

# Trimble Unity Web App v4.X – Training Guide



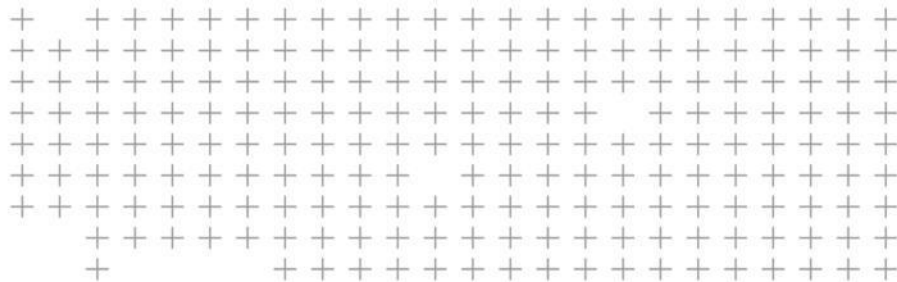
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## **Administration**

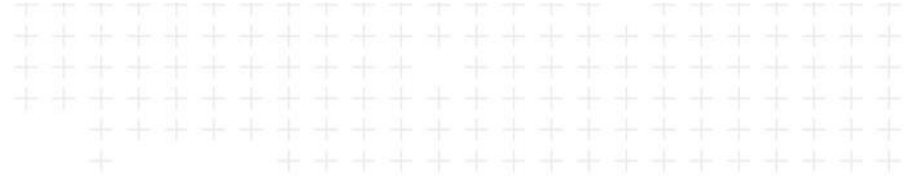
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# UI Elements



# Login Screen



Trimble Unity

Organization

Required

NEXT

1. Enter your Organization name, and select 'NEXT'

Trimble Unity

maber

.....

LOGIN

Organization set to DEMO [Change?](#)

2. Enter your User Name and Password, and select 'LOGIN'



# App Selector

≡ **Trimble Unity** | App Selector

## App Drawer

Access to Admin Screen  
and other options



MP Hydrant Inspec  
Demo



WW Flow Monitor  
WW Flow Monitoring



Leak Reporting  
Leak Reporting App



Wastewater Mapper  
Wastewater Mapper



Change out  
Meter Change Out



Stormwater Mapper  
Stormwater Mapper



Non Revenue Water  
App for non revenue water maintenance



Valve Inspector  
Valve Inspection



List of Apps you  
have access to  
Simply click on the app to  
open it



# App Details

Lists and Filters

Search, Selection and  
Map Tools

The screenshot displays the Trimble Unity Pressure Monitor application interface. The top navigation bar includes the app name, a hamburger menu, and tabs for DASHBOARD, WORK ORDER (36), MONITORING SITES (14), and ALARMS (576). Below the navigation bar, there are filters for Status (Active), Type (5), and All Priority, along with a 'MORE FILTERS' link and a 'Saved Filters: Pressure Alarms' button. A search bar is located in the top right corner.

The main content area is divided into three sections:

- List Area:** A list of transient alarms on the left side. The first item is highlighted in blue. A callout indicates that the list will change based on the selected filter.
- GIS Map:** A map in the center showing the location of the selected alarm. A callout identifies this as the GIS Map.
- Details Pane:** A panel on the right showing details for the selected alarm (HYD-1026.9314: Transient). It includes fields for Type, Status, Description, Alarm date/time, and Intensity. A callout indicates that this pane shows details of the selected object.

Additional elements include a 'Sort By: lastUpdated' dropdown, a 'Find address or place' search bar, and a 'Details Pane' callout.

**List Area**  
List will change depending on list chosen above

**GIS Map**

**Details Pane**  
Shows details of object selected on list

**Trimble Unity Pressure Monitor**

DASHBOARD WORK ORDER (36) MONITORING SITES (14) ALARMS (576)

Status: Active Type: 5 All Priority MORE FILTERS Saved Filters: Pressure Alarms

Search...

Sort By: lastUpdated

Find address or place

HYD-1026.9314: Transient  
Jun 21, 2018 12:13 PM  
Active

HYD-1026.9312: Transient  
Jun 21, 2018 11:03:31 AM  
Active

HYD-1026.9313: Transient  
Jun 21, 2018 11:03:31 AM  
Active

HYD-431.9311: Transient  
Jun 21, 2018 9:48:38 AM  
Active

HYD-1026.9307: Transient  
Jun 21, 2018 9:24:04 AM  
Active

HYD-526.9310: Transient  
Jun 21, 2018 9:02:55 AM  
Active

HYD-1026.9308: Transient  
Jun 21, 2018 9:02:52 AM  
Active

HYD-218.9309: Transient  
Jun 21, 2018 9:02:51 AM  
Active

HYD-741.9306: Transient  
Jun 21, 2018 9:02:48 AM  
Active

HYD-1026.9314: Transient  
Transient

Type: Transient  
Status: Active  
Description: HYD-1026.9314: Transient  
Alarm date/time: 6/21/2018 12:13 PM  
Intensity:

CREATE WORK VIEW ON MAP

ACKNOWLEDGE

Notes

Add Note

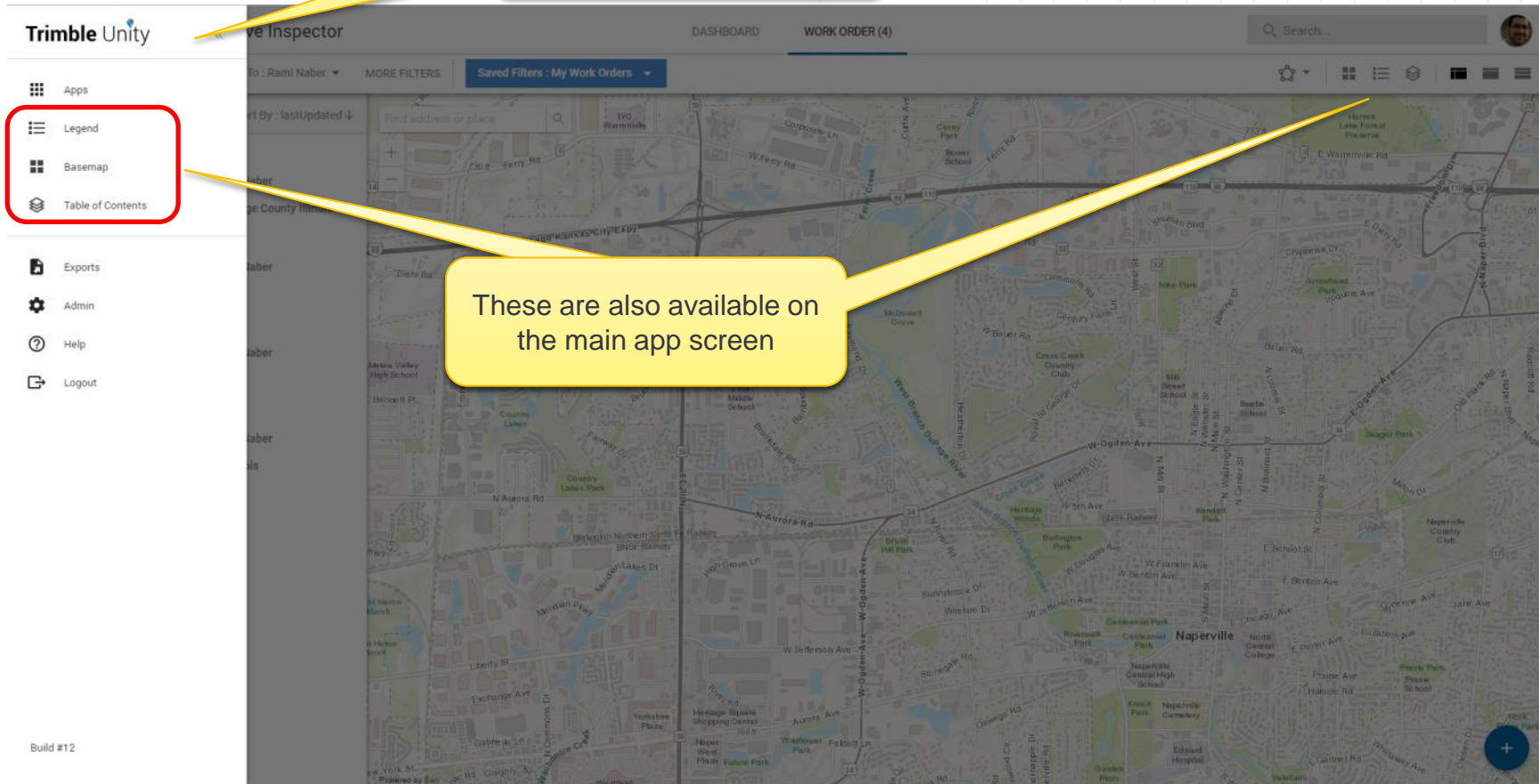
This Transient has no notes

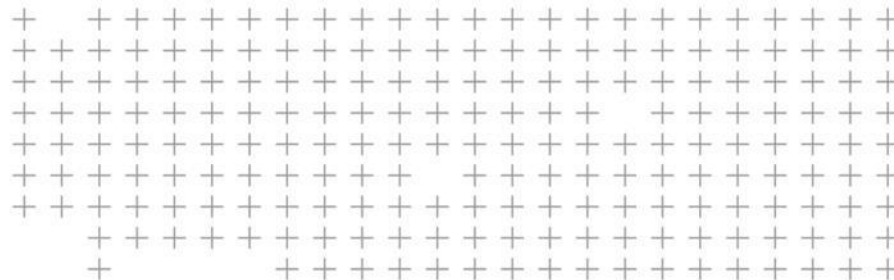
Forms (0)

This Transient has no forms

# App Drawer

App Drawer  
Provides access to various  
screens and options





# Map Tools

# Map Tools – Table of Contents (ToC)

Toggle ToC  
Table of Contents is the term  
used for the list of layers  
available on the map

The screenshot displays the Trimble Unity software interface. The top navigation bar includes the Trimble Unity logo, the project name 'Valve Inspector', and a 'WORK ORDER (4)' indicator. Below the navigation bar, there are filters for 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'MORE FILTERS'. A 'Saved Filters: My Work Orders' button is also present. The main map area shows a street map of Naperville, Illinois, with various landmarks and roads labeled. On the left side, there is a list of work orders with details such as 'az 06-01 1558', 'Valve Inspector • Assigned To Rami Naber', 'On Site • 2 Assets', and '1025 Forest View Ct Naperville DuPage County Illinois'. On the right side, a 'Table of Contents' panel is open, showing a list of layers with checkboxes for visibility. The layers include 'Work Order', 'Crew', 'Network Assets', 'Water Test Stations', 'Water Sampling Stations', 'Water Service Connections', 'Water Hydrants', 'Water Pumps', 'Water Network Structures', 'Water Control Valves', 'Water Curb Stop Valves', 'Water Fittings', 'Water Mains', 'Water Lateral Lines', 'Water Casings', 'Water Structures', and 'Water Valves'. The 'Table of Contents' panel also has an 'EDIT SELECTION' button. A 'Search...' bar is located at the top right of the map area. A 'Sort By: lastUpdated' dropdown is located at the top left of the map area. A 'Find address or place' search bar is located at the top center of the map area. A 'DASHBOARD' button is located at the top center of the map area. A 'WORK ORDER (4)' button is located at the top center of the map area. A 'Toggle ToC' button is located at the top right of the map area. A 'Toggle layer visibility' button is located at the top right of the map area. A 'Drill down list of layers' button is located at the top right of the map area. A 'View layer symbology' button is located at the top right of the map area. A 'Toggle ToC' button is located at the top right of the map area. A 'Toggle layer visibility' button is located at the top right of the map area. A 'Drill down list of layers' button is located at the top right of the map area. A 'View layer symbology' button is located at the top right of the map area.

**Edit selectable layers**  
Allows you to select which layers should be visible by default or selectable

**Drill down list of layers**  
Click on ▶ to show/hide more layers

**Toggle layer visibility**  
Click on checkbox to show/hide layer on map

**View layer symbology**

**Table of Contents** EDIT SELECTION

- ☒ Work Order
- ☐ Crew
- ☒ Network Assets
  - ☐ Water Test Stations
  - ☐ Water Sampling Stations
  - ☒ Water Service Connections
  - ☒ Water Hydrants
  - ☐ Water Pumps
  - ☐ Water Network Structures
  - ☐ Water Control Valves
  - ☐ Water Curb Stop Valves
  - ☐ Water Fittings
  - ☒ Water Mains
  - ☒ Water Lateral Lines
  - ☐ Water Casings
  - ☐ Water Structures
  - ☒ Water Valves

Hydrant Valve

- ☒ False
- ☒ True
- ☒ <all other values>

☐ Forms



# Map Tools – ToC Selectable Layers

az 06-01 1558

Valve Inspector • Assigned To Rami Naber

On Site • 2 Assets

1025 Forest View Ct Naperville DuPage County Illinois

IOS 06-04 2247

Valve Inspector • Assigned To Rami Naber

Opened • 1 Assets

Address not set

IOS 06-03 1655

Valve Inspector • Assigned To Rami Naber

Opened • 1 Assets

Address not set

Need inspection

Valve Inspector • Assigned To Rami Naber

Opened • 0 Assets

1329 Branchwood Cir Naperville Illinois

Find address or place

Map

Change the default layer selection for features that can be selected using the mouse click or map selection tools

UPDATE SELECTABLE LAYERS

RESET

	<input type="checkbox"/> Visible	<input type="checkbox"/> Selectable
Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	<input type="checkbox"/>	<input type="checkbox"/>
Network Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water Test Stations	<input type="checkbox"/>	<input type="checkbox"/>
Water Sampling Stations	<input type="checkbox"/>	<input type="checkbox"/>
Water Service Connections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water Hydrants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water Pumps	<input type="checkbox"/>	<input type="checkbox"/>
Water Network Structures	<input type="checkbox"/>	<input type="checkbox"/>
Water Control Valves	<input type="checkbox"/>	<input type="checkbox"/>
Water Curb Stop Valves	<input type="checkbox"/>	<input type="checkbox"/>
Water Fittings	<input type="checkbox"/>	<input type="checkbox"/>
Water Mains	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water Lateral Lines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water Casings	<input type="checkbox"/>	<input type="checkbox"/>
Water Structures	<input type="checkbox"/>	<input type="checkbox"/>
Water Valves	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forms	<input type="checkbox"/>	<input type="checkbox"/>

# Map Tools – Legend

Toggle Legend

Trimble Unity | Valve Inspector

DASHBOARD WORK ORDER (4)

All Priority ▼ Status (4) ▼ Assigned To: Rami Naber ▼ MORE FILTERS Saved Filters: My Work Orders ▼

Sort By: lastUpdated ↓

Find address or place

az 06-01 1558  
Valve Inspector • Assigned To Rami Naber  
On Site • 2 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

ios 06-04 2247  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

ios 06-03 1655  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

Need inspection  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

Legend

- Cancelled
- Under Review
- Supply Interrupted
- Supply Restored
- Leak Found

Water Service Connections

Water Hydrants

Operable

- Out of Service
- In Service

Water Mains

Water Lateral Lines

Water Valves

Hydrant Valve

- False
- True
- <all other values>

View symbology of visible layers on the map

# Map Tools – Basemaps

Toggle Basemap Selection

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (4)'. Below the navigation bar, there are filters for 'All Priority', 'Status (4)', and 'Assigned To: Rami Naber', along with a 'MORE FILTERS' button and a 'Saved Filters: My Work Orders' dropdown. The main map area shows a street map with a blue network overlay. A yellow callout points to the 'Basemaps' panel on the right, which displays three options: 'ESRI World Street', 'ESRI Aerial', and 'ESRI Topo'. A yellow callout also points to the map area, stating 'Choose basemap from list of configured basemaps for the app'. The left sidebar lists four work orders:

- az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 2 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- iOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- iOS 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

The bottom right corner features a blue circular button with a white plus sign.



