more information.

Edit an Asset from the Map

1. From the map, select and open an asset to view the **Asset Details** screen. See "Select Assets on the Map" on page 86 and "Search For Assets" on page 90 for more information.
2. Tap **Edit**.



3. Tap a field and edit as desired.
4. Tap **Save**.

← 12" CIPP #4124

OBJECTID
2905

Asset Identifier
4124

Display Name
12" CIPP #4124

Operational Status *
In Service

Lifecycle Status *
Operation & Maintenance

Location Description

Address

Owned By
 Our Agency
 Private
 Other

Save

A message appears confirming the changes were successfully saved. Any changes are synced with the GIS database during the next automatic or manual syncing cycle.

Edit an Associated Asset

1. Tap a work activity.
2. Tap **Associated Assets**.

Any assets associated with the work activity appear in the list.

3. Tap an associated asset.
4. Tap **Take Action**.
5. Tap **Edit**.
6. Tap a field and edit as desired.
7. Tap **Save**.

A message appears confirming the changes were successfully saved. Any changes are synced with the GIS database during the next automatic or manual syncing cycle.

Edit GIS Feature and Location Data

While in **Edit** mode, you can update GIS feature and asset data.

1. While editing an asset from the map or an associated asset, tap the **Menu** icon.
2. Tap **Location**. The following options are available from the **Location** page:
 - **Capture**: Tap to capture the work activity location. See "Quick Capture GIS Features and Assets Using GNSS" on page 156 for more information.
 - **Map**: Tap to select a location on the map. See "Manually Digitize GIS Features and Assets from the Map" on page 158 for more information.
 - **Clear**: Tap to clear the selected location.
 - **Details**: Tap to view location details.

Map

The map allows users to view and interact with GIS data in real-time in reference to their current location in the field. When opened, the map zooms to display all work activities.

Work activities appear as icons on the map, along with sync-enabled feature layers. Additionally, map icons dynamically update as actions are taken on associated assets and related activities, providing a clear visual representation of progress and remaining tasks. This streamlines workflows by allowing users to quickly identify and take action on related activities and assets directly from the map.

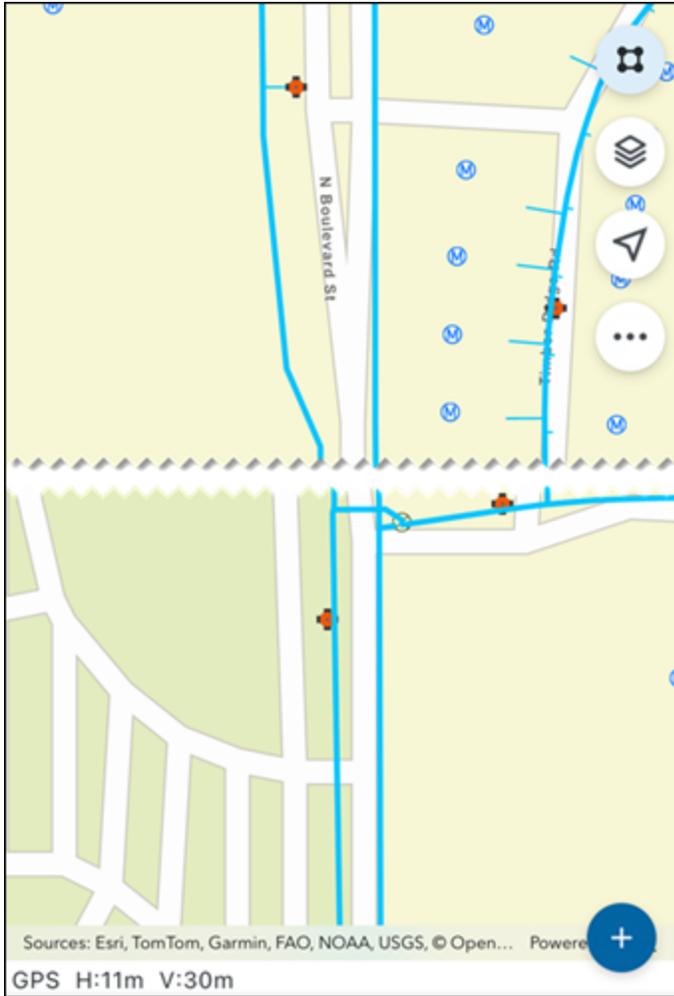
The map appearance is based on basemaps configured to appear in the app.

 **IMPORTANT:** Mobile map packages (MMPK) are not supported.

The following icons appear on the map:

- **Select** icon ( - **Web Maps**: Tap to view and switch between any web maps assigned to your user role. You can also access the default web map. See "[Switch Web Maps](#)" on [page 178](#) for more information.
 - **Offline Map Areas**: Tap to view, download, switch, refresh, and clear offline map areas.
 - **Base Maps**: Tap to view and switch between base maps using the **Base Maps Selection Tool**.
 - **Legend**: Tap to view the map legend.
 - **Cancel**: Tap to exit the menu.
- **Add** icon (

Map



Select GIS Features from the Map

You can view and select assets from the map.

If your selection contains both work activities and assets, the **Choose a Type** panel appears.

- **Assets:** Tap to view selected assets.
- **Activities:** Tap to view selected work activities.

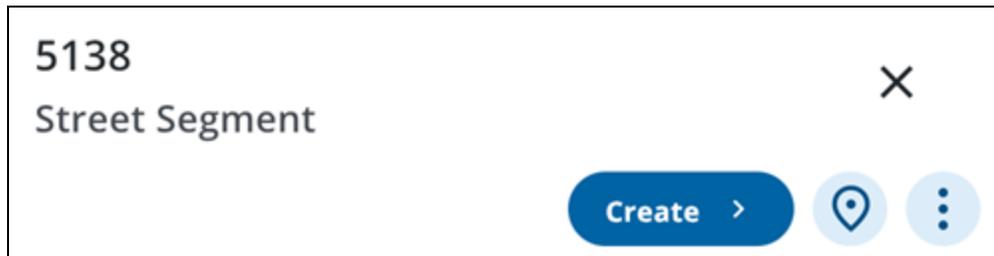
Choose a Type		×
Assets (84)		>
Activities (1)		>

 **NOTE:** You can choose which layers and GIS features on the map are selectable. See "Toggle the Visibility and Selection of Layers" on page 173 for more information.

Single Asset Selection

If a single asset is selected, the asset card appears on the map.

1. Open the **Map**.
2. Tap the **Select** icon or tap the map to select a single asset.
 - **View Asset Details:** Tap the card to view the asset details. See "Asset Details" on page 93 for more information.
 - **Create:** Tap to create a work activity from the selected asset.
 - **Map** icon: Tap to view the selected asset on the map.
 - **More** icon: Tap to access more actions.
 - **Locate:** Tap to open advanced locate for the selected asset.
 - **Directions:** Tap to open driving directions to the selected asset.
 - **Web:** Tap to open the selected asset in the web application.



Multiple Asset Selection

If multiple assets are selected, the **Assets** panel appears displaying each asset.

1. Tap on the map.

Any selectable assets in that area are selected and appear on the **Assets** panel.



2. Tap the check box to select one or more assets.

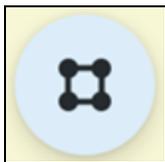
The number of selected assets updates and the **Create** option is available.

- Tap an asset to view the **Asset Details** screen.
- **Hierarchy** icon: Tap to open the asset hierarchy, if one is available.
- **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
 - **Web**: Tap to open the selected asset in the web application.
 - **View Asset Details**: Tap to view the asset details. See "Asset Details" on page 93 for more information.
- **Create**: Tap to create a new inspection, work order, or service request for the asset.

Use the Select Icon to Draw a Rectangle

The **Select** icon allows you to select assets on the map. Users can define their selection area with a rectangle drawn on the map.

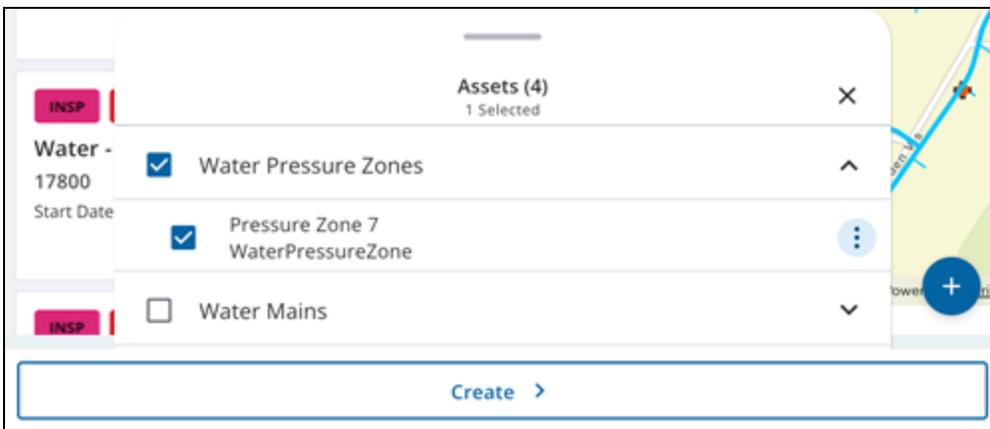
1. Tap the **Select** icon.



