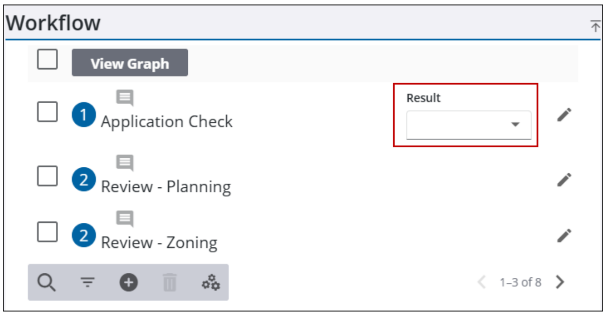
Trimble Unity

Manage Tasks in the Workflow Panel

The **Workflow** panel lists the tasks required to complete the case, ordered by milestone.

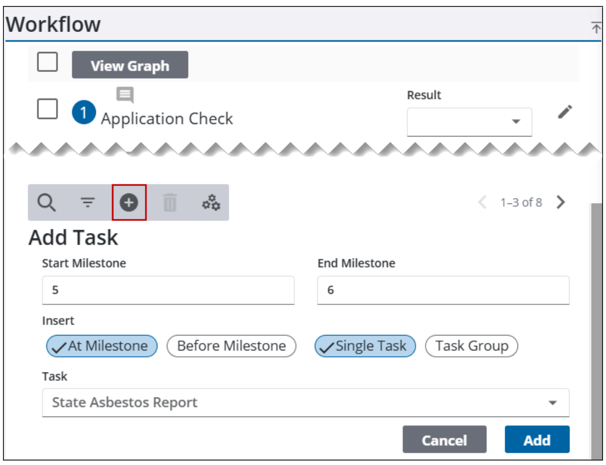
1. Open a case and navigate to the **Workflow** panel.
2. To complete a task and move the case forward, select a task result from the **Result** drop-down list.



TIP: You can also complete a task from the **Edit Task** panel or by using **Task Manager**.

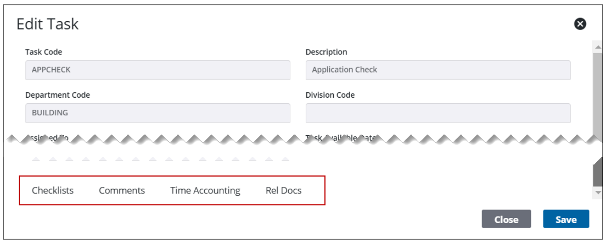
Administrators can configure cases to re-insert tasks under certain conditions, and you can manually add tasks as needed.

3. To add a task, click **Add record**.
4. Complete the milestone information, select the desired task or task group, and click **Add**.



For each task, you can attach documents, add comments, track time, and create checklists.

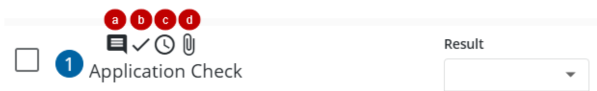
5. Click **Edit Task** to open the **Edit Task** panel.
6. Select an option at the bottom of the **Edit Task** panel to add or edit information.



7. Click **Save** to update the task, and click **Close** to return to the case summary page.

An icon next to the task on the **Workflow** panel indicates there is more information and/or incomplete checklists.

NOTE: You must complete any checklists for a task before moving to the next task. See Complete Checklists in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.



a. Comments
b. Checklists
c. Time Accounting
d. Related Documents