# Map Tools – Address Search

The screenshot displays the Trimble Unity Valve Inspector interface. At the top, the navigation bar includes the Trimble logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (4)'. A search bar is located in the top right corner. Below the navigation bar, there are filter options: 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'MORE FILTERS'. A 'Saved Filters: My Work Orders' button is also present. The main area is divided into a left sidebar and a central map. The sidebar lists several work orders with their status and location details. The central map shows a street view with several blue location pins. A yellow callout box points to the search results list, which is titled '800 s loomis'. The list contains several addresses, with the first one being '800 S Loomis St, Naperville, IL, 60540, USA'. A yellow callout box also points to the map, stating: 'See address candidate results as you type. Select one to view on map. Press on Return key to go to the first on the list. Map zooms to selected location'. A zoomed-in view of the selected address is shown in the bottom left corner, displaying '800 S Loomis St, Naperville, Illinois, 60540' and a 'Zoom to' button.

**Trimble Unity** | Valve Inspector

DASHBOARD | WORK ORDER (4)

Search...

All Priority | Status (4) | Assigned To: Rami Naber | MORE FILTERS | Saved Filters: My Work Orders

Sort By: lastUpdated ↓

**az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 2 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

**iOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**iOS 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

800 s loomis

800 S Loomis St, Naperville, IL, 60540, USA

800 N Loomis St, Naperville, IL, 60563, USA

800 S Loomis St, Chicago, IL, 60607, USA

800 S Loomis Rd, Mount Pleasant, MI, 48858, USA

800 Loomis St, Rockford, IL, 61102, USA

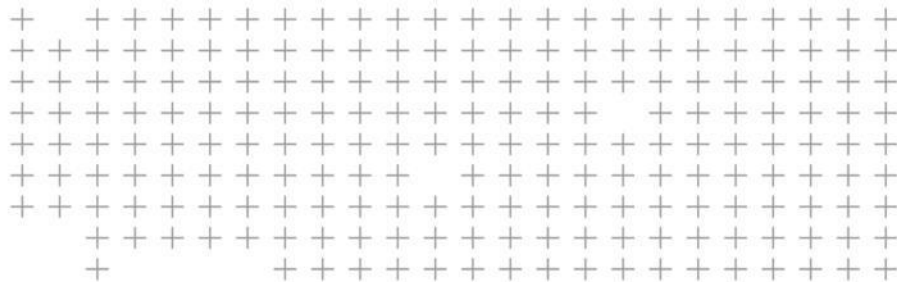
800 W Loomis St, Ludington, MI, 49631, USA

E JEFFERSON AVE

See address candidate results as you type.  
Select one to view on map  
Press on Return key to go to the first on the list.  
Map zooms to selected location

800 S Loomis St, Naperville, Illinois, 60540

Zoom to



# Map Selection

# Map Selection – Mouse Click

RESULTS option only appears when you click on the map

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes 'Trimble Unity | Valve Inspector', 'DASHBOARD', 'WORK ORDER (4)', and 'RESULTS (6)'. A search bar is located on the right. The left sidebar contains a list of layers: 'Water Valves (1)' with 'WSVAL-4089' selected, 'Work Order (1)' with 'az 06-01 1558', 'Water Mains (3)' with 'WM-806', 'WM-3593', and 'WM-3594', and 'Water Lateral Lines' with 'WL-7742'. The central map shows a street view with a blue circle highlighting a specific water valve. The right pane, titled 'WSVAL-4089 Water Valves', displays detailed information for the selected valve.

**Selection Results Categorized by layer**

A single click on the map shows the results of all selectable layers on the Results pane. Everything selectable under the shaded circle will be returned.

**Details of feature selected from the Results pane**  
If only one object is returned the details area will be automatically populated

WSVAL-4089 Water Valves	
OBJECTID:	2236
Facility Identifier:	WSVAL-4089
Install Date:	12/31/1977 4:00 PM
Location:	434.78 Feet Along Water Mains With
Description:	Facility Identifier Of WM-806
Rotation:	331.2814
Diameter:	6"
Valve Type:	Gate
Bypass Valve:	False
Clockwise To Close:	True
Normally Open:	True
Turns To Close:	12
Operable:	True
Hydrant Valve:	False
Currently Open:	True
Enabled:	True
Active Flag:	True
Owned By:	Our Agency
Managed By:	Our Agency
Last Update Date:	5/18/2015 2:35 AM
Last Editor:	Esri
Globalid:	(025F3DEF-A3C5-41A7-9A9B-A425853204CB)

# Map Selection – Polygon

**Trimble Unity** | Change out

DASHBOARD WORK ORDER (5) RESULTS (43)

Search...

Back

Select 'Back' if you need to redraw the polygon or line

1. Chose Polygon selection tool

2. Draw polygon then double click to complete selection  
To draw the polygon, single click to select the vertices of the polygon, or click, hold down, and drag

3. Selection Results Categorized by layer

Find address or place

Water Service Connections (17)

- WSRV-347
- WSRV-1262
- WSRV-1764
- WSRV-2224
- WSRV-2663
- WSRV-3120
- WSRV-3122
- WSRV-3995
- WSRV-6198
- WSRV-7002
- WSRV-1765

Water Hydrants (1)

Water Mains (6)

Water Lateral Lines (25)

Powered by Esri

# Map Selection – Line

The screenshot displays the Trimble Unity web application interface. The top navigation bar includes the Trimble Unity logo, a 'Change out' button, and tabs for 'DASHBOARD', 'WORK ORDER (5)', and 'RESULTS (25)'. A search bar is located on the right side of the top bar. The left sidebar contains a list of layers: 'Water Service Connections (11)', 'Water Mains (2)', and 'Water Lateral Lines (12)'. The main map area shows a street map with a blue line drawn across it. A yellow callout box with the text '1. Chose Line selection tool' points to the top right corner of the map. Another yellow callout box with the text '2, Draw line then double click to complete selection' points to the blue line on the map. A third yellow callout box with the text '3. Selection Results Categorized by layer' points to the layer list in the sidebar. The map also features a search bar and a 'Back' button in the top left corner.

Trimble Unity | Change out

DASHBOARD WORK ORDER (5) RESULTS (25)

Search...

Back

Find address or place

Water Service Connections (11)

WSRV-347

WSRV-1262

WSRV-1764

WSRV-2224

WSRV-2663

WSRV-3120

WSRV-3122

WSRV-3995

WSRV-6198

WSRV-7002

WSRV-1765

Water Mains (2)

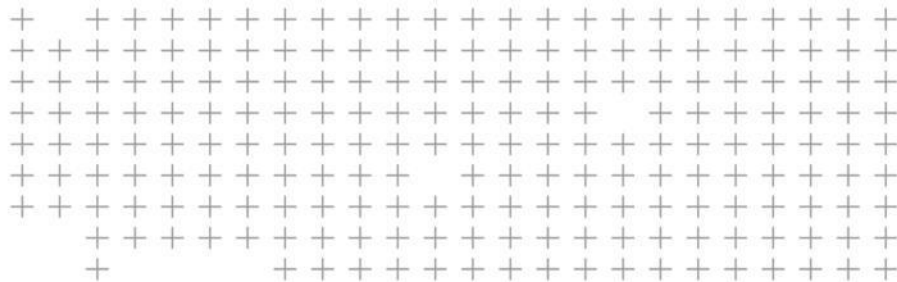
Water Lateral Lines (12)

1. Chose Line selection tool

2, Draw line then double click to complete selection

3. Selection Results Categorized by layer

Powered by Esri



# Quick Search



# Quick Search

1. Input search string.  
Examples: Asset Id, Work Order  
Press on Return key

The screenshot shows the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD', 'WORK ORDER (4)', and 'RESULTS (1)'. A search bar in the top right contains the text 'WSRV-4961'. Below the navigation bar, a map displays a residential area with blue lines representing water service connections. A yellow callout bubble points to the map with the text 'Matching results will be displayed on the Results pane'. On the left side, a list of 'Water Service Connections (1)' is shown, with 'WSRV-4961' selected. On the right side, a detailed view of 'WSRV-4961' is displayed, showing various attributes such as OBJECTID, Facility Identifier, Account Number, Metered Service, Service Type, Install Date, Location, Description, Rotation, Location Identifier, CriticalCustomer, Enabled, Active Flag, Owned By, Managed By, Last Update Date, Last Editor, and Globalid. At the bottom right, a section for 'Forms (0)' indicates that there are no forms associated with this asset.

Trimble Unity Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (1)

WSRV-4961

Back

Find address or place

Water Service Connections (1)

WSRV-4961

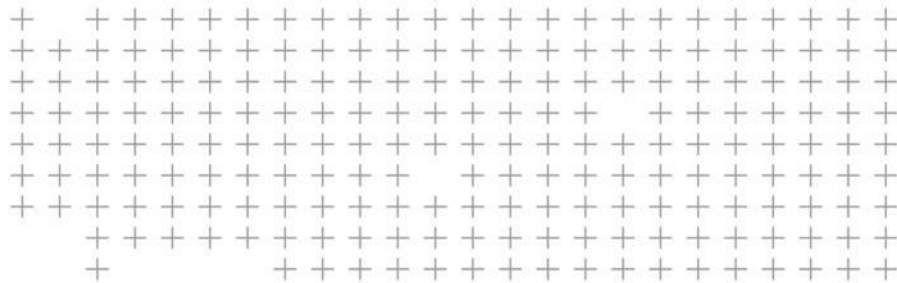
Matching results will be displayed on the Results pane

WSRV-4961  
Water Service Connections

OBJECTID: 4960  
Facility Identifier: WSRV-4961  
Account Number: 15277  
Metered Service: Yes  
Service Type: Domestic  
Install Date: 12/31/1989 4:00 PM  
Location: 15277  
Description:  
Rotation: 60.9231  
Location Identifier: 15277  
CriticalCustomer: False  
Enabled: True  
Active Flag: True  
Owned By: Private  
Managed By: Private  
Last Update Date: 5/6/2015 6:49 AM  
Last Editor: Esri  
Globalid: (5A8596AE-7FCF-4F2B-9404-63281996B631)

Forms (0)

This Water Service Connections has no forms



# Advanced Asset Search



# Advanced Asset Search

≡

Trimble Unity

Valve Inspector

DASHBOARD

WORK ORDER (4)

Advanced GIS Search Tools

All Priority ▾

Status (4) ▾

Assigned To : Rami Naber ▾

MORE FILTERS

Saved Filters : My Work Orders ▾

Sort By : lastUpdated ▾

Find address or place

az 06-01 1558

Valve Inspector • Assigned To Rami Naber

On Site • 2 Assets

1025 Forest View Ct Naperville DuPage County Illinois

iOS 06-04 2247

Valve Inspector • Assigned To Rami Naber

Opened • 1 Assets

Address not set

iOS 06-03 1655

Valve Inspector • Assigned To Rami Naber

Opened • 1 Assets

Address not set

Need inspection

Valve Inspector • Assigned To Rami Naber

Opened • 0 Assets

1329 Branchwood Cir Naperville Illinois

Powered by Esri

1. Click on Search and chose  
Advanced GIS Search Tools

# Advanced Asset Search

The screenshot displays the Trimble Unity Valve Inspector application. The interface includes a top navigation bar with the Trimble Unity logo, a dashboard/work order status, and a search bar. A left sidebar lists work orders with details like status, assigned personnel, and asset counts. The main area is a map showing a residential street layout with blue lines representing water infrastructure. A yellow callout bubble points to a search overlay window. This window has a 'Layer' tab selected, showing a list of asset types: Water Curb Stop Valves, Water Fittings, Water Mains, Water Lateral Lines, and Water Casings. A search bar is at the top of the overlay, and 'CANCEL' and 'SEARCH' buttons are at the bottom right.

Trimble Unity | Valve Inspector

DASHBOARD WORK ORDER (4)

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

Find address or place

2. Chose the Layer you want to search

Layer

Search...

Search Filters

Select

ADD SEARCH FILTER

Water Curb Stop Valves

Water Fittings

Water Mains

Water Lateral Lines

Water Casings

CANCEL SEARCH

Powered by Esri

# Advanced Asset Search

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (4)'. A search bar is located in the top right corner. Below the navigation bar, there are filter options: 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'MORE FILTERS'. A 'Saved Filters: My Work Orders' button is also present. The main area shows a map with a search overlay. The overlay has a 'Layer' dropdown set to 'Water Valves'. Under 'Search Filters', there is a dropdown for 'Valve Type' set to 'Gate', followed by 'is equal to' and another dropdown set to 'Gate'. Below this, there is an 'ADD SEARCH FILTER' button and a filter entry 'Diameter is equal to 8"'. At the bottom of the overlay are 'CANCEL' and 'SEARCH' buttons. A list of work orders is visible on the left side of the map.

4. Click on Add Search Filter to add the defined criteria  
Multiple searches added act like an AND operator i.e. result matches query1 AND query2

3. Enter Search Criteria

5. Click on the Search button to perform the search

# Advanced Asset Search

Trimble Unity Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (403)

Advanced GIS Search Applied

Back Create Work Order View Selected Items

Find address or place

6. Search Results

Water Valves (403)

- WSVAL-1711
- WSVAL-1712
- WSVAL-1714
- WSVAL-1744
- WSVAL-1754
- WSVAL-1778
- WSVAL-1784
- WSVAL-1787
- WSVAL-1788
- WSVAL-1789
- WSVAL-1821
- WSVAL-1823
- WSVAL-1835
- WSVAL-1836
- WSVAL-1839
- WSVAL-1840



# Advanced Asset Search

The screenshot displays the Trimble Unity Valve Inspector application. The top navigation bar includes a hamburger menu, the logo, and tabs for DASHBOARD, WORK ORDER (4), and RESULTS (403). A search bar at the top right shows 'Advanced GIS Search Applied' with a close button (X). On the left, a list of water valves is shown, all checked, with a search filter 'AZ' applied. The main area is a map of Naperville, Illinois, with numerous blue location pins representing water valves. A search overlay is centered on the map, featuring a 'Layer' dropdown set to 'Water Valves', 'Search Filters' with two 'Select' dropdowns, and an 'ADD SEARCH FILTER' section. Two filters are active: 'Diameter is equal to 8"' and 'Valve Type is equal to Gate'. The overlay includes 'CANCEL' and 'SEARCH' buttons. A yellow callout bubble points to the 'X' icon in the top right search bar, containing the text: 'Click here to change the criteria or on the X to clear the search'.

