

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

1. Open a case and either navigate to the **Workflow** panel or click **Workflow** from the activity toolbar to open the **Workflow** page.
2. 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.

☒ Assigned to Me

☐ Available
 ☐ Completed

☒ Review
 ☒ Inspection
 ☒ Hearing

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.

1. Open the **Task Manager** page.
2. 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**.
3. Click the calendar icon and choose from **Today**, **This Week**, **This Month**, **This Year**, or a custom time period.
4. Click **Apply**. The search results automatically update based on the criteria entered.

Today
This Week
This Month
This Year

Date Start
Feb 24, 2025

Date End
Feb 24, 2025

Clear
Apply

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**.
3. 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.

Task Description
Result Code
Task Available
Target End
Completed Date

☒ Notice of Violation
05/28/2024
05/29/2024

☐ Re-inspection (7 days)

☒ Delete Selected Task
☐ Reopen Selected Task
☐ Delete Time Accounting Data
☐ Delete Task Comments

Close
Update