2. Tap and drag across the map to draw a rectangle.



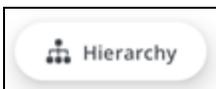
Any selectable assets in that area are selected and appear on the **Assets** panel.



Asset Hierarchy

You can view the asset hierarchy for a selected asset that has child assets or a hierarchy associated with it.

1. Select a single asset on the map via a tap or by drawing a rectangle.
2. Tap **Hierarchy**.



The **Hierarchy** panel opens.

3. Tap the check box to select one or more assets.

- **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
- **Create**: Tap to create a new inspection, work order, or service request for the asset.

Clear a Selection

Users can clear an existing selection.

1. Tap **X** or swipe down on the **Assets** panel to clear the selected assets.

Toggle the Visibility and Selection of Layers

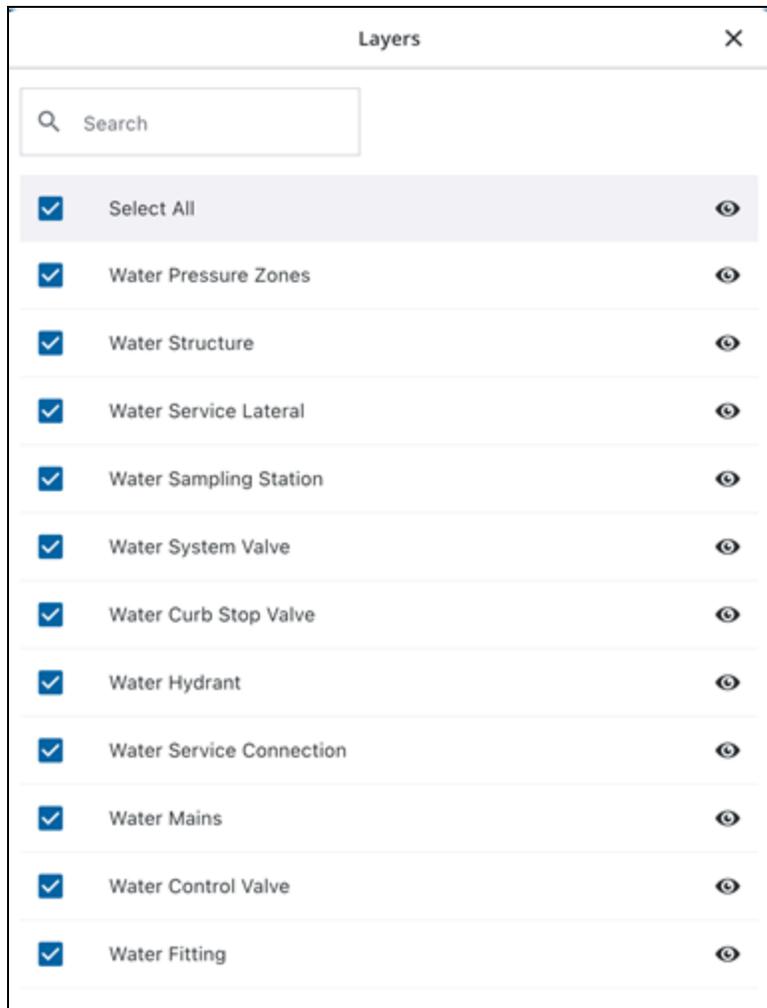
You can toggle the visibility and selection of GIS layers on the map.

Inspections, service requests, and work orders, assets, and GIS features appear as layers on the map. These layers can be made visible in the **Layers** list.

1. Tap the **Layers** icon.



2. Tap **Layers**.



- Search bar: Tap to enter and search for a specific layer.
- **Visibility** icon: Tap to toggle the layer's visibility.
 - To make all layers visible at once, tap the **Visible** icon next to **Select All**. To make all layers invisible at once, tap it again.
- **Check mark** icon: Tap the icon next to a layer to select it.
 - To select all layers at once, tap the **Check mark** icon next to **Select All**. To deselect all layers at once, tap it again.

The map automatically updates based on the selected layers.

View My Location on the Map

You can view your location on the map in relation to assets and work activities. The **My Location** icon allows you to quickly center the map to your current location and view real-time updates as you move, providing increased spatial awareness with the map orientation.

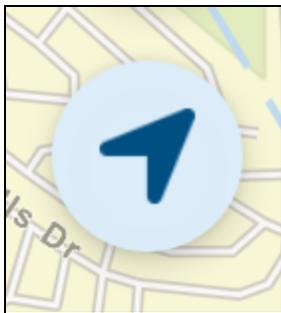
✓ **PREREQUISITES:**

- **Precise Location Services** must be turned on in your device settings for this functionality to work. If you have **Approximate Location Services** turned on, this tool displays an approximate location.

Center the Map to My Location

You can center the map to your location. As you move, the map auto-pans to keep your location centered.

1. Tap the **My Location** icon.



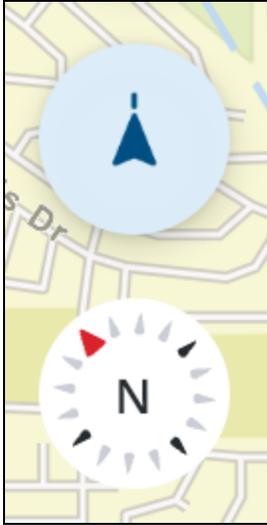
The map zooms and centers to your location, staying centered with a North-up orientation as you move around. The map stays centered on your location until you manually pan away or view an asset or activity's location on the map.

Follow My Orientation

The map can be locked to follow your orientation.

1. Tap the **My Location** icon to center the map to your current location.
2. Tap the **My Location** icon again to lock the map to your orientation.

The map rotates relative to your change in direction and the **Compass** icon appears under the **My Location** icon, displaying the current direction and where North is relative to your orientation.

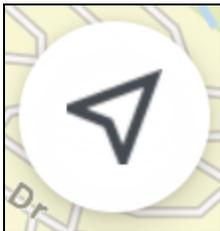


Additionally, the **User Location** icon updates to display your current orientation.



Reset Map to Default North Orientation

You can reset the map view to the standard North-up orientation at any time.



Center the Map to My Location

1. If the map is centered to your location, tap the **My Location** icon twice to reorient the map to the North-up orientation.

The map view is reset into a North-up orientation.

Follow My Orientation

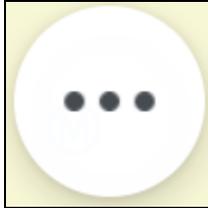
1. If the map is locked to follow your orientation, tap the **My Location** icon once to reorient the map to the North-up orientation.

The map view is reset into a North-up orientation.

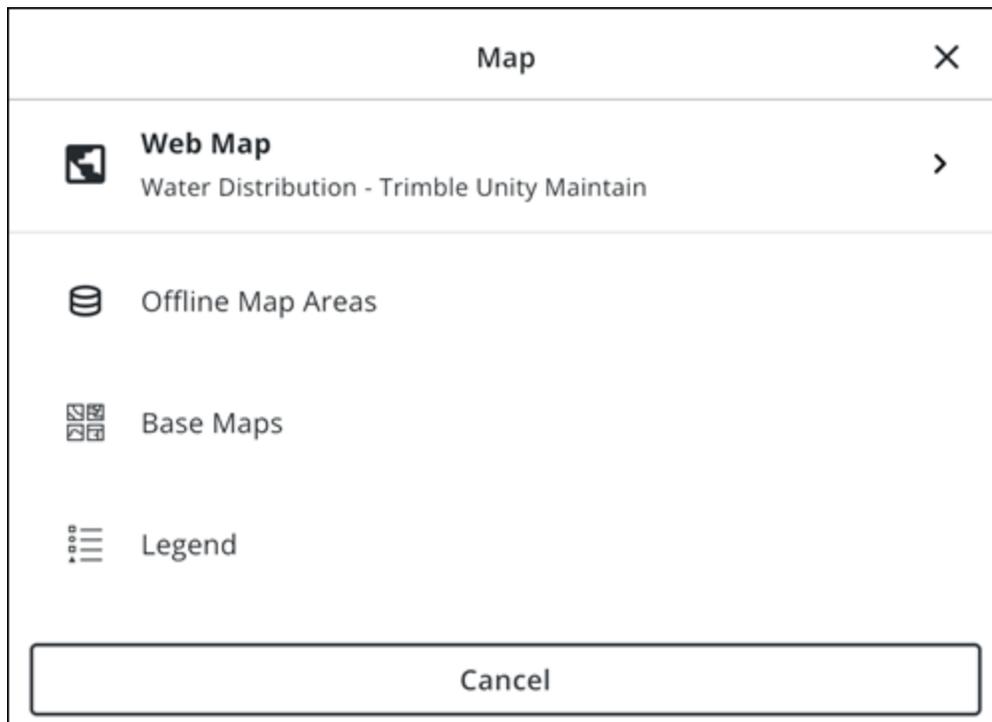
More Actions Menu

You can access web maps, offline map areas, base maps, and legend options using the **More Actions** icon.