Trimble Unity Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (403)

Advanced GIS Search Applied X

Back Create Work Order View Selected Items

Water Valves (403)

WSVAL-1711

WSVAL-1712

WSVAL-1714

WSVAL-1744

WSVAL-1754

WSVAL-1778

WSVAL-1784

WSVAL-1787

WSVAL-1788

WSVAL-1789

WSVAL-1821

WSVAL-1823

WSVAL-1835

WSVAL-1836

WSVAL-1839

WSVAL-1840

Find address or place

Layer Water Valves

Search Filters

Select Select

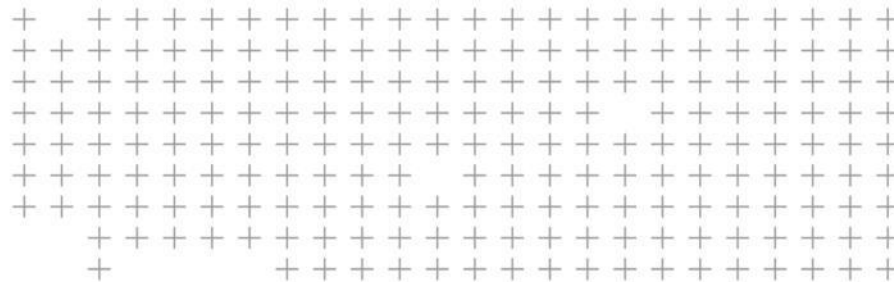
ADD SEARCH FILTER

Diameter is equal to 8"

Valve Type is equal to Gate


CANCEL SEARCH

Click here to change the criteria or on the X to clear the search




# Working with Selection or Search Results

# View Selection Results in Tabular View







 **Trimble Unity** | Change out

DASHBOARDWORK ORDER (5)RESULTS (25)

Search...



← Back



Water Service Connections (11)

<input type="checkbox"/>	OBJECTID	Facility Identifier	Account Number	Metered Service	Service Type	Install Date	Location	Address
<input type="checkbox"/>	346	WSRV-347	1365	Yes	Domestic	12/31/1989 4:00 PM	1365	
<input type="checkbox"/>	1261	WSRV-1262	4056	Yes	Domestic	12/31/1989 4:00 PM	4056	
<input type="checkbox"/>	1763	WSRV-1764	5564	Yes	Domestic	12/31/1989 4:00 PM	5564	321.0072
<input type="checkbox"/>	2223	WSRV-2224	6945	Yes	Domestic	12/31/1989 4:00 PM	6945	142.5823
<input type="checkbox"/>	2662	WSRV-2663	8328	Yes	Domestic	12/31/1989 4:00 PM	8328	142.5826
<input type="checkbox"/>	3119	WSRV-3120	9734	Yes	Domestic	12/31/1989 4:00 PM	9734	320.1634
<input type="checkbox"/>	3121	WSRV-3122	9736	Yes	Domestic	12/31/1989 4:00 PM	9736	322.5825
<input type="checkbox"/>	3994	WSRV-3995	12452	Yes	Domestic	12/31/1989 4:00 PM	12452	142.583
<input type="checkbox"/>	6197	WSRV-6198	19390	Yes	Domestic	12/31/1989 4:00 PM	19390	142.5831
<input type="checkbox"/>	7001	WSRV-7002	22121	Yes	Domestic	12/31/1989 4:00 PM	22121	319.3115
<input type="checkbox"/>	1764	WSRV-1765	5565	Yes	Domestic	12/31/1989 4:00 PM	5565	2.6041

Water Mains (2)

<input type="checkbox"/>	OBJECTID	Facility Identifier	Install Date	Material	Diameter	Water Type	Transmission System
--------------------------	----------	---------------------	--------------	----------	----------	------------	---------------------

+

Switch between List, Tabular and Split Views

# View Selection Results in Split View

≡

Trimble Unity

Change out

DASHBOARD

WORK ORDER (5)

RESULTS (25)

Search...

← Back

Find address or place

Q

+

-

Split View

Powered by Esri

Water Service Connections (11)

⌵

⌵

AZ

<input type="checkbox"/>	OBJECTID	Facility Identifier	Account Number	Metered Service	Service Type	Install Date	Location Description	Rotation
<input type="checkbox"/>	346	WSRV-347	1365	Yes	Domestic	12/31/1989 4:00 PM	1365	142.5822
<input type="checkbox"/>	1261	WSRV-1262	4056	Yes	Domestic	12/31/1989 4:00 PM	4056	136.5755
<input type="checkbox"/>	1763	WSRV-1764	5564	Yes	Domestic	12/31/1989 4:00 PM	5564	321.0072
<input type="checkbox"/>	2223	WSRV-2224	6945	Yes	Domestic	12/31/1989 4:00 PM	6945	142.5823
<input type="checkbox"/>	2662	WSRV-2663	8328	Yes	Domestic	12/31/1989 4:00 PM	8328	142.5826
<input type="checkbox"/>	3119	WSRV-3120	9734	Yes	Domestic	12/31/1989 4:00 PM	9734	320.1634

+



# Sort and Filter Selection Results

The screenshot displays the Trimble Unity web application interface. The top navigation bar includes the Trimble Unity logo, a 'Change out' button, and tabs for 'DASHBOARD', 'WORK ORDER (5)', and 'RESULTS (25)'. A search bar is located on the right. The left sidebar shows a tree view of data layers: 'Water Service Connections (11)', 'Water Mains (2)', and 'Water Lateral Lines (12)'. A yellow callout points to the 'Water Service Connections' layer, stating: 'Sort and Filter the list (within a layer type)'. The main content area shows a map with blue lines representing water service connections. A modal window titled 'Water Service Connections' is open, displaying a list of filters: 'OBJECTID', 'Facility Identifier', 'Account Number', 'Metered Service', 'Service Type', 'Install Date', and 'Location Description'. Each filter has a dropdown menu currently set to 'All'. A yellow callout points to the modal, stating: 'Multi-criteria filters can be applied'. At the bottom of the modal are 'RESET' and 'FILTER' buttons. The bottom of the screen shows 'Powered by Esri'.

Trimble Unity | Change out

DASHBOARD WORK ORDER (5) RESULTS (25)

Search...

Back

Find address or...

Water Service Connections (11) A-Z

WSRV-347

WSRV-1262

WSRV-2663

WSRV-3120

WSRV-3122

WSRV-3995

WSRV-6198

WSRV-7002

WSRV-1765

Water Mains (2) A-Z

Water Lateral Lines (12) A-Z

Water Service Connections

OBJECTID All

Facility Identifier All

Account Number All

Metered Service All

Service Type All

Install Date All

Location Description All

RESET FILTER

Sort and Filter the list (within a layer type)

Multi-criteria filters can be applied

Powered by Esri

# View Feature Details

≡

Trimble Unity

Change out

DASHBOARD

WORK ORDER (5)

RESULTS (25)

Search...

← Back

Water Service Connections (11)

Service Type = Domestic

WSRV-347

WSRV-1262

WSRV-1764

WSRV-2224

WSRV-2663

WSRV-3120

WSRV-3122

WSRV-3995

WSRV-6198

WSRV-7002

WSRV-1765

Water Mains (2)

Water Lateral Lines (12)

Find address or place

WSRV-347

Water Service Connections

OBJECTID: 346

Facility Identifier: WSRV-347

Account Number: 1365

Metered Service: Yes

Service Type: Domestic

Install Date: 12/31/1989 4:00 PM

Location: 1365

Description:

Rotation: 142.5822

Location Identifier: 1365

CriticalCustomer: False

Enabled: True

Active Flag: True

Owned By: Private

Managed By: Private

Last Update Date: 5/6/2015 6:49 AM

Last Editor: Esri

Globalid: (5FF5E1C1-604A-4CD9-95B4-ADC1156A7C0C)

Forms (0)

This Water Service Connections has no forms

Highlight Item

View Details

View Location on Map

# Perform Actions on Selected Results

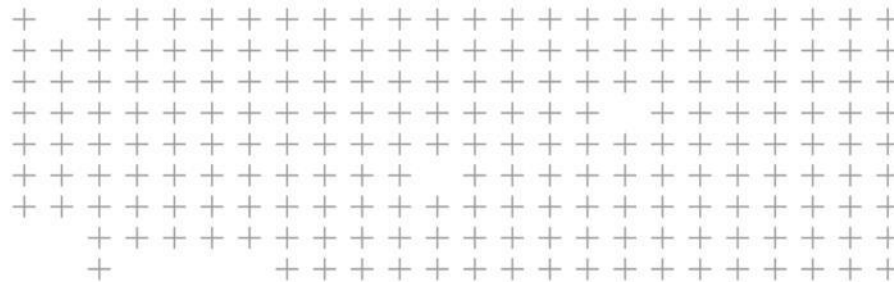
The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes a hamburger menu, the application name "Trimble Unity", the title "Valve Inspector", and tabs for "DASHBOARD", "WORK ORDER (4)", and "RESULTS (47)". A search bar is located on the right. Below the navigation bar, a toolbar contains buttons for "Back", "Create Work Order", and "View Selected Items", along with icons for map interaction. The left sidebar lists various asset categories with checkboxes and sort options (A-Z):

- ☒ Water Valves (4) [Sort: A-Z]
  - Hydrant Valve = False [Filter]
  - Diameter = 6" [Filter]
  - ☒ WSVAl-1944
  - ☒ WSVAl-2687
  - ☒ WSVAl-3189
  - ☒ WSVAl-3569
- ☐ > Water Service Connections (7) [Sort: A-Z]
- ☐ > Water Hydrants (2) [Sort: A-Z]
- ☐ > Water Mains (10) [Sort: A-Z]
- ☐ > Water Lateral Lines (24) [Sort: A-Z]

The main map area shows a street view with a blue polygon highlighting a specific region. Two yellow callout boxes provide instructions:

- Actions available for selected items**: Points to the top of the blue selection area on the map.
- Select one or more items**  
Make sure the checkbox is checked to indicate selection: Points to the checkbox for "WSVAl-3569" in the left sidebar.

The map includes street names such as "S BRANIFF ST", "S LOCUST ST", "E CHICAGO AVE", and "S SLEIGHT ST". A blue circle with a white plus sign is visible in the bottom right corner of the map area.



# Working with Lists and Filters

# App Details - Lists

The screenshot displays the Trimble Unity Pressure Monitor application. At the top, the navigation bar includes the Trimble Unity logo, the title 'Pressure Monitor', and a 'DASHBOARD' button. To the right of the dashboard button are three tabs: 'WORK ORDER (36)', 'MONITORING SITES (14)', and 'ALARMS (576)'. A yellow dashed box highlights these tabs, and a yellow callout bubble points to them with the text: 'An App can have one of more lists. This example shows three lists. Each list shows the total number of items present on the list based on the applied filters. Simply switch between lists by clicking on the list name.'

Below the navigation bar, the main interface is divided into three sections. On the left is a list of transient alarms, each with a status icon (a circle with a 'C'), a title, and a timestamp. The first item is 'HYD-1026.9314: Transient' with a timestamp of 'Jun 21, 2018 12:13:03 PM'. The middle section is a map view showing a residential area with a blue line representing a water main and several red crosshair markers indicating monitoring sites. On the right is a detailed view of the selected alarm, 'HYD-1026.9314: Transient'. This view includes fields for 'Type: Transient', 'Status: Active', 'Description: HYD-1026.9314: Transient', 'Alarm date/time: 6/21/2018 12:13 PM', and 'Intensity:'. Below these fields are buttons for 'CREATE WORK' and 'VIEW ON MAP'. At the bottom of the right panel is an 'ACKNOWLEDGE' button and a 'Notes' section with an 'Add Note' field and a message stating 'This Transient has no notes'. At the very bottom of the right panel is a 'Forms (0)' section with a message stating 'This Transient has no forms' and a blue circular button with a white plus sign.

**Trimble Unity** | Pressure Monitor

DASHBOARD

WORK ORDER (36) | MONITORING SITES (14) | **ALARMS (576)**

Search...

Status: Active | Type: (v) | All Priority | MORE FILTERS | Saved Filters: Pressure Alarms (v)

Sort By: lastUpdated (v)

Find address or place

**HYD-1026.9314: Transient**  
Jun 21, 2018 12:13:03 PM  
Active

**HYD-1026.9312: Transient**  
Jun 21, 2018 11:09:47 AM  
Active

**HYD-1026.9313: Transient**  
Jun 21, 2018 11:03:31 AM  
Active

**HYD-431.9311: Transient**  
Jun 21, 2018 9:48:38 AM  
Active

**HYD-1026.9307: Transient**  
Jun 21, 2018 9:24:04 AM  
Active

**HYD-526.9310: Transient**  
Jun 21, 2018 9:02:55 AM  
Active

**HYD-1026.9308: Transient**  
Jun 21, 2018 9:02:52 AM  
Active

**HYD-218.9309: Transient**  
Jun 21, 2018 9:02:51 AM  
Active

**HYD-741.9306: Transient**  
Jun 21, 2018 9:02:48 AM  
Active

**HYD-1026.9314: Transient**  
Transient

Type: Transient  
Status: Active  
Description: HYD-1026.9314: Transient  
Alarm date/time: 6/21/2018 12:13 PM  
Intensity:

CREATE WORK | VIEW ON MAP

**ACKNOWLEDGE**

**Notes**

Add Note

This Transient has no notes

**Forms (0)**

This Transient has no forms

# App Details – List Filters

The screenshot displays the Trimble Unity Pressure Monitor application. The top navigation bar includes 'DASHBOARD', 'WORK ORDER (36)', 'MONITORING SITES (14)', and 'ALARMS (576)'. A search bar is located on the right. Below the navigation bar, the 'Status: Active' filter is selected, and a 'MORE FILTERS' button is visible. A yellow callout points to this button with the text: 'View or change the applied default filters for the active list.'

The main content area is divided into a list of alarms on the left and a map on the right. The list shows several transient alarms, all with a status of 'Active' and a timestamp of 'Jun 21, 2018'. The map displays a residential area with streets and parks, with a blue line indicating a water main line and red crosses marking specific locations.

On the right side, a detailed view of a specific alarm is shown. The alarm is titled 'HYD-1026.9314: Transient' and has a status of 'Active'. The description is 'HYD-1026.9314: Transient' and the alarm date/time is '6/21/2018 12:13 PM'. The intensity is 'Transient'. Below the details, there are buttons for 'CREATE WORK' and 'VIEW ON MAP', and an 'ACKNOWLEDGE' button. The 'Notes' section shows 'This Transient has no notes'. The 'Forms' section shows 'This Transient has no forms'.

