

Search for Tasks

You can search for tasks on a case from the **Workflow** panel or page, or use **Task Manager** or the **Task Utility** tool.

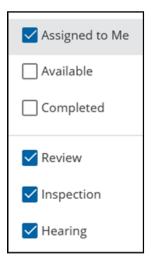
TIP: You may need to add a menu item in order to access the Task

Manager and Task Utility tool. See

Add Menu Items in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

Workflow Panel/Page

- Open a case and either navigate to the Workflow panel or click Workflow from the activity toolbar to open the Workflow page.
- Click Filter Task to filter tasks by task type, availability, completion status, or assignment to the current user. All task types are selected by default.



3. The **Workflow** panel refreshes showing only tasks matching your search criteria.

Task Manager

Use **Task Manager** to locate tasks assigned to a user by date range.

- Open the Task Manager page.
- The Login Id defaults to the user's login but can be changed using the drop-down list. Clear the Login Id field to search for tasks solely by Date Range.
- Click the calendar icon and choose from Today, This Week, This Month, This Year, or a custom time period.
- Click Apply. The search results automatically update based on the criteria entered.



Task Utility

The **Task Utility** tool provides an alternative way to access and update information on tasks.

- 1. Open the Task Utility page.
- 2. Enter search criteria, such as the case number or case type, and click **Search**.
- Select a case from the results and click Actions to open the Task Action panel.
- 4. Select one or more tasks to remove tasks, time accounting data, and comments, as well as reopen tasks on a case.
- 5. Select **Update** to save the changes.