1. On the map, tap the **More Actions** icon.



The **More Actions** menu appears.



- **Web Map:** Tap to view and switch between the default web map and any other web maps assigned to your user role.
- **Offline Map Areas:** Tap to view and download offline map areas.
- **Base Maps:** Tap to view and edit base maps using the **Base Maps Selection Tool**.
- **Legend:** Tap to view the map legend.
- **Cancel:** Tap to exit the menu.

Switch Web Maps

Trimble Unity Field allows you to access and switch between web maps with focused GIS data that supports specific field workflows. This allows you to use the web map that most efficiently presents the data you need to get your job done. Additionally, offline areas for each unique web map guarantee data access even without internet coverage. See "Offline Map Areas" on the next page for more information.

To set up multiple web maps, please refer to the following prerequisites:

✓ PREREQUISITES:

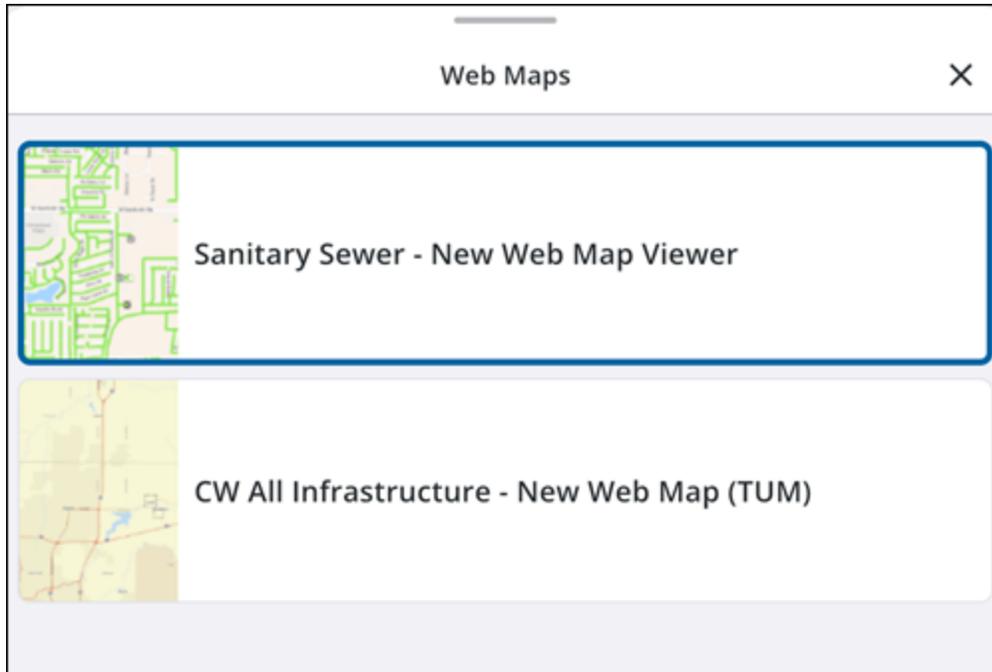
- **ArcGIS Web Map Access:**
 - You must have access to the web maps in ArcGIS. See [Share a web map](#) on Esri's website for more information.
- **Service Definition Configuration:**
 - In Admin, the web maps must be added to the **Map Services** list under the relevant **Service Definition**. Confirm that **Mobile** is selected for the web map when adding new **Map Services**. See [Add Services to a Service Definition](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- **Default Web Map Designation:**
 - The default web map for a user is indicated in Admin under **General > Employees > General tab > Map Services Definition**. See [Employee Fields](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

1. On the map, tap the **More Actions** icon.

The **More Actions** menu appears.

2. Tap **Web Maps**.

The **Web Maps** panel appears with the current web map highlighted.



3. Select a web map to use.

The web map updates.

Offline Map Areas

You can create and download multiple offline map areas associated to a single web map in advance to have map views while disconnected from the internet and improve offline workflows. After an offline map area has been created, you can download it, view its file size and sync status, switch between different areas, refresh it for the latest updates, and clear it from your device.

★ **BEST PRACTICE:** Follow these requirements when creating an offline map area from an Esri webmap for use with Trimble Unity Field. See [Take web maps offline](#) on Esri's website for more information on how to create offline map areas.

- The feature service and base map used in the webmap should be available for offline download.
- The feature service should be sync-enabled and the basemap must support offline download.
- The web map should not have any map services included.

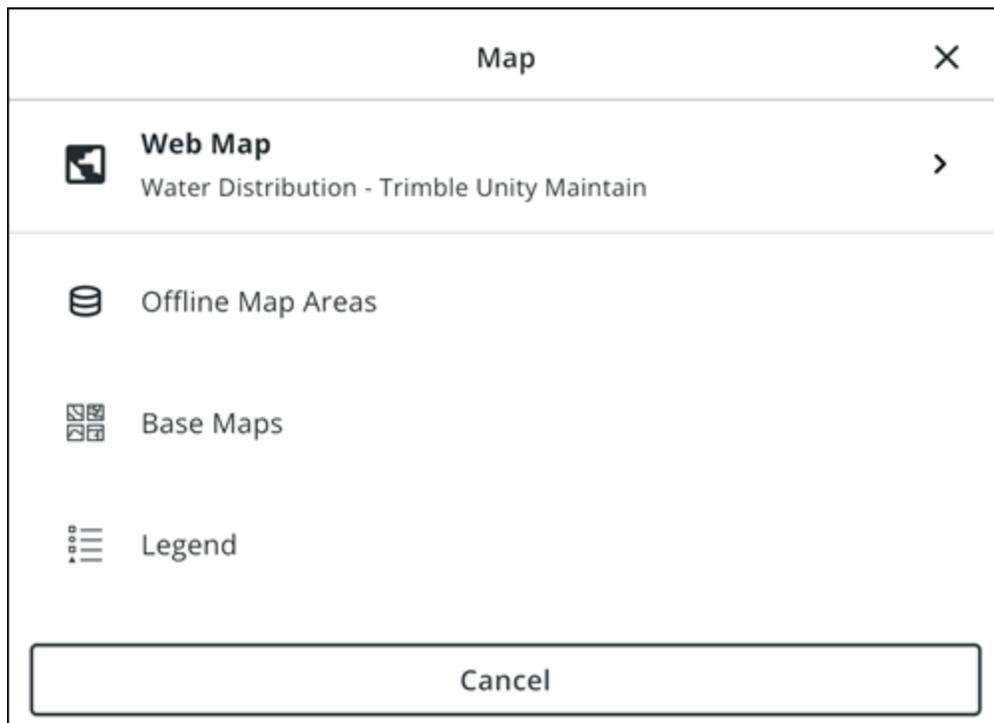
View Offline Map Areas

You can view the offline map areas that are available for download from the map. The offline map areas configured for the web map are listed here.

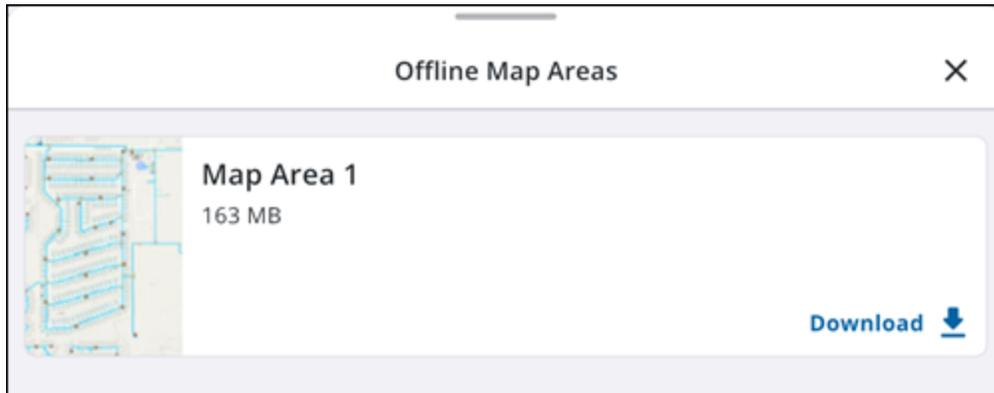
1. On the map, tap the **More Actions** icon.