Alarm ID	Type	Status	Description	Alarm date/time	Intensity
HYD-1026.9314	Transient	Active	HYD-1026.9314: Transient	6/21/2018 12:13 PM	Transient
HYD-1026.9312	Transient	Active			
HYD-1026.9313	Transient	Active			
HYD-431.9311	Transient	Active			
HYD-1026.9307	Transient	Active			
HYD-526.9310	Transient	Active			
HYD-1026.9308	Transient	Active			
HYD-218.9309	Transient	Active			
HYD-741.9306	Transient	Active			



# App Details – Saved List Filters

The screenshot displays the Trimble Unity Pressure Monitor application interface. At the top, the navigation bar includes the Trimble Unity logo, the title 'Pressure Monitor', and tabs for 'DASHBOARD', 'WORK ORDER (36)', 'MONITORING SITES (14)', and 'ALARMS (576)'. A search bar is located on the right. Below the navigation bar, the 'Status: Active' and 'Type (5)' filters are shown, along with a 'MORE FILTERS' link. The main content area is divided into a left sidebar, a central map, and a right-hand details panel.

**Left Sidebar:** A list of active transient alarms, each with a circular icon, ID, name, and timestamp. The first item is highlighted in blue.

ID	Name	Status	Timestamp
HYD-1026.9314	Transient	Active	Jun 21, 2018 12:13:03 PM
HYD-1026.9312	Transient	Active	Jun 21, 2018 11:09:47 AM
HYD-1026.9313	Transient	Active	Jun 21, 2018 11:03:31 AM
HYD-431.9311	Transient	Active	Jun 21, 2018 9:48:38 AM
HYD-1026.9307	Transient	Active	Jun 21, 2018 9:24:04 AM
HYD-526.9310	Transient	Active	Jun 21, 2018 9:02:55 AM
HYD-1026.9308	Transient	Active	Jun 21, 2018 9:02:52 AM
HYD-218.9309	Transient	Active	Jun 21, 2018 9:02:51 AM
HYD-741.9306	Transient	Active	Jun 21, 2018 9:02:48 AM

**Central Map:** A map showing a residential area with streets like Springhill Greenway, Brookline Ct, and Barclay Dr. A blue line indicates a path or boundary, and a red crosshair marks a specific location. A yellow callout box points to the 'Saved Filters' menu.

**Right-Hand Details Panel:** A detailed view of the selected transient alarm (HYD-1026.9314: Transient). It includes fields for Type, Status, Description, Alarm date/time, and Intensity. Below these fields are buttons for 'CREATE WORK' and 'VIEW ON MAP'. A blue 'ACKNOWLEDGE' button is also present. The 'Notes' section shows 'This Transient has no notes'. The 'Forms' section shows 'This Transient has no forms'.

**Callout Box:** A yellow speech bubble with the text: 'View, Save and Manage user defined list of filters. Use 'Save currently applied filters' to add a filter to the saved list'.

**Saved Filters Menu:** A dropdown menu titled 'Saved Filters : Pressure Alarms' with the following options: 'Open Items', 'Pressure Alarms' (checked), 'Closed Items (30 Days)', 'Save currently applied filters', and 'Manage Saved Filters'.

# App Details –List Sorting

**Trimble Unity | Valve Inspector**

DASHBOARD WORK ORDER (4)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

- lastUpdated
- Priority
- External Id
- creationDate

**Change the default Sort order of the list**

**az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 2 Assets  
1025 Forest View Ct Naperville, IL

**iOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**iOS 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Naperville**



# App Details –Actions on Selection

2 Selected

Assign View On Map Export

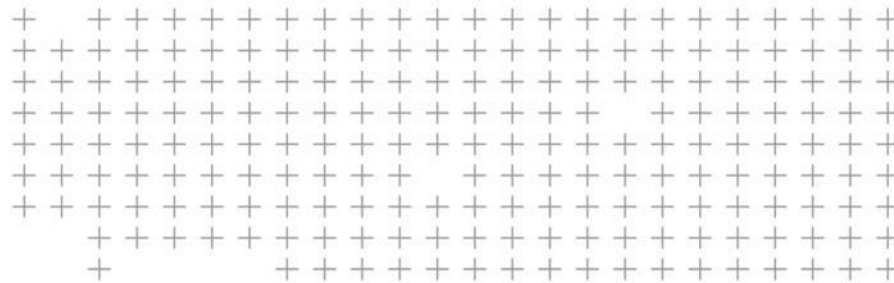
Sort By : lastUpdated Find address or place

- ☒ **Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois
- ☒ **Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois
- ☐ **Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

Various Actions can be performed on multi list selection

Century Farm Ln  
Erb Farm Ln  
Nicholas Ct  
Sigmund Rd  
707th

Powered by Esri



# Creating Asset Based Work Orders

# Select Asset(s) to Include on Work Order

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes a hamburger menu, the text "Trimble Unity | Valve Inspector", and tabs for "DASHBOARD", "WORK ORDER (4)", and "RESULTS (55)". A search bar is located on the right. Below the navigation bar, a blue header contains a "Back" button, a "Create Work Order" button, and a "View Selected Items" button. The left sidebar shows a list of assets under the "Water Valves (3)" category, with filters for "Diameter = 8\" and "Hydrant Valve = False". The assets listed are WSVAl-2803, WSVAl-4337, and WSVAl-4519, all of which are checked. Below this, there are expandable sections for "Water Service Connections (8)", "Water Hydrants (3)", "Water Mains (6)", and "Water Lateral Lines (35)". The main area is a map showing a street layout with a blue selection box highlighting a specific area. Three yellow callout boxes provide instructions: 1. Perform a map selection or asset search (refer to previous sections), 2. Select the assets from the results you want to include on the work order, and 3. Click on Create Work Order action.

1. Perform a map selection or asset search (refer to previous sections)

2. Select the assets from the results you want to include on the work order

3. Click on Create Work Order action

# Create Asset Based Work Order

Trimble Unity | Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (55)

Search...

Back

Water Valves (3)

Diameter = 8" Hydrant Valve = False

WSVAL-2803

WSVAL-4337

WSVAL-4519

Water Service Connections (8)

Water Hydrants (3)

Water Mains (6)

Water Lateral Lines (35)

**New Work Order**

General

Address

Assets

Work Order  
VI\_Prescott100

Organizational Unit  
North District

Type  
Valve Inspector

Status  
Opened

Reason  
Condition Assessment

Priority  
☐ Emergency

RESET CANCEL CREATE

Fill out required fields on the New Work Order popup. Note that the address and the list of assets will automatically be populated.

# Create Asset Based Work Order

**Trimble Unity** | Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (55)

Search...

Back

Water Valves (3)

Diameter = 8" Hydrant Valve = False

WSVAL-2803

WSVAL-4337

WSVAL-4519

Water Service Connections (8)

Water Hydrants (3)

Water Mains (6)

Water Lateral Lines (35)

**New Work Order**

General

Address

Assets

Address Line b

City  
Naperville

County  
DuPage County

State  
Illinois

Postcode

Geometry  
EPSG:3857;POINT (-9815454.501162535 5128502.533548465)

SELECT FROM MAP USE CURRENT LOCATION

RESET CANCEL CREATE

Default Address or location information can be updated



# Create Asset Based Work Order

**Trimble Unity** | Valve Inspector

DASHBOARD WORK ORDER (4) RESULTS (55)

Search...

Back

Water Valves (3)

Diameter = 8" Hydrant Valve = False

WSVAL-2803

WSVAL-4337

WSVAL-4519

Water Service Connections (8)

Water Hydrants (3)

Water Mains (6)

Water Lateral Lines (35)

**New Work Order**

General Address Assets

SELECT FROM MAP USE CURRENT LOCATION

Assets

Assets	Display Name	Layer Name
<input type="checkbox"/>		
<input type="checkbox"/>	WSVAL-2803	Water Valves
<input type="checkbox"/>	WSVAL-4337	Water Valves
<input type="checkbox"/>	WSVAL-4519	Water Valves

+ ADD

RESET CANCEL CREATE

Assets can be removed or new assets can be added to the list before the work order is created

# Create Asset Based Work Order

The screenshot displays the Trimble Unity Valve Inspector application. The main interface shows a sidebar with asset categories like Water Valves (3), Water Service Connections (8), Water Hydrants (3), Water Mains (6), and Water Lateral Lines (35). The top navigation bar includes 'DASHBOARD', 'WORK ORDER (4)', and 'RESULTS (55)'. A 'New Work Order' modal is open, featuring a 'General' tab and a table of assets. A yellow callout bubble highlights the 'CREATE' button.

**New Work Order**

SELECT FROM MAP | USE CURRENT LOCATION

**Assets**

	Display Name	Layer Name
<input type="checkbox"/>	WSVAL-2803	Water Valves
<input type="checkbox"/>	WSVAL-4337	Water Valves
<input type="checkbox"/>	WSVAL-4519	Water Valves

+ ADD

CANCEL **CREATE**

Click on the Create button to create the new work order

# View Created Work Order

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (5)'. A search bar is located on the right. Below the navigation bar, there are filters for 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'Saved Filters: My Work Orders'. The main content area is divided into three sections: a list of work orders on the left, a map in the center, and a details panel on the right.

**Work Order List:**

- VL\_Prescott100** (M)  
Valve Inspector • Assigned To Rami Naber  
Opened • 3 Assets  
Naperville DuPage County Illinois
- az 06-01 1558** (E)  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- ios 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set
- ios 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- Need inspection** (L)  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Map:** A map showing the location of the work order. A yellow callout points to the top of the list, stating: "New Work Order will show on top of the list". Another yellow callout points to a location on the map, stating: "New Work Order location shown on the map".

**Details Panel:** The details panel for 'VL\_Prescott100' is shown on the right. It includes a 'General' tab and a 'Valve Inspector' title. The status is 'Opened' on 'Jul 09, 2018' with 'Medium' priority. The reason is 'Condition Assessment' and it is assigned to 'Rami Naber'. Below the details are icons for 'EDIT', 'ASSIGN', 'DELETE', 'VIEW ON MAP', and 'EXPORT'. A yellow callout points to the details panel, stating: "New Work Order Details shown on the right side".

**Address:** The address section is titled 'Address' and includes fields for 'Address Line 1' through 'Address Line 6'. The location is 'Naperville, DuPage County, Illinois'. A yellow callout points to the address section, stating: "New Work Order Details shown on the right side".

# Add Attachments on Work Order

The screenshot displays the Trimble Unity web application interface. At the top, the navigation bar includes the Trimble Unity logo, the user name 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (5)'. A search bar is located on the right. Below the navigation bar, a sidebar on the left lists several work orders, including 'VI\_Prescott100' and 'az 06-01 1558'. The main area shows a map with a search bar and a list of work orders. A file attachment dialog is open in the center, showing a list of files from the 'Unity Demo' folder. A yellow callout box points to the '+' button in the 'Attachments (0)' section of the work order details, with the text '1. To add File attachments to the work order, click on the + button'. Another yellow callout box points to the 'Valve Operating Instructions.pdf' file in the dialog, with the text '2. Select the file you want to attach'. The work order details on the right show 'VI\_Prescott100' with 'Water Valves - Pending' status and sections for 'Forms (0)', 'Attachments (0)', and 'Audit (4)'.

Trimble Unity | Valve Inspector

DASHBOARD WORK ORDER (5)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

Find address or place

VI\_Prescott100  
Valve Inspector • Assigned To Rami Naber  
Opened • 3 Assets  
Naperville DuPage County Illinois

az 06-01 1558  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

ios 06-04 2247  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

ios 06-03 1655  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

Need inspection  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

Open

Unity Demo • Attachments

Organize New folder

Manhole Safety Guide.pdf PRV\_MONITORING\_WITH\_RU\_32.pdf Simple\_Manhole\_Cover\_Leak\_Test.mp4 Twitter Leak.JPG Valve Operating Instructions.pdf

File name: Valve Operating Instructions.pdf All Files Open Cancel

1. To add File attachments to the work order, click on the + button

2. Select the file you want to attach

VI\_Prescott100  
Valve Inspector  
Water Valves - Pending

Forms (0)  
This Valve Inspector has no forms

Attachments (0)  
This Valve Inspector has no attachments

Audit (4)

# Add Attachments on Work Order

The screenshot displays the Trimble Unity web interface. The top navigation bar includes the Trimble Unity logo, a user profile icon, and tabs for DASHBOARD and WORK ORDER (5). Below the navigation bar, there are filters for Priority, Status (4), and Assigned To (Rami Naber). A list of work orders is shown on the left, including VI\_Prescott100, az 06-01 1558, IOS 06-04 2247, IOS 06-03 1655, and Need inspection. The main area shows a map with valve locations marked by red and yellow icons. A modal window titled "Add Attachment" is open, featuring a "BROWSE" button, a text input for "Valve Operating Instruc...", a "Title" field with the value "Valve Operating Instructions", and a "Description" field. The modal has "CANCEL" and "ADD" buttons. A yellow callout bubble points to the "ADD" button with the text: "Update the Title and Description of the file if required, then click on the Add button. This will add the file attachment on the work order and make it available on the Unity mobile app." The right sidebar shows details for VI\_Prescott100, including a map view, a list of attachments (0), and an audit log (4).

Trimble Unity | Valve Inspector

DASHBOARD WORK ORDER (5)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

VI\_Prescott100  
Valve Inspector • Assigned To Rami Naber  
Opened • 3 Assets  
Naperville DuPage County Illinois

az 06-01 1558  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

IOS 06-04 2247  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

IOS 06-03 1655  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

Need inspection  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

Find address or place

McDowell Grove

Widgeon Ave

West Branch River

Heritage Woods

700 ft

Valve Operating Instruc... X

Title  
Valve Operating Instructions

Description

CANCEL ADD

Update the Title and Description of the file if required, then click on the Add button. This will add the file attachment on the work order and make it available on the Unity mobile app.

VI\_Prescott100  
Valve Inspector  
Water Valves • Pending

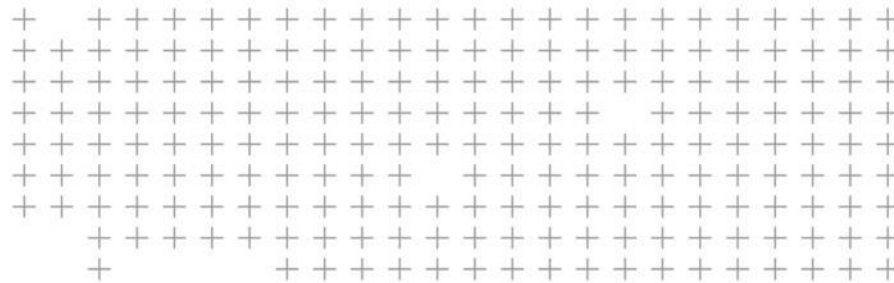
This Valve Inspector has no forms

Attachments (0)  
This Valve Inspector has no attachments

Audit (4)

+





# Creating Location Based Work Orders

# Create Location Based Work Order

The screenshot displays the Trimble Unity Leak Reporting interface. The top navigation bar includes the Trimble Unity logo, the title "Leak Reporting", and tabs for "DASHBOARD" and "WORK ORDER (3)". A search bar is located on the right. Below the navigation bar, there are filter options: "All Priority", "Status (5)", "Assigned To: Rami Naber", and "MORE FILTERS". A blue button labeled "Saved Filters: My Work Orders" is also present. The main area is a map showing a residential neighborhood with streets like CENTURY FARM LN, ERB FARM LN, and SIGMUND RD. The map is populated with numerous blue location pins and red crosshair markers. On the left side, there is a list of work orders, each preceded by a red circle with a white 'H' icon:

- Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois
- Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois
- Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

At the bottom right of the map, a yellow callout box contains the following text:

Use the address search or zoom to the location on the map where you want to create the work order. Then click on the + button

A blue circular button with a white "+" symbol is located at the bottom right corner of the map area.