2. Tap **Offline Map Areas**.



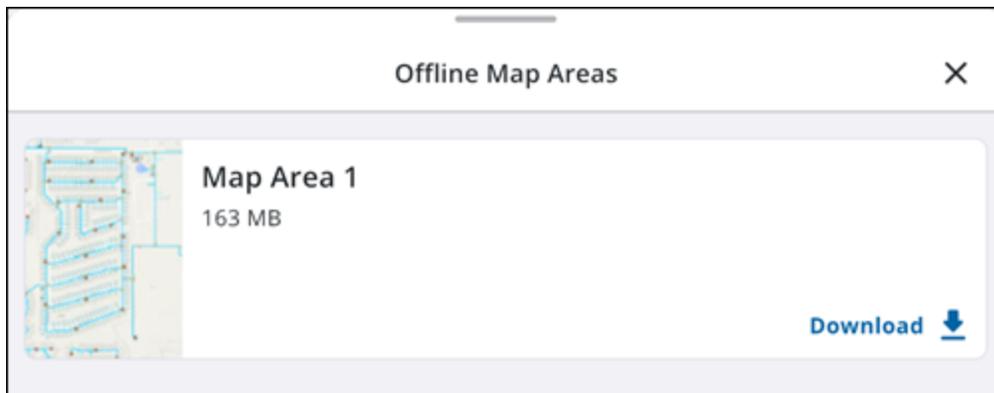
The **Offline Map Areas** panel opens, displaying the available offline map areas and their respective file sizes.



Download Offline Map Areas

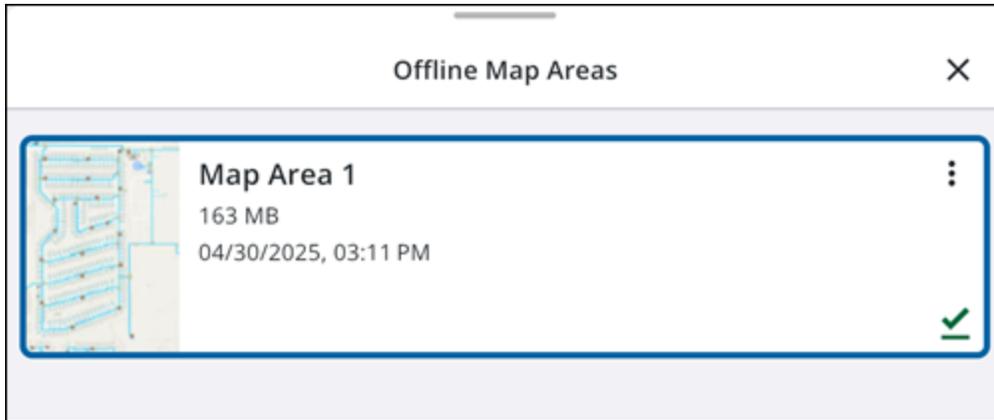
You can download offline map areas.

1. Tap **Download** to download the offline map area.



After an offline map area is downloaded, the card displays the file size and the date it was last updated and you can access the **More Actions** menu.

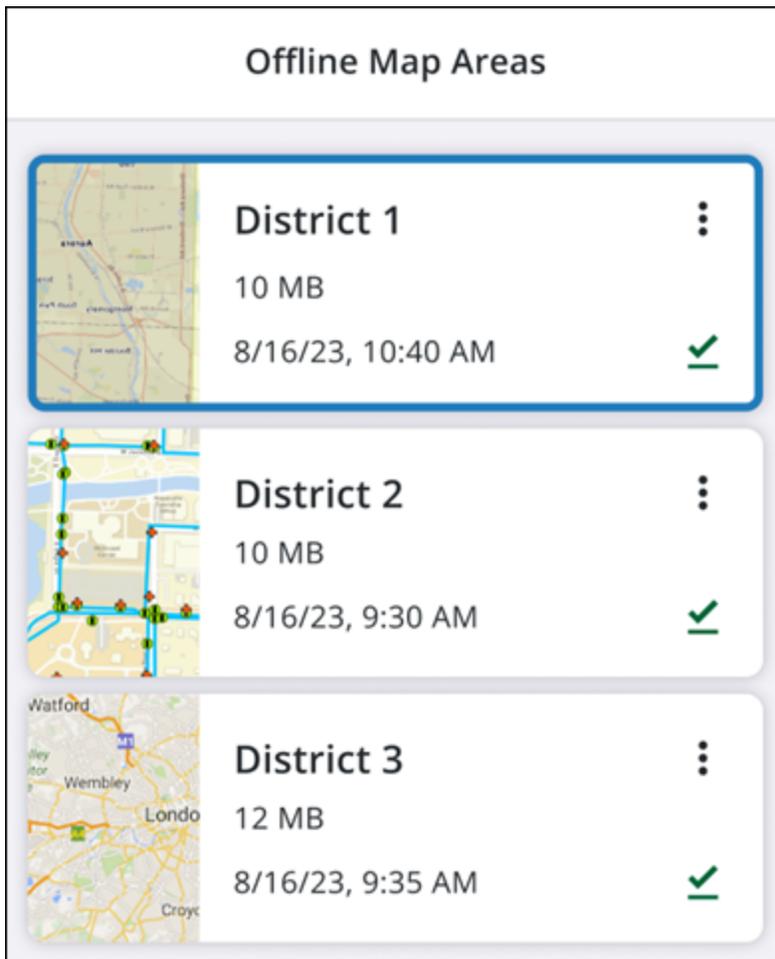
- **More Actions** icon: Tap to access more actions.
 - **Clear Downloads**: Tap to clear the downloaded offline map area.
 - **Refresh**: Tap to refresh the offline map area with the latest changes.
- **X** icon: Tap to close the **Offline Map Areas** panel.



Switch Offline Map Areas

You can switch between different downloaded offline map areas to make one active for display.

1. To switch between different offline map areas, tap the desired offline map area.

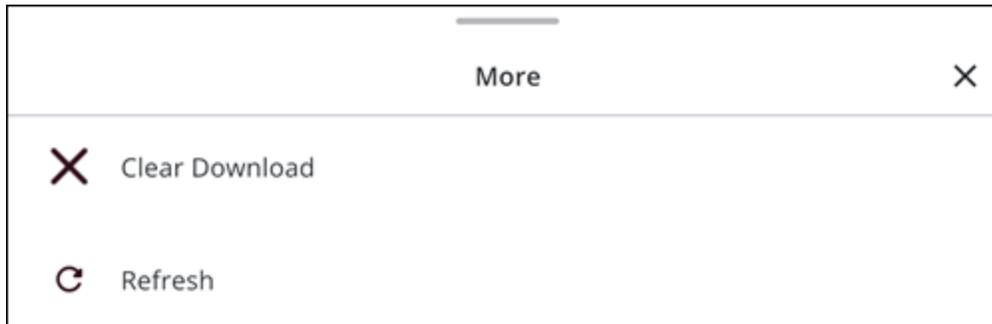


The selected downloaded map displays and becomes the active map.

Refresh Offline Map Areas

You can refresh an offline map area to sync updates to or from ArcGIS Enterprise/ArcGIS Online.

1. Tap the **More Actions** icon next to the desired offline map area.
2. Tap **Refresh**.

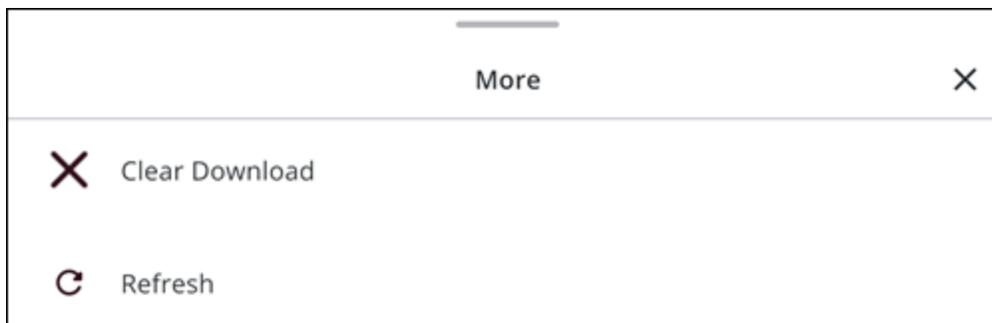


The offline map area is refreshed and displays an updated timestamp of the last sync time.

Clear Offline Map Areas

You can clear an offline map area so it is no longer downloaded onto the device.

1. Tap the **More Actions** icon next to the offline map area you wish to clear.
2. Tap **Clear Download**.



The offline map area download is cleared and the map area returns to the default state.

To clear an offline map cache, see "Clear the Offline Map Cache" on page 37.

Switch Base Maps

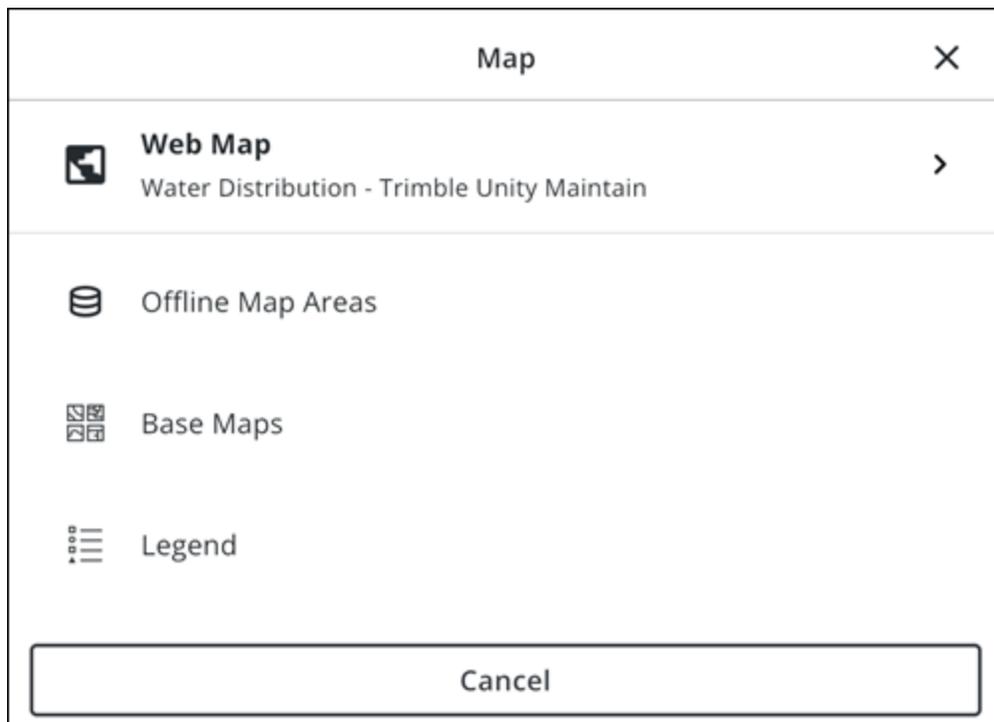
You can switch between available ArcGIS Online base maps and choose the base map that best suits your immediate needs, whether it's high resolution imagery for detailed inspections, a topographic map for understanding terrain, or a street map for navigation. When connected to the internet, base maps can be changed at any time to better account for current conditions and visibility.

✓ **PREREQUISITES:**

- You must be connected to the internet to switch base maps. For offline map area use, see "Offline Map Areas" on page 179.

1. On the map, tap the **More Actions** icon.

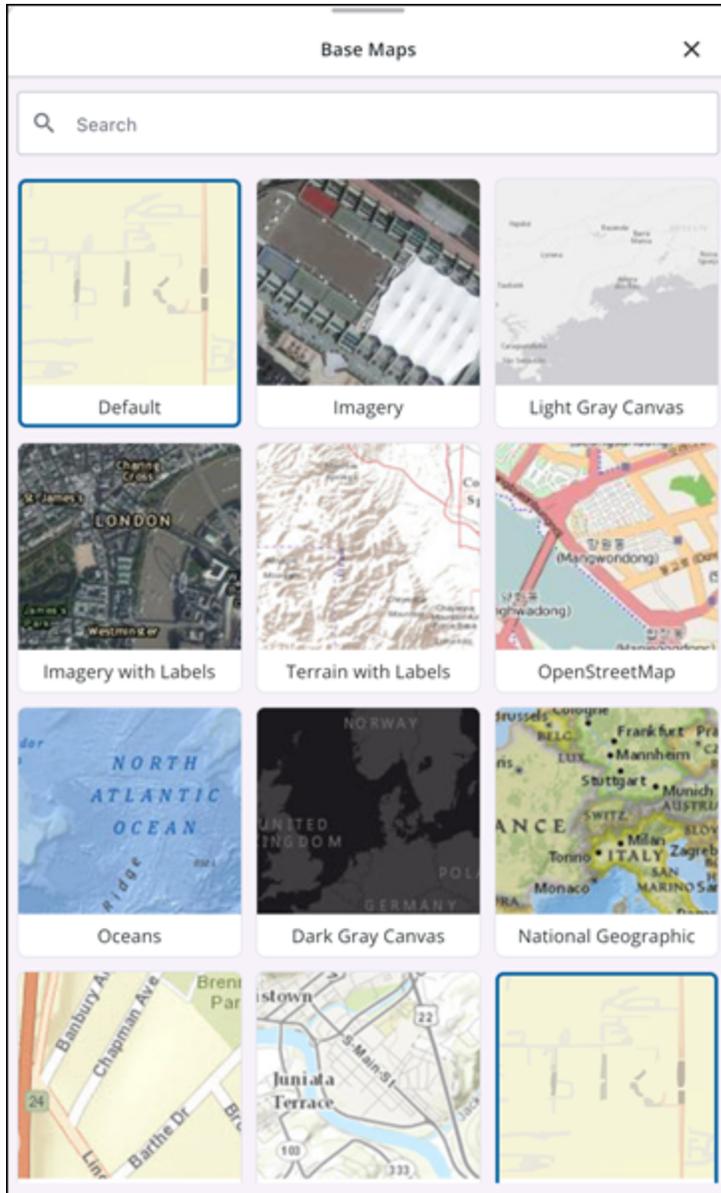
The **More Actions** menu appears.



2. Tap **Base Maps**.

The **Base Map Selection Tool** appears.

- **Search:** Tap to search for a base map.



3. Select a base map to use.

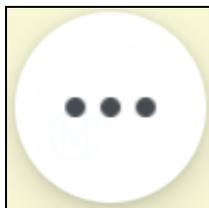
The base map updates.

NOTE: Only one base map can be taken offline as part of the configured offline map area, but users can switch between base maps when connected to the internet.

View Legend and Symbology Details

You can view the legend for the web map to better understand the symbols used for asset and activity layers. By displaying the layer list and associated symbology, you can quickly and accurately interpret the different features and assets to minimize the risk of error and remove ambiguity.

1. On the map, tap the **More Actions** icon.

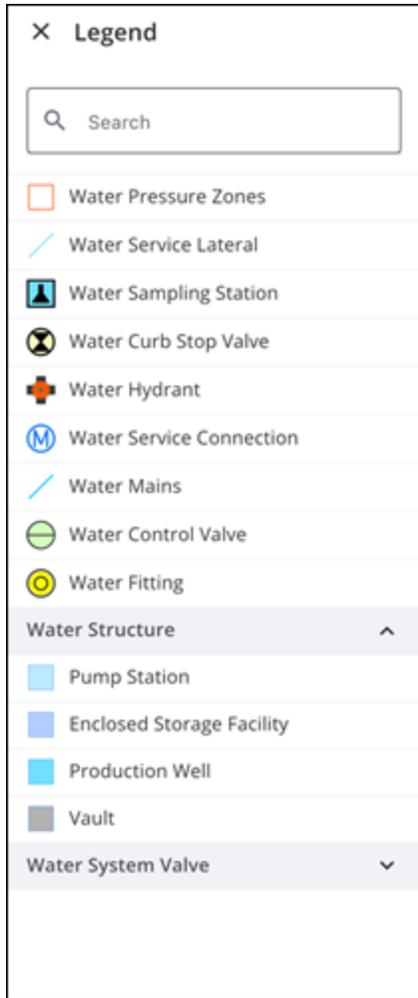


2. Tap **Legend**.



The legend appears, displaying map symbols and their meanings.

- **Search:** Tap to search the legend for specific layers or symbols.
- **Drop-down** icon: Tap to expand or collapse a section of the legend.