# Create Location Based Work Order

The screenshot displays the Trimble Unity interface for Leak Reporting. The main header shows 'Trimble Unity' and 'Leak Reporting'. The top navigation bar includes 'DASHBOARD' and 'WORK ORDER (3)'. A search bar is located in the top right corner. The left sidebar lists several work orders, including 'Laura Ct Leak', 'Bigfoot&BurningTree', and 'Leak @ BurningTree'. The main content area shows a 'New Work Order' popup form. The form is titled 'General' and contains the following fields:

- Work Order: CenturyFarmLeak
- Organizational Unit: North District
- Type: Leak Reporting
- Status: Opened
- Reason: Accidental Damage

A yellow callout bubble points to the form with the text: 'Fill out required fields on the New Work Order popup.' The background shows a map of Century Farm Ln with various markers.

# Create Location Based Work Order

**Trimble Unity** | Leak Reporting

DASHBOARD | WORK ORDER (3)

All Priority | Status (5) | Assigned To: Rami Naber | MORE FILTERS | Saved Filters: My Work Orders

Sort By:

**New Work Order**

**General**

**Address**

**Assets**

Address Line 6

City

County

State

Postcode

Geometry

☐ SELECT FROM MAP ☐ USE CURRENT LOCATION

> RESET CANCEL **CREATE**

**Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois

**Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage Co

**Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage Co

# Create Location Based Work Order

Select Location from Map

The screenshot displays a web-based map application. On the left, a sidebar lists three work order entries, each with a red 'H' icon:

- Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois
- Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois
- Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

The main map area shows a residential neighborhood with streets labeled CENTURY FARM LN, ERB FARM LN, and NICHOLAS CT. A yellow callout bubble points to a specific location on the map with the text: "Select location on the map where you want to create the work order". The map includes various icons representing assets and features. A search bar at the top left of the map area contains the text "Find address or place:". A zoom control with a plus sign is visible in the bottom right corner.



# Create Location Based Work Order

**Trimble Unity** | Leak Reporting

DASHBOARD WORK ORDER (3)

Search...

All Priority Status (5) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By

**New Work Order**

**General**

Address Line 6

City  
Naperville

County  
DuPage County

State  
Illinois

Postcode  
60563

Geometry  
EPSG:3857:POINT (-9814534.813676387 5130502.789382597) X

SELECT FROM MAP USE CURRENT LOCATION

RESET CANCEL CREATE

Address details and coordinates will automatically be populated

**Work Order List:**

- Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois
- Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage Co
- Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage Co

# Create Location Based Work Order

The screenshot displays the Trimble Unity Leak Reporting interface. The main header shows 'Trimble Unity | Leak Reporting' and 'WORK ORDER (3)'. The left sidebar lists three work orders: 'Laura Ct Leak', 'Bigfoot&BurningTree', and 'Leak @ BurningTree'. The 'New Work Order' modal is open, showing a form with the following fields:

- General
- Address Line 6
- City: Naperville
- County: DuPage County
- State: Illinois
- Postcode: 60563
- Geometry: EPSG:3857:POINT (-9814534.813676387 5130502.789382597)

At the bottom of the form, there are two options: 'SELECT FROM MAP' and 'USE CURRENT LOCATION'. The modal also includes a 'RESET' button on the bottom left, a 'CANCEL' button, and a 'CREATE' button on the bottom right. A yellow callout bubble points to the 'CREATE' button with the text: 'Click on the Create button to create the new work order'.

# View Created Work Order

The screenshot displays the Trimble Unity Leak Reporting interface. The top navigation bar includes the Trimble Unity logo, the title 'Leak Reporting', and tabs for 'DASHBOARD' and 'WORK ORDER (4)'. A search bar is located on the right. Below the navigation bar, there are filters for 'All Priority', 'Status (5)', 'Assigned To: Rami Naber', and 'MORE FILTERS'. A 'Saved Filters: My Work Orders' button is also present. The main area is divided into three sections: a list of work orders on the left, a map in the center, and a detailed view of the selected work order on the right.

**Work Order List:**

- CenturyFarmLeak**  
Leak Reporting • Assigned To Rami Naber  
Opened • 0 Assets  
895 Century Farm Ln Naperville DuPage County Illinois
- Laura Ct Leak**  
Leak Reporting • Assigned To Rami Naber  
Investigated • 12 Assets  
467 Laura Ct Naperville Illinois
- Bigfoot&BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois
- Leak @ BurningTree**  
Leak Reporting • Assigned To Rami Naber  
Completed • 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

**Map:** A map showing the location of the new work order (CenturyFarmLeak) at 895 Century Farm Ln. The map includes a search bar and a 'Find address or place' button. A yellow callout points to the new work order location on the map.

**Work Order Details (CenturyFarmLeak):**

- Status: Opened
- Date: Jul 09, 2018
- Priority:
- Reason: Accidental Damage
- Assigned to: Rami Naber

**Address:**

- Address Line 1: 895 Century Farm Ln
- Address Line 2:
- Address Line 3:
- Address Line 4:
- Address Line 5:
- Address Line 6:
- City: Naperville
- County: DuPage County
- State: Illinois
- Postcode: 60563

**Actions:** EDIT, ASSIGN, DELETE, VIEW ON MAP, EXPORT

**Buttons:** ON SITE, +

# Add Attachments on Work Order

The screenshot displays the Trimble Unity web application interface. At the top, the navigation bar includes the Trimble Unity logo, the current page 'Leak Reporting', and tabs for 'DASHBOARD' and 'WORK ORDER (4)'. A search bar is located on the right. Below the navigation bar, there are filters for 'All Priority', 'Status (5)', and 'Assigned To: Rami Naber'. A 'Saved Filters: My Work Orders' button is also present. The main content area shows a list of work orders on the left and a detailed view of the 'CenturyFarmLeak' work order on the right. The work order details include sections for 'Notes', 'Forms (0)', and 'Attachments (0)'. A file explorer window is open in the center, showing the 'Unity Demo' directory with various files. A yellow callout points to the 'Reported Leak.JPG' file, indicating it should be selected. Another yellow callout points to the '+' button in the 'Attachments (0)' section, indicating it should be clicked to add the file.

**Trimble Unity** | Leak Reporting

DASHBOARD WORK ORDER (4)

Search...

All Priority Status (5) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

Find address or place

CenturyFarmLeak  
Leak Reporting - Assigned To Rami Naber  
Opened - 0 Assets  
895 Century Farm Ln Naperville DuPage County Illinois

Laura Ct Leak  
Leak Reporting - Assigned To Rami Naber  
Investigated - 12 Assets  
467 Laura Ct Naperville Illinois

Bigfoot&BurningTree  
Leak Reporting - Assigned To Rami Naber  
Completed - 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois

Leak @ BurningTree  
Leak Reporting - Assigned To Rami Naber  
Completed - 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

Open

Unity Demo - Attachments

Organize New folder

Manhole Safety Guide.pdf

PRV\_MONITORING\_WITH\_RU\_32.pdf

Reported Leak.JPG

Simple Manhole Cover Leak Test.mp4

Valve Operating Instructions.pdf

2. Select the file you want to attach

CenturyFarmLeak  
Leak Reporting

Notes

Add Note

This Leak Reporting has no notes

Forms (0)

This Leak Reporting has no forms

Attachments (0)

This Leak Reporting has no attachments

1. To add File attachments to the work order, click on the + button

# Add Attachments to Work Order

The screenshot displays the Trimble Unity Leak Reporting interface. On the left, a sidebar lists several work orders: 'CenturyFarmLeak', 'Laura Ct Leak', 'Bigfoot&BurningTree', and 'Leak @ BurningTree'. The main area shows a map with various markers and a search bar. A modal titled 'Add Attachment' is open in the center, allowing users to browse files, enter a title, and add a description. A yellow callout bubble points to the 'Add' button in the modal, providing instructions on how to update the file's title and description.

**Trimble Unity** | Leak Reporting

DASHBOARD WORK ORDER (4)

All Priority Status (5) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated ↓

**CenturyFarmLeak**  
Leak Reporting - Assigned To Rami Naber  
Opened - 0 Assets  
895 Century Farm Ln Naperville DuPage County Illinois

**Laura Ct Leak**  
Leak Reporting - Assigned To Rami Naber  
Investigated - 12 Assets  
467 Laura Ct Naperville Illinois

**Bigfoot&BurningTree**  
Leak Reporting - Assigned To Rami Naber  
Completed - 0 Assets  
737 Burning Tree Ln Naperville DuPage County Illinois

**Leak @ BurningTree**  
Leak Reporting - Assigned To Rami Naber  
Completed - 0 Assets  
529 Burning Tree Ln Naperville DuPage County Illinois

Find address or place

**Add Attachment**

BROWSE

Reported Leak .JPG

Title  
Reported Leak

Description

CANCEL ADD

**CenturyFarmLeak**  
Leak Reporting

This Leak Reporting has no forms

Attachments (0)  
This Leak Reporting has no attachments

Audit (1)

+



# Assign One or More WO's

1 Selected

Edit Assign Delete View On Map

Sort By: lastUpdated ↓ Find address or place

☒ TW-VI-001  
Valve Inspector \* (not assigned)  
Opened \* 1 Assets  
55862 N. Rd Naperville DuPage County

☐ az 06-01 1558  
Valve Inspector \* Assigned To Rami Naber  
On Site \* 14 Assets  
1025 Forest View Ct Naperville DuPage County

☐ VI\_Prescott100  
Valve Inspector \* Assigned To Rami Naber  
Completed \* 3 Assets  
Naperville DuPage County Illinois

☐ iOS 06-04 2247  
Valve Inspector \* Assigned To Rami Naber  
Opened \* 4 Assets  
Address not set

☐ new 123  
Valve Inspector \* Assigned To domenic daniel  
Opened \* 2 Assets  
Address not set

Batch - dispatch

Rami Naber

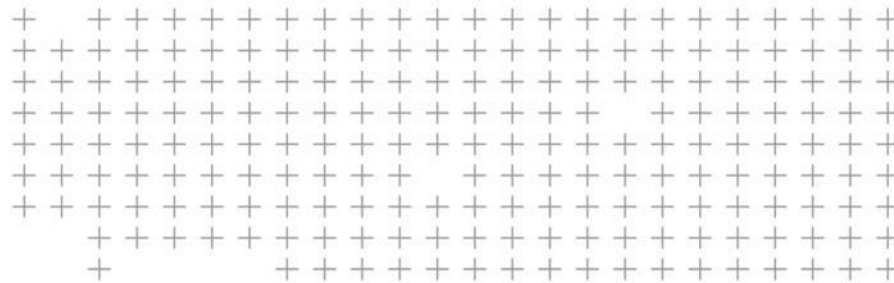
CANCEL ASSIGN

You can assign one or more WO's by selecting the WO's on the List area, and then selecting Assign

Select the crew to assign the WO's, and select ASSIGN.  
You can also assign a single WO via the WO details

State: Opened  
Date: 13 Jul 2018  
Priority: Medium  
Reason: Preventative Maintenance  
Assigned to:

EDIT ASSIGN DELETE VIEW ON MAP EXPORT



**View Work Order Details**

# View Work Order Details

**Trimble Unity** | Valve Inspector

DASHBOARD WORK ORDER (5)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated ↓

**VL\_Prescott100**  
Valve Inspector  
Completed • 3 Assets  
Naperville DuPage County Illinois

**az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

**iOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

**iOS 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

Find address or place

**Work Order Summary**

**Available Actions based on user role**

**Available Workflow Actions**  
Workflow actions can change the status of the WO, and on the mobile device can trigger data collection forms. Not all actions are available on Unity Web – some are just available on the mobile

**VL\_Prescott100**  
Valve Inspector

Status: Completed  
Date: Jul 09, 2018  
Priority: Medium  
Reason: Condition Assessment  
Assigned to: Rami Naber

EDIT ASSIGN DELETE VIEW ON MAP EXPORT

**VALIDATE**

**Address**

Address Line 1:  
Address Line 2:  
Address Line 3:  
Address Line 4:  
Address Line 5:  
Address Line 6:  
City:  
County:  
State:  
Postcode:

Naperville  
DuPage County  
Illinois

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



List of Assets associated to the Work Order. Color coded by Status. Clicking on the Locate button will highlight the assets on the map. Clicking on the asset will show the asset details and any forms associated to the asset

#### Work Order Notes

**Forms collected for the work order**  
For example previous inspections carried out on the asset

✶

Valve Inspector

A2

**WSVAL-2803**  
Water Valves • Inspected

**F** WSVAl-4337  
Water Valves • Failed

**WSVAL-4519**  
Water Valves • Inspected

## Notes

Please inspect attached valves

A7

100009499  
Valve inspection

100009498  
Valve Inspection

100009497  
Valve Inspection



# View Work Order Details

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, a search bar, and tabs for DASHBOARD and WORK ORDER (5). Below the navigation bar, there are filters for All Priority, Status (4), and Assigned To: Rami Naber. A 'Saved Filters: My Work Orders' button is also present. The main content area is divided into three sections: a list of work orders on the left, a map in the center, and a detailed view of the selected work order on the right.

**Work Order List:**

- VI\_Prescott100** (Orange icon)  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois
- az 06-01 1558** (Red icon)  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- IOS 06-04 2247** (Grey icon)  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set
- IOS 06-03 1655** (Grey icon)  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- Need inspection** (Green icon)  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Map:** A map showing the location of the work order. A yellow callout bubble points to the map with the text: "Work Order File Attachments. This includes photos and videos attached from the Unity mobile apps, or if the work order is configured to auto generate PDF reports upon completion. The reports will be listed in this sections. Clicking on the file will display or download the attachment."

**Work Order Details (VI\_Prescott100):**

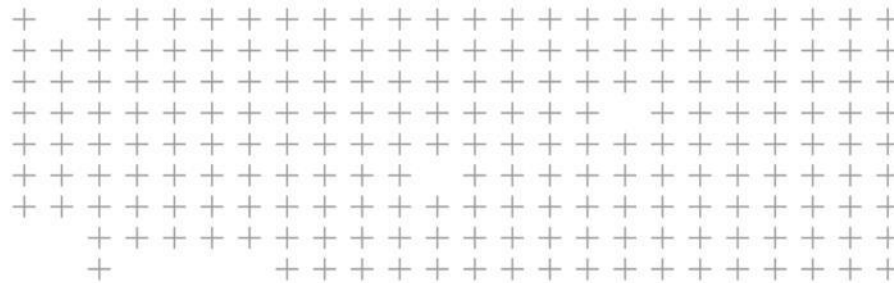
- General**
- Address**
- Assets**
- Forms**
- Attachments**
- Audit**

**Forms (3):**

- 100009499 Valve Inspection
- 100009498 Valve Inspection
- 100009497 Valve Inspection

**Attachments (1):**

- Valve Operating Instr... pdf- 1 mb



# View Form Details



# View Form Details

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title "Valve Inspector", and tabs for "DASHBOARD" and "WORK ORDER (5)". A search bar is located on the right. Below the navigation bar, there are filter options: "All Priority", "Status (4)", "Assigned To: Rami Naber", and "Saved Filters: My Work Orders".