Search for Specific GIS Features

✓ PREREQUISITES:

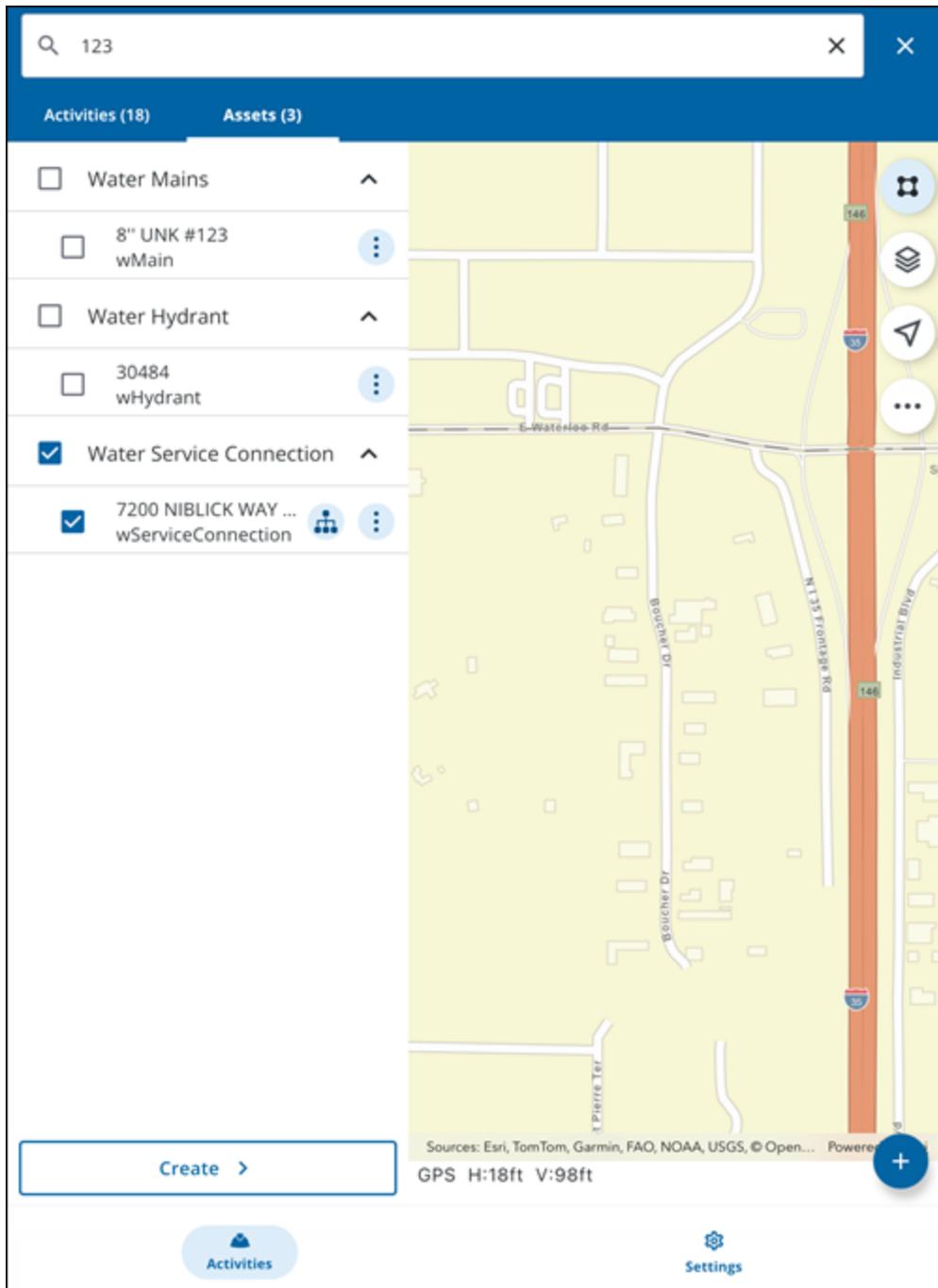
- To search for spatial and non-spatial assets or addresses in the app (both online and offline), you must first set up search functionality for your web map. This is done by configuring which layers and tables are searchable in your ArcGIS Online or ArcGIS Enterprise portal. See [Configure feature and table search for maps](#) in the ArcGIS Online documentation for more information.

You can perform a manual search for spatial or non-spatial assets to view asset history, edit asset details, or create a work activity.

1. On the top toolbar, tap the **Search** icon.



2. Tap the **Assets** list.
3. Enter in a searchable field. For example, search **40** to return assets with an **OBJECTID** of **40**.
4. Select the desired asset that appears in the **Assets** list.
 - Tap an asset to view the **Asset Details** screen.
 - **Hierarchy** icon: Tap to open the asset hierarchy, if one is available.
 - **More Actions** icon: Tap to open the **More Actions** menu.
 - **Zoom to Location**: Tap to zoom to the asset location on the map.
 - **Web**: Tap to open the selected asset in the web application.
 - **View Asset Details**: Tap to view the **Asset Details** screen. See "Asset Details" on page 93 for more information.
 - **Create**: Tap to create a new work order, inspection, or service request for the selected asset.



Search for an Address

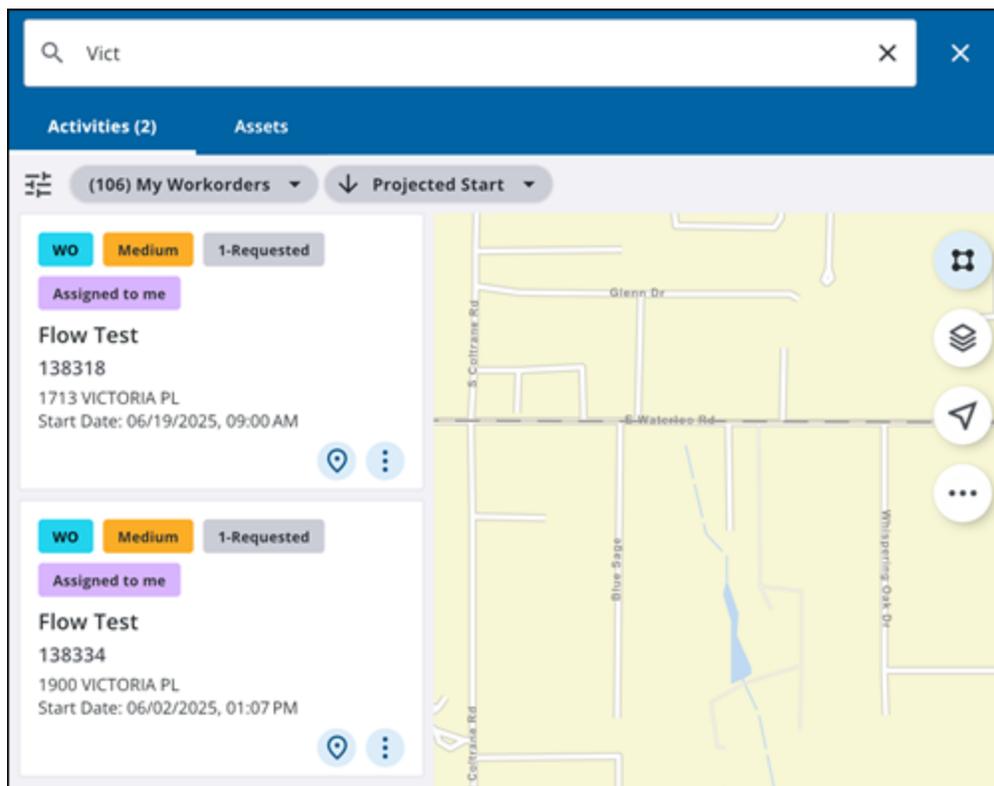
✓ PREREQUISITES:

- To search for spatial and non-spatial assets or addresses in the app (both online and offline), you must first set up search functionality for your web map. This is done by configuring which layers and tables are searchable in your ArcGIS Online or ArcGIS Enterprise portal. See [Configure feature and table search for maps](#) in the ArcGIS Online documentation for more information.

You can search for work activities that have addresses associated to them.

NOTE: If an address is manually typed in and not geocoded, it is still searchable within the activity list. An address must be associated with a work activity to search using the address.

1. Tap the **Search** icon.
2. Enter the address into the search bar.
3. Select the desired work activity that appears in the **Activities** list.



Search GIS Features Using the Barcode Scanner

✓ PREREQUISITES:

- To search for spatial and non-spatial assets or addresses in the app (both online and offline), you must first set up search functionality for your web map. This is done by configuring which layers and tables are searchable in your ArcGIS Online or ArcGIS Enterprise portal. See [Configure feature and table search for maps](#) in the ArcGIS Online documentation for more information.

You can scan linear barcodes or QR codes using the barcode scanner to quickly and accurately search for specific spatial or non-spatial assets.