The main content area is divided into three sections:

- Left Panel (List of Work Orders):** Displays a list of work orders with their status and details.
  - VI\_Prescott100:** Valve Inspector • Assigned To Rami Naber, Completed • 3 Assets, Naperville DuPage County Illinois.
  - az 06-01 1558:** Valve Inspector • Assigned To Rami Naber, On Site • 13 Assets, 1025 Forest View Ct Naperville DuPage County Illinois.
  - iOS 06-04 2247:** Valve Inspector • Assigned To Rami Naber, Opened • 4 Assets, Address not set.
  - iOS 06-03 1655:** Valve Inspector • Assigned To Rami Naber, Opened • 1 Assets, Address not set.
  - Need inspection:** Valve Inspector • Assigned To Rami Naber, Opened • 0 Assets, 1329 Branchwood Cir Naperville Illinois.
- Center Panel (Map):** A map showing the location of the work order. A yellow callout bubble points to the "Forms" icon in the right panel, stating: "Click on the Forms icon to quickly access the forms on WO".
- Right Panel (Details):** Displays the details for the selected work order, VI\_Prescott100.
  - General:** Valve Inspector
  - Address:** 100009499, Valve Inspection
  - Assets:** 100009498, Valve Inspection
  - Forms:** 100009497, Valve Inspection
  - Attachments:** 100009497, Valve Inspection
  - Audit:** 100009497, Valve Inspection

A yellow callout bubble points to the "Forms" icon in the right panel, stating: "Click on any of the forms to show the form details".

# View Form Details

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title "Valve Inspector", and tabs for "DASHBOARD" and "WORK ORDER (5)". A search bar is located on the right. Below the navigation bar, there are filters for "All Priority", "Status (4)", and "Assigned To: Rami Naber". A "Saved Filters: My Work Orders" button is also present. The main area is divided into a left sidebar, a central map, and a right-hand details panel.

**Left Sidebar:** A list of work orders is shown, each with a status icon (M, E, -, -) and details:

- VI\_Prescott100** (M): Valve Inspector • Assigned To Rami Naber, Completed • 3 Assets, Naperville DuPage County Illinois
- az 06-01 1558** (E): Valve Inspector • Assigned To Rami Naber, On Site • 13 Assets, 1025 Forest View Ct Naperville DuPage County Illinois
- iOS 06-04 2247** (-): Valve Inspector • Assigned To Rami Naber, Opened • 4 Assets, Address not set
- iOS 06-03 1655** (-): Valve Inspector • Assigned To Rami Naber, Opened • 1 Assets, Address not set
- Need inspection** (L): Valve Inspector • Assigned To Rami Naber, Opened • 0 Assets, 1329 Branchwood Cir Naperville Illinois

**Central Map:** A map view showing a street layout with a blue circle highlighting a specific location. A callout points to this circle with the text: "Highlight on map form location".

**Right-Hand Details Panel:** This panel shows the details for the selected work order, "100009497 Valve Inspection". It includes a "BACK" button, a "VIEW ON MAP" button, and "EDIT" and "DELETE" icons. The panel is divided into sections: "General Information", "Valve Details", "Tag", "Leaking", "Condition", "Operation", "Valve Support Structure", "Summary", and "Attachments".

**General Information Section:**

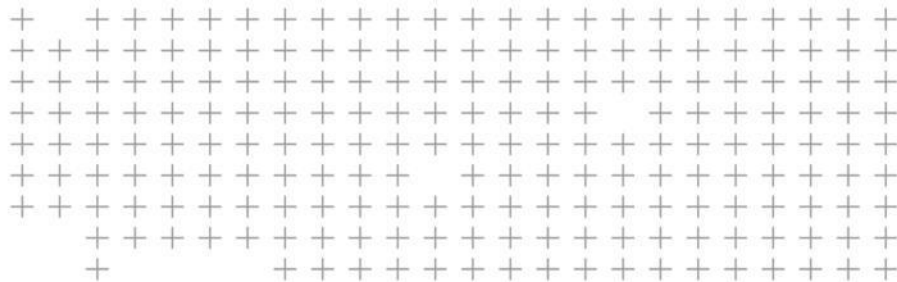
- Geo Location: 4326.POINT (-88.17383332799997 41.783014987)
- Inspection Date: 7/9/2018 5:09 PM
- User: Rami Naber
- Work Order No: VI\_Prescott100

**Valve Details Section:**

- District Gate Section:
- Valve No: WSVAl-4519
- Valve Size: 8"
- Valve Type: Gate
- Valve Make:

**Callouts:**

- "Back will navigate back to the work order details" points to the "BACK" button.
- "Pages/Sections configured on the form" points to the list of sections on the right.
- "Photo and Video Attachments added through the Unity mobile app" points to the "Attachments" section.
- "Navigate through all forms collected on the work order" points to the "Go to: 1 of 3" navigation at the bottom.



# Edit Form Details

# Editing Form Details

The screenshot displays the Trimble Unity Valve Inspector application interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (5)'. A search bar is located on the right. Below the navigation bar, there are filter options: 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'Saved Filters: My Work Orders'. The main area is divided into three sections: a left sidebar with a list of work orders, a central map, and a right sidebar with detailed information for the selected work order.

**Work Order List (Left Sidebar):**

- VI\_Prescott100** (M)  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois
- az 06-01 1558** (E)  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- iOS 06-04 2247** (-)  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set
- iOS 06-03 1655** (-)  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- Need inspection** (L)  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Map (Center):** A map showing the location of the selected work order. A yellow callout box points to the 'EDIT' button in the right sidebar, stating: 'Click on the Edit button. Note: Edit option is available on forms for Completed work orders only. Forms cannot be edited if the work order is still in progress and assigned to field users'.

**Work Order Details (Right Sidebar):**

**General Information**

100009497  
Valve Inspection

VIEW ON MAP EDIT DELETE

**General Information**

Geo Location:  
4326.POINT (-88.17383332799997 41.783014987)

Inspection Date:  
7/9/2018 5:09 PM

User:  
Rami Naber

Work Order No:  
VI\_Prescott100

**Valve Details**

District Gate Section:

Valve No:  
WSVAL-4519

Valve Size:  
8"

Valve Type:  
Gate

Valve Make:

Go to: 1 1 of 3 |< < > >|

# Editing Form Details

**Trimble Unity** | Valve Inspector

DASHBOARD | WORK ORDER (5)

All Priority ▼ Status (4) ▼ Assigned To: Rami Naber ▼ MORE FILTERS | Saved Filters: My Work Orders ▼

Sort By

**VL\_Prescott100**  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois

**az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage Co

**iOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

**iOS 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Edit Form 100009497**

General Information

Valve Details

Tag

Leaking

Condition

Operation

Valve Support Structure

Summary

Attachments

Coating Needed Yes/No

☒ No

☐ Yes

Bolt Condition

☒ Good

☐ Loose

☐ Missing

☐ Rusted

Is There A Valve Indicator

☐ No

☒ Yes

Is It Operable

☐ No

☐ Unknown

☒ Yes

CANCEL UPDATE

197

on

EDIT DELETE

Information

-88.17383332799997 41.783014987)

te:

9 PM

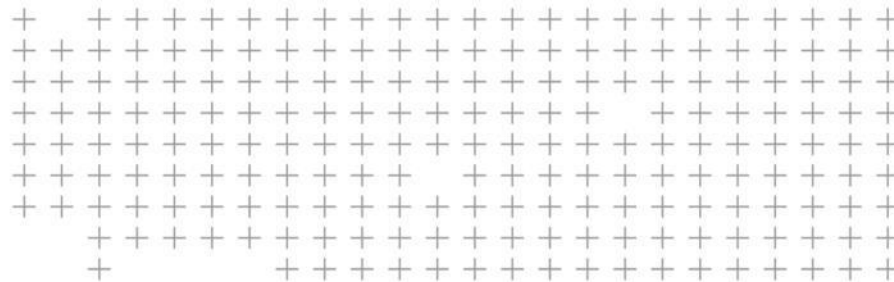
Go to: 1 1 of 3 |< < > >|

Valve Make:

Prepared by: [User]

+

Edit the answers on the form, and then click on the Update button. Note that read only questions or geometry details cannot be edited.



# Exporting Forms



# Export Forms for a Single Work Order

The screenshot displays the Trimble Unity Valve Inspector interface. The top navigation bar includes the Trimble Unity logo, the title 'Valve Inspector', and tabs for 'DASHBOARD' and 'WORK ORDER (5)'. A search bar is located on the right. Below the navigation bar, there are filters for 'All Priority', 'Status (4)', 'Assigned To: Rami Naber', and 'MORE FILTERS'. A 'Saved Filters: My Work Orders' button is also present.

The left sidebar shows a list of work orders:

- VL\_Prescott100** (M): Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois
- az 06-01 1558** (E): Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- iOS 06-04 2247**: Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set
- iOS 06-03 1655**: Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- Need inspection** (L): Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

The center map shows a residential area with a river and several marked locations. The right panel displays the details for the selected work order, **VL\_Prescott100**:

**VL\_Prescott100**  
Valve Inspector

Status: Completed  
Date: Jul 09, 2018  
Priority: Medium  
Reason: Condition Assessment  
Assigned to: Rami Naber

Buttons: EDIT, ASSIGN, DELETE, VIEW ON, EXPORT

**Address**

Address Line 1:  
Address Line 2:  
Address Line 3:  
Address Line 4:  
Address Line 5:  
Address Line 6:  
City: Naperville  
County: DuPage County  
State: Illinois  
Postcode:

A yellow callout bubble points to the **EXPORT** button with the text: "From the work order details, click on the Export button".

# Export Forms for Multiple Work Order

5 Selected

Assign View On Map Export

Sort By Last Updated ↓ Find address or place

- ☒ **VL\_Prescott100**  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois
- ☒ **az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois
- ☒ **IOS 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set
- ☒ **ios 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set
- ☒ **Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

1. Select multiple work orders from the work order list

2. Click on the Export button

# Export Forms in Various Formats

**Trimble Unity** | Valve Inspector

DASHBOARD WORK ORDER (5)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated

**VL\_Prescott100**  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois

**az 06-01 1558**  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

**ios 06-04 2247**  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

**ios 06-03 1655**  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**Need inspection**  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

**Export 1 Items**

Spatial Reference Select

Format\* Select

Note

ESRI GDB  
Excel  
Shapefile

CANCEL EXPORT

**VL\_Prescott100**  
Valve Inspector

Status: Completed  
Date: Jul 09, 2018  
Priority: Medium

**Address**

Address Line 1:  
Address Line 2:  
Address Line 3:  
Address Line 4:  
Address Line 5:  
Address Line 6:  
City:  
County:  
State:  
Postcode:

Naperville  
DuPage County  
Illinois

From the Export options popup. Select the export file Format and then click on the Export button  
If you need to export in a spatial reference other than the default, you can select it from the dropdown



# Export Forms

**Trimble Unity** | Valve Inspector

DASHBOARD WORK ORDER (5)

Search...

All Priority Status (4) Assigned To: Rami Naber MORE FILTERS Saved Filters: My Work Orders

Sort By: lastUpdated ↓

Find address or place

**M** VI\_Prescott100  
Valve Inspector • Assigned To Rami Naber  
Completed • 3 Assets  
Naperville DuPage County Illinois

**E** az 06-01 1558  
Valve Inspector • Assigned To Rami Naber  
On Site • 13 Assets  
1025 Forest View Ct Naperville DuPage County Illinois

ios 06-04 2247  
Valve Inspector • Assigned To Rami Naber  
Opened • 4 Assets  
Address not set

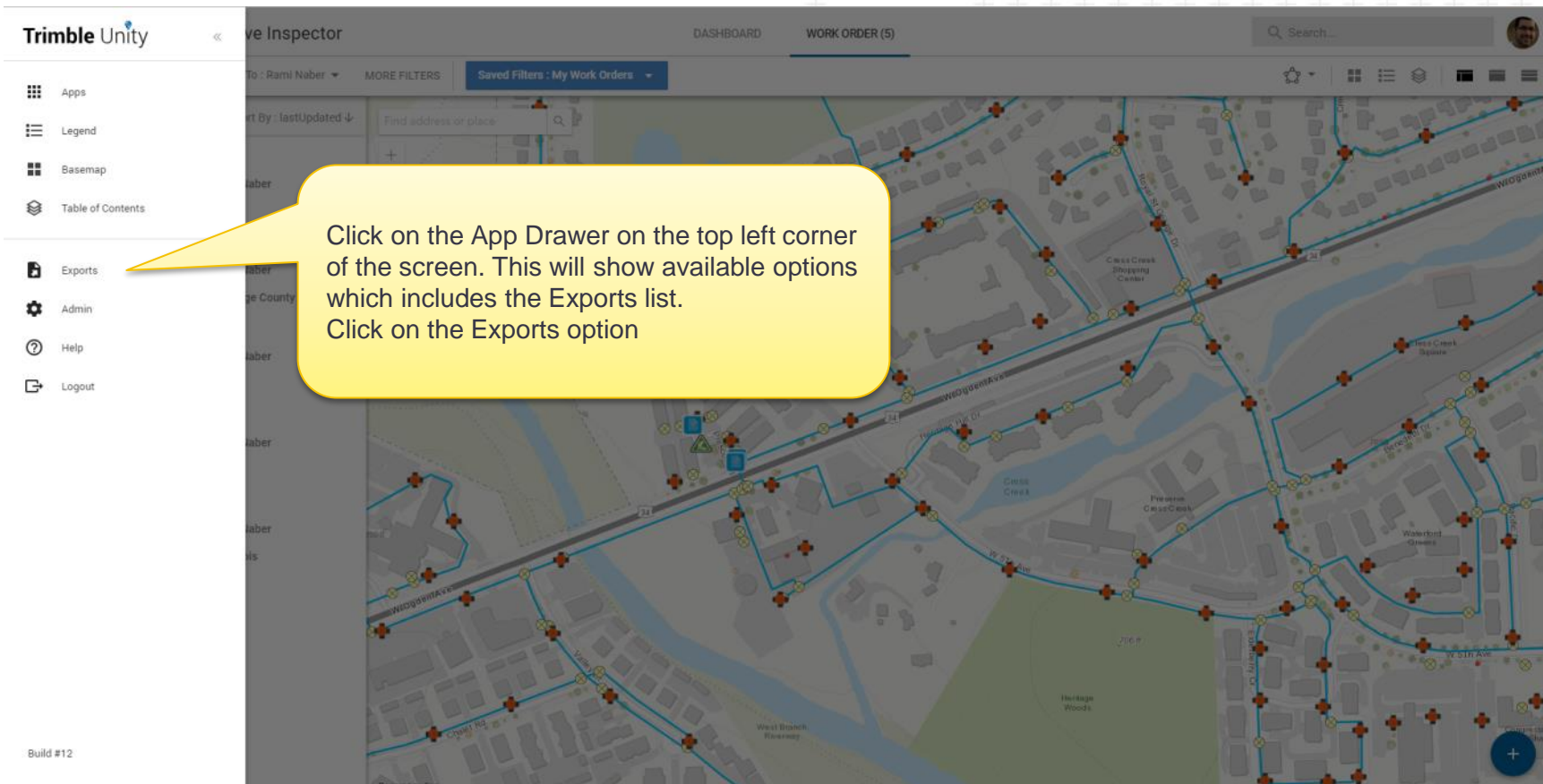
ios 06-03 1655  
Valve Inspector • Assigned To Rami Naber  
Opened • 1 Assets  
Address not set

**L** Need inspection  
Valve Inspector • Assigned To Rami Naber  
Opened • 0 Assets  
1329 Branchwood Cir Naperville Illinois

Export started VIEW

A toast message will be displayed when the export is started and when it is completed. When the export is completed, the Download option will become available to download the file directly from here – otherwise you can download it from the Exports List...

# Export Forms
















The screenshot displays the Trimble Unity web application interface. On the left, the 'App Drawer' is visible, listing various options: Apps, Legend, Basemap, Table of Contents, Exports, Admin, Help, and Logout. The 'Exports' option is highlighted with a yellow callout box. The main area shows a map view with a network of blue lines and red markers, representing a project area. The top navigation bar includes the Trimble Unity logo, a search bar, and tabs for 'Dashboard' and 'Work Order (5)'. A yellow callout box points to the 'Exports' option in the App Drawer, containing the following text:

Click on the App Drawer on the top left corner of the screen. This will show available options which includes the Exports list. Click on the Exports option

Build #12

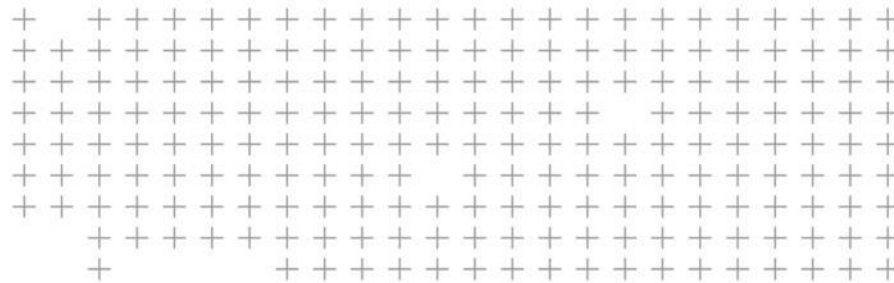
# Exports List

## × Exports

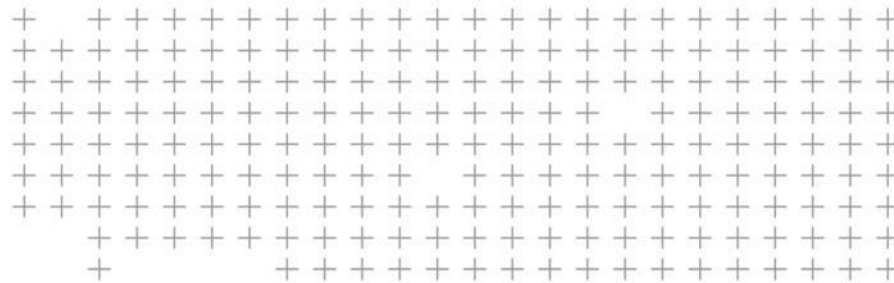
Type	User	Format	From	To	Work Orders	Export Date	Notes	Status	
WO	Rami Naber	Excel			VL_Prescott100	7/9/2018 6:20 PM		Succeeded	
WO	Joaquin SJ iPhone	Excel			wo06062018_1	6/21/2018 9:04 PM	Joaquin	Succeeded	
WO	michael coffey	Shape file						Succeeded	
WO	michael coffey	Excel						Succeeded	
WO	Rami Naber	Excel						Succeeded	
WO	Rami Naber	Excel			ValveInspection0...	1/3/2018 9:14 PM		Succeeded	
WO	Boat Administrator	ESRI GDB			JM_VL_895, IAM2...	10/6/2017 9:32 PM		Succeeded	
WO	Rami Naber	ESRI GDB			IAM2017-01	9/27/2017 1:31 PM		Succeeded	
DR	michael coffey	Excel	3/1/2017	9/7/2017		9/19/2017 4:00 PM		Succeeded	
DR	michael coffey	Excel	8/14/2017	9/19/2017		9/19/2017 4:00 PM		No Forms	
DR	michael coffey	Excel	9/4/2017	9/19/2017		9/19/2017 4:00 PM		No Forms	
DR	michael coffey	Excel	3/1/2017	9/11/2017		9/11/2017 3:49 PM		Succeeded	
DR		Excel	3/1/2017	4/30/2017		4/11/2017 9:32 PM		Succeeded	
DR		Excel	3/1/2017	4/30/2017		4/11/2017 9:30 PM		Succeeded	
DR		ESRI GDB	3/1/2017	4/30/2017		4/11/2017 9:30 PM		Succeeded	

Click on the download button to download the exported file.



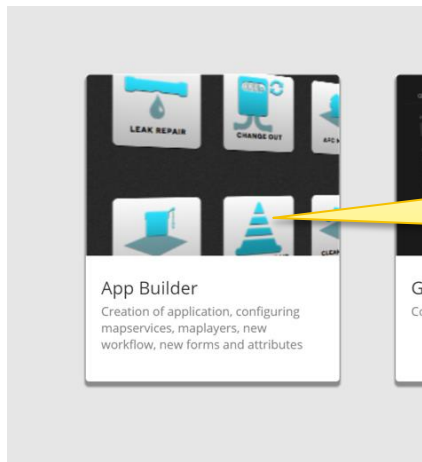


# Using the App Builder

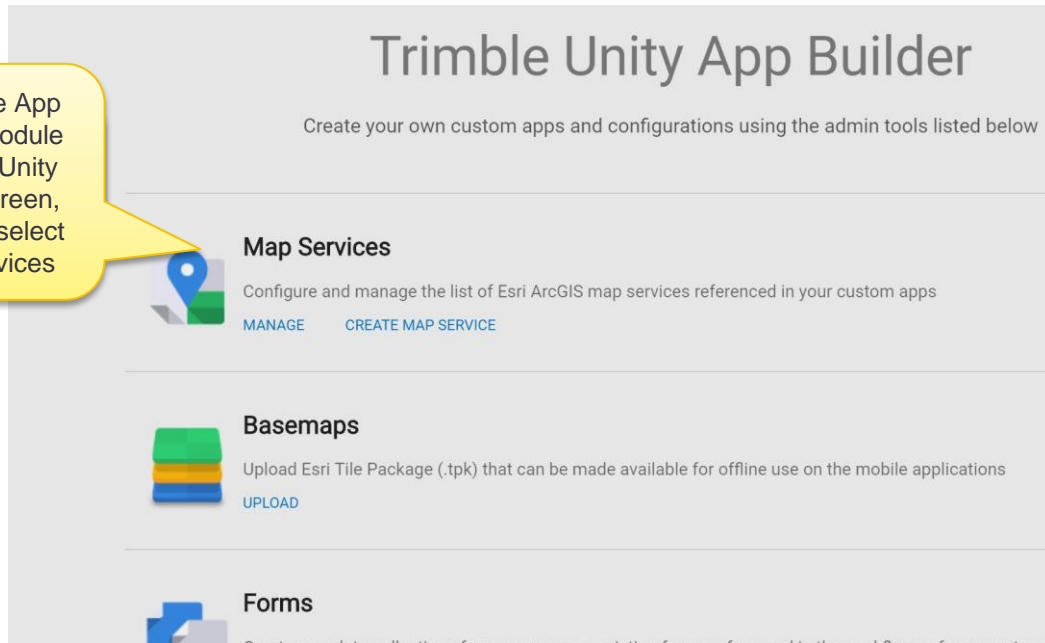


# Configuring Feature and Map Services for Use in Apps

# Accessing the Map Services Config Function



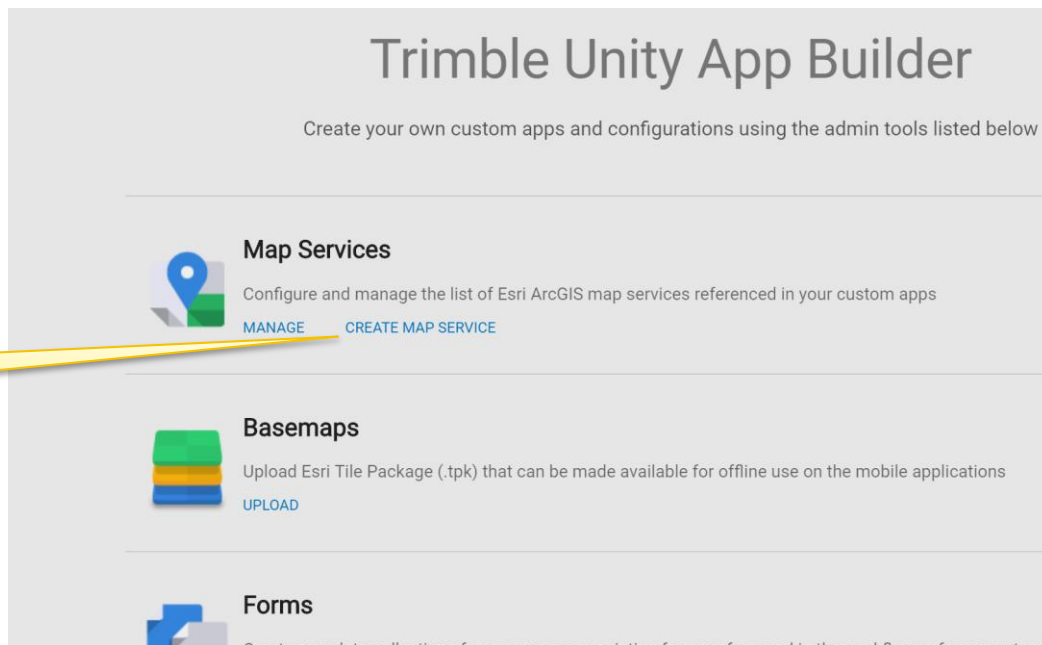
Select the App Builder module from the Unity Admin screen, and then select Map Services



# Creating a new Map Service

The Map Service module allows you to link Unity to map services published from an ArcGIS server. This includes both Map services (basemaps), and Feature Services (GIS features, network layers etc.). Once the link is created in Unity, it is available for inclusion in new apps created via the App Builder, both on Unity Web (as an online service), and on the mobile device (as an offline cache for feature services, and as an online basemap for map services)

To create a new Map Service, select  
Create Map Service



# Creating a new Map Service

Add Map Service

Cancel

Save

Name\*

Provide a name for the service

URL\*

Provide the url that identifies the publishing source for the service

Username

Password

If the service requires a username and password

# Creating a new Map Service

≡ Trimble Unity

RN

App Builder

## Map Services

Once saved, the service will appear in the map service list, here you can see the typical format for the urls, with Map Services ending in MapServer, and feature services ending in FeatureServer

Edit Delete

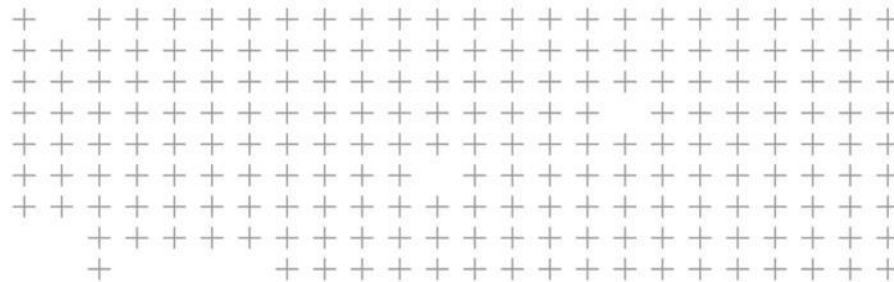
New

Name	URL
Sales Clean Water	https://useast-arcgis.trimbleunity.com/arcgis/rest/services/tenant_sales/WaterAssetsMer/MapServer
Sales Waste Water	https://useast-arcgis.trimbleunity.com/arcgis/rest/services/tenant_sales/WasteAssetsMer/FeatureServer
ESRI World Street	https://server.arcgisonline.com/ArcGIS/rest/services/World_Street_Map/MapServer
ESRI Topo	https://server.arcgisonline.com/ArcGIS/rest/services/World_Topo_Map/MapServer
BDTest2	https://services.arcgis.com/X3EAXocno9eyvCvV/ArcGIS/rest/services/MahonTest/FeatureServer
Leaks	https://useast-arcgis.trimbleunity.com/arcgis/rest/services/tenant_sales/leak/FeatureServer
Sales Storm Water	https://useast-arcgis.trimbleunity.com/arcgis/rest/services/tenant_sales/StormAssetsMer/FeatureServer
ESRI Aerial	https://server.arcgisonline.com/ArcGIS/rest/services/World_Imagery/MapServer

You can also create a new service from the service list, or edit/delete an existing one

Once a map service has been created it will appear as an option in the map service definition area of the app builder (to be covered later)

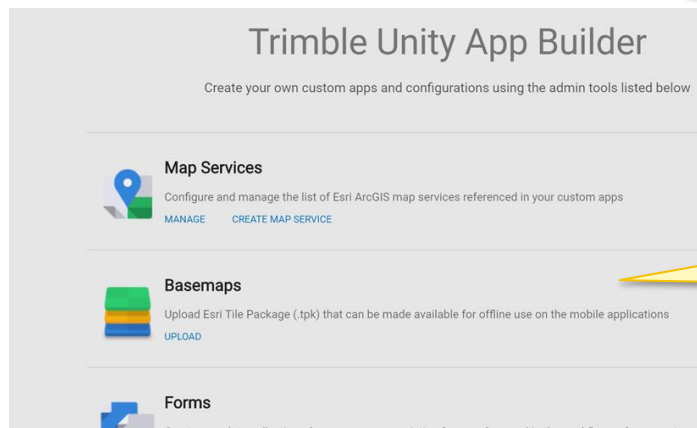




# Uploading offline basemaps (TPKs)

# Creating a new Map Service

Similarly to map services, you can upload a pre-defined .tpk file that can be made available for offline use when network connectivity is too poor for use of online map services



To upload a basemap TPK select  
Basemaps

# Creating a new Map Service

## Basemap Setup

Upload Esri Tile Package (.tpk)

Basemap Name\*

Provide a display name for the basemap

Esri Tile Package (.tpk)

Browse

Browse to select the TPK file

Local office

Because TPK files are typically large you may want to restrict the area to users for a specific district or Local Office in Unity terms. Here you can specify that a basemap will only appear as a download option for users assigned to a specific Local Office