1. On the top toolbar, tap the **Search** icon.

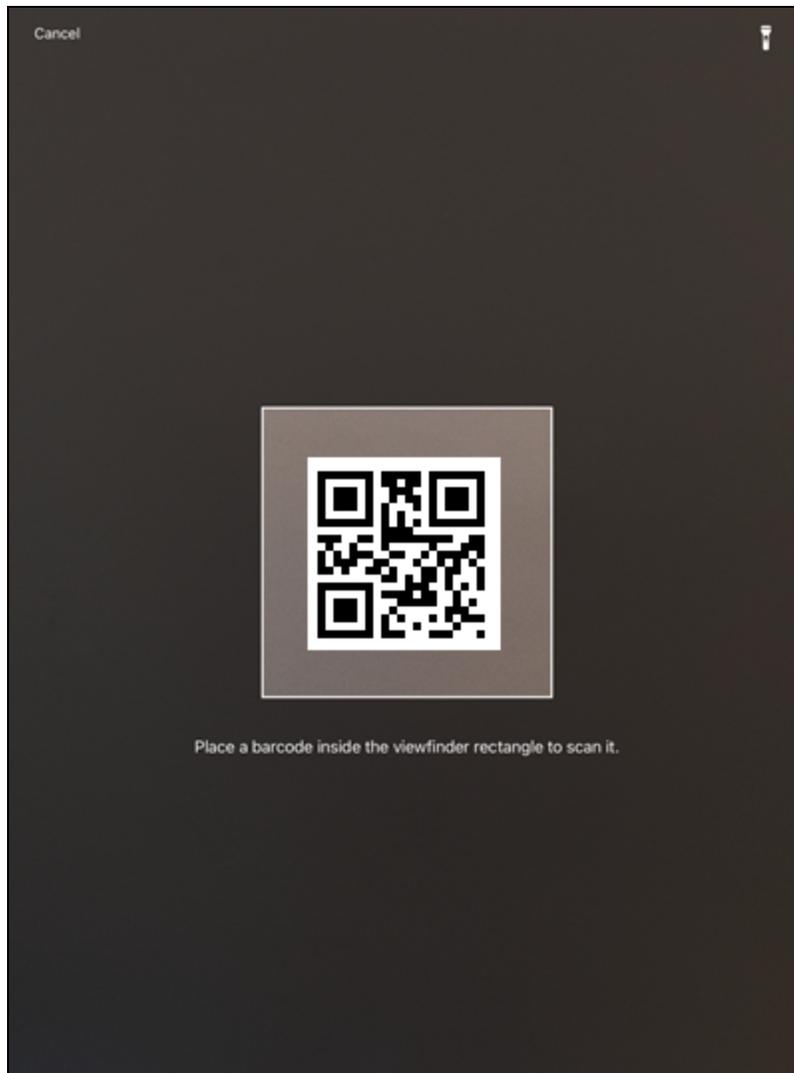


2. Tap the **Barcode Scanner** icon.



A message appears informing you that Trimble Unity Field requires camera access to continue.

3. Tap **Continue** and accept any other device permissions to allow camera access.
4. Place the linear barcode or QR code inside the viewfinder rectangle to scan it.



If there is more than one result, the results appear in the **Assets** list. See "Select Assets on the Map" on page 86 for more information.

If there is one asset, the **Asset Details** screen opens. See "Asset Details" on page 93 for more information.

Get Driving Directions to Selected GIS Features

You can get driving directions to selected GIS features on the map.

1. Open a work activity.
2. Tap **Associated Assets**.
3. Tap an asset.
4. Tap **Directions**.

The app opens your device's default map application with directions to the asset location.

Locate Selected Features Using GPS

You can locate a selected feature using GPS.

1. Tap the **Select** icon.
2. Tap and drag across the map to draw a box. Any selectable GIS features in that area are selected.

The **Assets** panel appears.



3. Swipe up on the panel to expand the list and scroll through the selected GIS feature types.
4. Tap the **More** icon beside the selected feature you wish to locate using GPS.
5. Tap **View on Map**.

The map zooms to the highlighted feature's location.

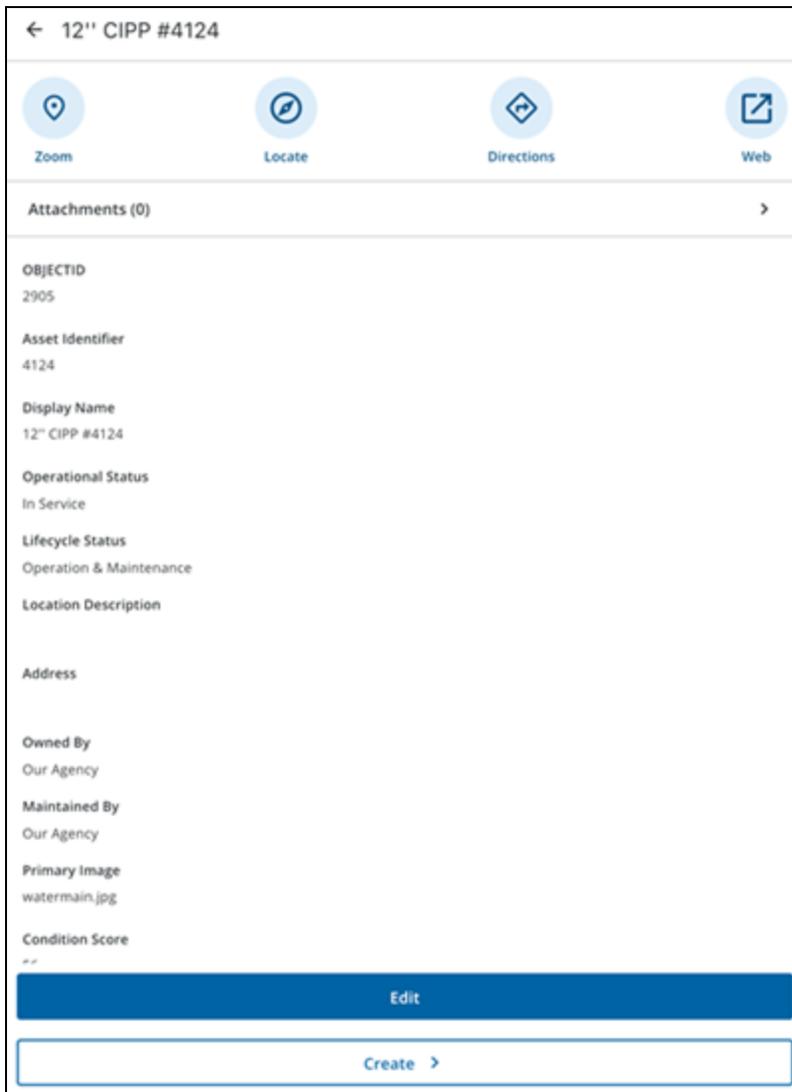
View Details of Selected GIS Features

You can view asset details and perform actions from the **Asset Details** screen.

From the map, select and open an asset to view the **Asset Details** screen. See "Select Assets on the Map" on page 86 and "Search For Assets" on page 90 for more information.

- **Zoom:** Tap to view the asset on the map.
- **Locate:** Tap to open locate for the asset.
- **Directions:** Tap to get driving directions to the asset.
- **Web:** Tap to open the asset in the web application.
- **Attachments:** Tap to view the asset attachments. This functionality is only available when connected to the internet.

- **Hierarchy:** Tap to open the asset hierarchy, if one is available.
- **Edit:** Tap to edit asset details. See "Edit GIS Feature and Asset Data " on page 163 for more information.
- **Create:** Tap to create a work activity from the asset.
 - **New Inspections:** Tap to create a new inspection.
 - **New Work Orders:** Tap to create a new work order.
 - **New Service Requests:** Tap to create a new service request.



Show Distance and Bearing and My Location On Maps

You can view your distance and bearing and location on the map.

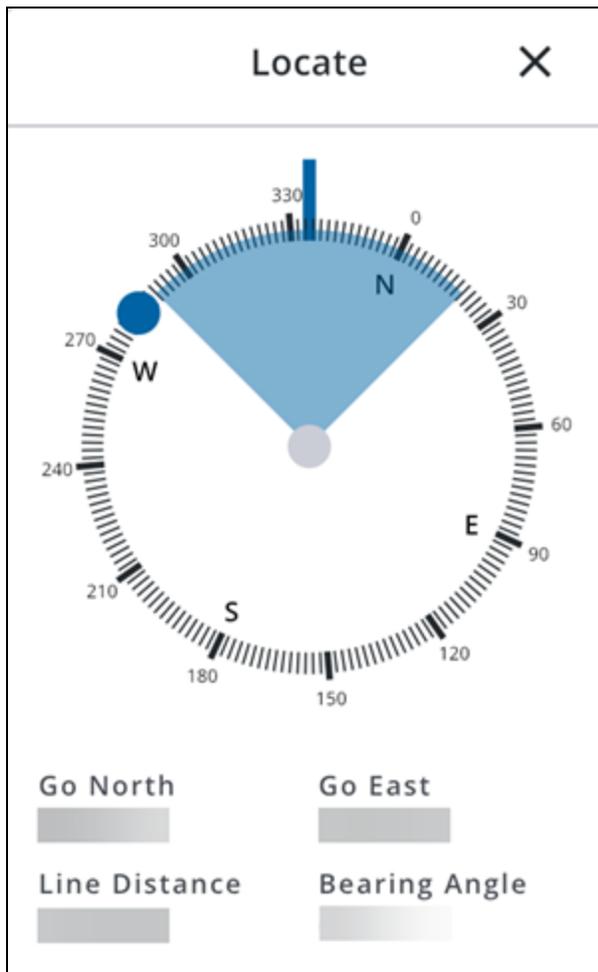
Locate

The **Locate** feature allows users to capture high accuracy positioning data.

 **NOTE:** The **Locate** feature is only as precise as the accuracy of the data collected. If the asset's location is not accurate to begin with, the Advanced Locate data will not be accurate either. For best results, ensure high accuracy for the asset's location data.

1. Open a work activity.
2. Tap **More**.
3. Tap **Locate**.

The map opens to your current location and displays the **Locate** compass with navigation directions.

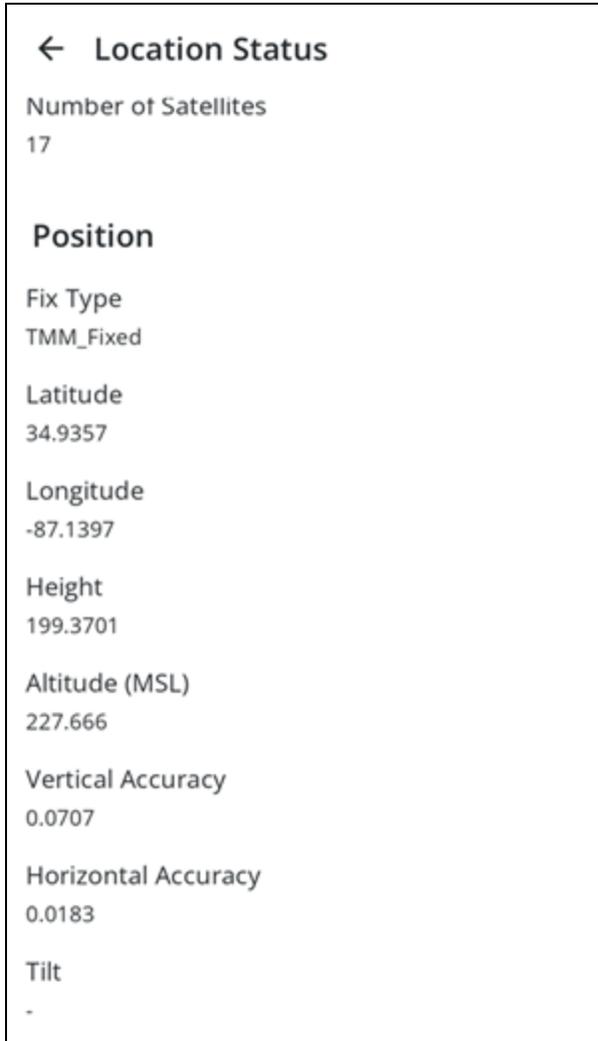


Location Status

You can view your current location status.

1. Tap **Settings**.
2. Tap **GPS**.
3. Tap **Location Status**.

Details about your current location status appear.



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Troubleshooting Issues

Confirm Single Sign-on is Configured

Single Sign-on (SSO) is required to log in to the app. If SSO is not configured for your account, you will not be able to log in.

1. Configure the Redirect URI to enable SSO. See "Configure the Redirect URI" on page 18 for more information.
2. After the Redirect URI has been configured, enable SSO for your account. See the [Single Sign-on Guide for Trimble Unity Maintain and Trimble Unity Permit](#) for more information.
3. Log in to the app using SSO. See "Log In" on page 18 for more information.

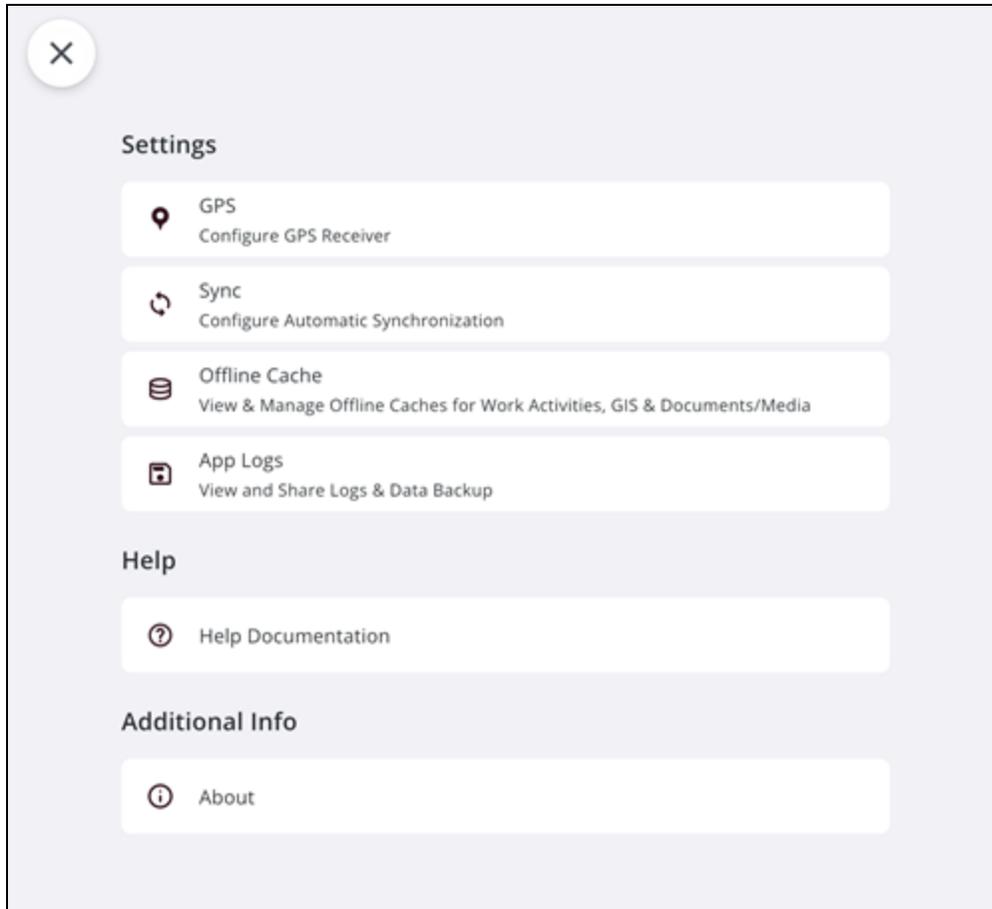
Clear the Offline Cache

Clearing the offline map area cache can resolve map display or performance issues.

1. Tap **Settings**.
2. Tap **Logout**.

A confirmation message appears to inform you that if you log out, internet access will be required to log in the next time.

3. Tap **Confirm** to log out.
4. Tap **Settings**.
5. Tap **Offline Cache**.



6. Next to **Offline Map Areas**, tap **Clear All** to clear all map areas.



A confirmation message appears to inform you that this will erase all the offline map areas from your device.

7. Tap **Clear** to confirm.

The offline map cache is cleared.

8. Tap the **Back** icon to return to the **Settings** screen.

9. Tap the **X** icon to return to the log in screen.

10. Log in to the app again. See "Log In" on page 18 for more information.

Permit Functionality is not Visible or Accessible in the App

To access Permit functionality in the app (cases, case violations, case tasks), you must first review and complete all prerequisites. If you do not have access to these settings, please contact your administrator.

✓ PREREQUISITES:

- **User and Organization Setup:**
 - You must be assigned to an employee organization. See [Add or Edit an Employee](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
 - You must be assigned to a user organization. See [Add a Permit User](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
 - Select a default organization. This organization can be the same as your user organization. If a default organization is not selected, you will not be able to utilize Trimble Unity Permit functionality in the app. See [Add a Permit User](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- **Permit Licensing and Role:**
 - You must be licensed for Unity Permit Case API Extended and Unity Permit Edit + in Trimble Unity Admin. See [Assign Licensing](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
 - To access Code Enforcement Inspection cases, you must be assigned to the **Inspector** role. See [Make a User an Inspector](#) in the Admin Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.
- **ArcGIS Advanced Editing License:**
 - You must have an ArcGIS Advanced Editing license to edit parcels. If you do not have this license, you will not be able to make any changes to asset details and an error will appear informing you that your ArcGIS license does not support editing of this feature and an Advanced Editing license is required. Please contact your administrator or see [Introducing the ArcGIS Advanced Editing user type extension](#) on Esri's website for more information.

Contact Support

To provide feedback, report issues, and request support, contact your Administrator and have them reach out to your Trimble Unity Field Customer Support Manager.