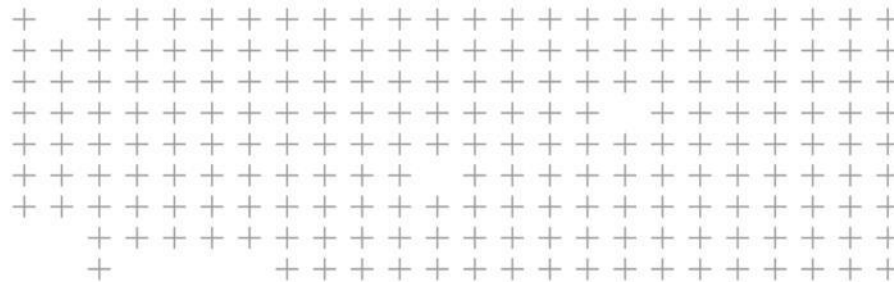
Download Configuration

Wifi :

Mobile :

Here you can specify the conditions under which the TPK will download when connected via wifi, mobile (cellular). You can specify that the TPK will automatically download, download after manual confirmation, or not at all, when connected to either wifi or cellular networks

[Upload Tile Basemap](#)



# Creating a Form using the Form Builder

# Accessing Form Builder

Forms are the basic building blocks for data collection in Unity, the Form Builder allows the user to define and edit forms that can be used across one or more apps, and where necessary to import existing forms from other Unity instances



## Map Services

Configure and manage the list of Esri ArcGIS m

[MANAGE](#)

[CREATE MAP SERVICE](#)



## Basemaps

Upload Esri Tile Package (.tpk) that can be ma

[UPLOAD](#)



## Forms

Create new data collections forms or manage

[MANAGE](#)

[CREATE FORM](#)

Select to create a new form, or manage an existing form



## Apps

Create new apps or manage existing apps and

[MANAGE](#)

[CREATE APP](#)

# Form Manager

## Form Manager

Edit or Delete selected form

Share

Edit

Delete

Import

New Form

The 'Share' option triggers the system to generate a url, this url can then be used to import the form into another Unity instance (see later)

Create a new form

Title	Description	Created	Used By
Afnan	Afnan flower form	Jan 23rd 2017	Afnan Alshkeili
AlFieldTypesForm	All Types Form	Apr 11th 2018	Mark O'Callaghan
ALTPF_4-ALTPF_4-0 Form	ALTPF_4-ALTPF_4-0 Form	May 30th 2018	Unity Integration
ALTPF_5-ALTPF_5-0 Form	ALTPF_5-ALTPF_5-0 Form	May 31st 2018	Unity Integration
ALTPF_6-ALTPF_6-0 Form	ALTPF_6-ALTPF_6-0 Form	May 31st 2018	Unity Integration
ANDREW1-ANDREW1-0 Form	ANDREW1-ANDREW1-0 Form	Jun 11th 2018	Unity Integration
ANDREW2-ANDREW2-0 Form	ANDREW2-ANDREW2-0 Form	Jun 11th 2018	Unity Integration
ANDREW3-ANDREW3-0 Form	ANDREW3-ANDREW3-0 Form	Jun 11th 2018	Unity Integration
ANDREW4-ANDREW4-0 Form	ANDREW4-ANDREW4-0 Form	Jun 11th 2018	Unity Integration
Andrew Investigation_test-AAAAAAA-...	Andrew Investigation_test-AAAAAAA-...	May 10th 2018	Mark O'Callaghan



# Form Manager – Setup

## New Form

CANCEL

SAVE

SETUP

TEMPLATES

PAGES

Form Name\*

TrainTestForm

Description\*

TrainTestForm

Geometry Type\*

Point

Symbology

Shape



Fill Color



#2ea2ff

Point Size



8

Scoring

Automatically calculate an asset condition or regulatory compliance scoring, based on configured questions' weight and value scoring. Choose from the list of available score calculation algorithms.

Scoring Algorithm

Default Algorithm

Auto Generate Report

Automatically generate a PDF report that includes the form data when completing the work order or job.

Input form name. Usually good practice to keep it as short as possible

Form description

Every form needs a geometry associated with it (only 1 geometry/form). It can be a point, a polyline and polygon. This determines how the form is represented when displayed on the map. You can customise size of the point and colour

Turn on scoring. Allows you to associate scores with specific dropdown fields, and calculates an overall score for the form. Used for asset condition assessment, or regulatory or other audits or inspections. Standard scoring algorithm available, customised scoring algorithms could be added

When switched on, the system automatically generates a pdf report pulling together the form fields and photographs

# Form Manager - Templates

Templates are useful feature when you have a form where there will be a lot of repeated sequences of questions. Creating a template allows you to drag a template onto a form rather than the individual fields.

## New Form

CANCEL

SAVE

SETUP

TEMPLATES

PAGES

### TEMPLATES

Create question templates that can be used in the form designer. The templates reduce the effort for configuring and updating repetitive questions on the form, especially ones with multi-choice values and scoring. Note that changes made on the templates will be reflected on all form references for the templates

NEW TEMPLATE

NEXT

Create a new template, or skip to building the form.

# Form Manager – Creating a Template

← TrainTestTemplate

CANCEL

SAVE

FIELDS

DATA

Text

Integer

Decimal

Date

Boolean

Multiple Choice

Here we have created a template called TrainTestTemplate with 3 fields of different types. We add the fields to the template by 'dragging' them from the 'menu of field types' on the left to the centre of the template area. We will field types and adding fields to the form in more detail in the next section

Asset Question 1  
Boolean

Scoring

DependentField1  
Multiple Choice

Conditional

Other Text  
Text

Conditional

Drag fields here

# Form Manager – Creating a Template

← TrainTestTemplate

CANCEL

SAVE

FIELDS

DATA

Text

Integer

Decimal

Date

Boolean

Multiple Choice

Here we have created a template called TrainTestTemplate with 3 fields of different types. We add the fields to the template by 'dragging' them from the 'menu of field types' on the left to the centre of the template area. We will field types and adding fields to the form in more detail in the next section

Asset Question 1  
Boolean

Scoring

DependentField1  
Multiple Choice

Conditional

Other Text  
Text

Conditional

Drag fields here

# Form Manager – Creating a Template

SETUP

TEMPLATES

PAGES

After saving the template, it is shown in the list of templates, select next to start building the overall form

NEW TEMPLATE

NEXT

## TEMPLATES

Create question templates that can be used in the form designer. The templates reduce the effort for configuring and updating repetitive questions on the form, especially for multi-choice values and scoring. Note that changes made on the templates will be reflected on all form references for the templates

TrainTestTemplate

Scoring

Conditional

# Form Manager – Adding Fields

The screenshot displays the 'Form Manager' interface. The top navigation bar includes 'SETUP', 'TEMPLATES', and 'PAGES'. The left sidebar, titled 'FIELDS', is expanded to show various field types categorized into DATA, IMAGE, LAYOUT, GEOMETRY, and TEMPLATES. The main workspace shows the configuration for 'TrainTestForm', which has a 'Form Geometry: Point'. A 'Drag groups here' box is visible in the center. Several callout boxes provide additional information:

- Data Fields:** Select from the different data types available
- Signature field:** Allow a signature to be captured on the form
- Groups:** A form can be split into a number of tabs by using groups. This allows related sets of fields to be organised under separate tabs. Can be useful for forms with a large number of fields
- Geometry field:** Every form must have a geometry field and you will be unable to save the form without one.
- Templates:** Here we see the template we created in the previous step



# Form Manager – Adding a Group

## New Form

Groups are used to organise a form into related sets of fields. On the mobile device Groups are represented in different tabs on the form

CANCEL SAVE

SETUP

TEMPLATES

PAGES

FIELDS

DATA

Text

Integer

Decimal

Date

Boolean

Multiple Choice

Barcode

IMAGE

Signature

LAYOUT

Group

GEOMETRY

Geometry

### TrainTestForm

TrainTestForm  
Form Geometry: Point

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

#### General Details

Drag fields here

Click and Drag a group from left hand side over the centre of the form, once a group has been added you can start adding fields to the group

Inspection Details

Drag fields here

# Form Manager – Adding a Group

## New Form

Groups are used to organise a form into related sets of fields. On the mobile device Groups are represented in different tabs on the form

CANCEL SAVE

SETUP

TEMPLATES

PAGES

FIELDS

DATA

Text

Integer

Decimal

Date

Boolean

Multiple Choice

Barcode

IMAGE

Signature

LAYOUT

Group

GEOMETRY

Geometry

### TrainTestForm

TrainTestForm  
Form Geometry: Point

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

#### General Details

Drag fields here

Click and Drag a group from left hand side over the centre of the form, once a group has been added you can start adding fields to the group

Inspection Details

Drag fields here

# Form Manager – General Field Details

There are variations in the attributes available for various types of fields - but many of the attributes are the same –in this example we are viewing the attributes for a text field

DATA
Text
Integer
Decimal
Date
Boolean
Multiple Choice
Barcode
IMAGE
Signature
LAYOUT
Group
GEOMETRY
Geometry
TEMPLATES
Search
TrainTestTemplate

## TrainTestForm

TrainTestForm  
Form Geometry: Point

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

### General Details

Question Type Text

Question\* ?

Default Value

#### Advanced Options

- ☐ Required
- ☐ Read-Only
- ☒ Allow edits after save
- ☒ Include in auto generated reports if value not set
- ☐ Enable copying across forms
- ☐ Conditional question
- ☐ Expression for default value ?

Indicates the type of field

Question is the label for the field as it appears on form.

For a Text field you can supply a default value

In the advanced options you can determine:

**Required:** Field is mandatory

**Read-only:** Used when field is pre-populated and can't be edited

**Allow edits after save:** Can be edited after completion on the mobile device

**Include in auto-generated reports if value not set:** Determine if fields left blank are included in the auto-generated PDF

**Enable Copying Across Forms:** When data capture is repetitive (e.g. capturing hydrant details in field) Unity allows copy of fields across to next form in sequence

**Conditional question:** Controls whether a field is made visible based on answer to a prior question

**Expression for default value:** You can default a value for a field based on an existing characteristic on the asset associated with a form, or a field on the associated WO (more details will be provided later)

Drag fields here

# Field Types

- The following field types are available via the form builder, some will be covered in more detail in later slides:
  - **Text:** A free text field – few restrictions on entry
  - **Integer:** Only allows integers to be input
  - **Decimal:** Allows floating point values to be input
  - **Date:** Data input is via a standard date widget
  - **Boolean:** Yes/No response required
  - **Multiple Choice:** Allows selection from a number of pre-defined options, can be multi-select. Presented either as radio buttons/checkboxes, or scrolling list depending on number of options
  - **Barcode:** Allows input via a barcode scan.
  - **Signature:** Allows capture of a signature
  - **Geometry:** Allows capture of geometry either via GPS capture or digitization on map

# Form Manager – Multiple Choice Fields

DATA
Text
Integer
Decimal
Date
Boolean
Multiple Choice
Barcode
IMAGE
Signature
LAYOUT
Group
GEOOMETRY
Geometry
TEMPLATES
Search
TrainTestTemplate

## TrainTestForm

TrainTestForm  
Form Geometry: Point

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

Question Type Multiple Choice

Question\* 

Scoring

Options\*

Option

Option 1

Option 2

Option 3

[Add option](#)

### Advanced Options

- ☐ Required
- ☐ Read-Only
- ☒ Allow edits after save
- ☒ Include in auto generated reports if value not set
- ☐ Enable copying across forms
- ☐ Conditional question
- ☐ Allow Multi-Select

If scoring has been enabled for a form, this option is available (see later)

Ordering of options can be controlled

Multiple choice options added via Add Option

Allow multi-select changes mobile presentation from Radio buttons to Checkboxes

CANCEL SAVE

# Form Manager – Multiple Choice Fields

Enabling scoring for a multiple choice field allows you to attribute a defined 'score' to the options in the field. You can also associate a specific 'traffic light' colour to the option which is highlighted on the form on the mobile device. If scoring is enabled on a form, on the mobile device a summary aggregate score for the form will be calculated and displayed on the summary page of the form, along with a summary score for each group on the form.

Question Type Multiple Choice

Question\*

Scoring ☒

Score Weight\*

Options\*

Option	Score	Color	
High	<input type="text" value="3"/>	<input type="color" value="#00FF00"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑"/>
Medium	<input type="text" value="2"/>	<input type="color" value="#FFA500"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑"/>
Low	<input type="text" value="1"/>	<input type="color" value="#FF0000"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑"/>

[Add option](#)

The weighting determines the percentage weighting this question should contribute to the overall score.

Assign a score and a colour to each option  
NOTE: the score for a field is calculated based on the percentage of the maximum score, i.e. if max score is 3, then a score of 2 gives 2/3 or 66%

▼ Advanced Options

- ☐ Required
- ☐ Read-Only
- ☒ Allow edits after save
- ☒ Include in auto generated reports if value not set
- ☐ Enable copying across forms
- ☐ Conditional question

Note that multi-select is no longer available as an option as scoring does not work with multi-select fields



# Form Manager – Conditional Fields

You can create conditional or branching questions by making one or more questions conditional on the answer supplied for a preceding question. Typically the preceding question will be a multiple-choice or Boolean question.

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

Select the field upon which this field will be conditional

Select the response that will trigger this field to be visible

You can also make it conditional on Condition 1 OR Condition 2 etc.

Valve Manufacturer  
Multiple Choice

Question Type Text

Question\* [?] Valve Manufacturer - Other

Default Value

Advanced Options

Allow edits after save

Include in auto generated reports if value not set

Enable copying across forms

☒ Conditional question

Valve Manufacturer is Other

ADD CONDITION

☐ Expression for default value [?]

# Form Manager – Defaulting using an expression

It can sometimes be useful to default values onto the form from either the asset the form is associated (if any) or the WO, e.g. the valve type, or the Location field from the WO details.

**NOTE:** the asset fields/attributes are taken from the asset as represented in the network layers

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

## General Details

Question Type

Expression for Default

Text

Question\*



Inspector

Default Value

### Advanced Options



Required



Read-Only



Allow edits after save



Include in auto generated reports if value not



Enable copying across forms



Conditional question



Expression for default value

workOrder.Location

The format for the expression is either  
asset.<fieldname>, or  
workOrder.<fieldname> depending on  
whether the field is held on the asset or the  
WO

CANCEL SAVE

# Form Manager – Adding a template to a form

When adding a predefined template to a form, the process is identical to adding a single field in that you just drag the template onto the main form area.

You can create a multi-page form by adding groups to the layout. Drag and drop fields to each of the added groups. You can also configure the sort order and the properties of each field you add, including conditional rules. Note that the Geometry field is required on the form.

Remember the fields within a template still have to be unique within the form

FIELDS

DATA

Text

Integer

Decimal

Date

Boolean

Multiple Choice

Barcode

IMAGE

Signature

LAYOUT

Group

GEOMETRY

Geometry

TEMPLATES

Search

TrainTestTemplate

Multiple Choice

Valve Manufacturer - Other

Text

Conditional

Template Type Train TestTemplate

Question Type Boolean

Question Asset Question 1

Score Weight\* 100

Question Type Multiple Choice

Question DependentField1

Conditional

Question Type Text

Question Other Text

Conditional

# Form Manager – Re-ordering fields in a form

The diagram illustrates the process of re-ordering form fields. It features two panels, each with a 'General Details' section and an 'Inspection Details' section. The left panel shows the initial arrangement of fields. The right panel shows the result after re-ordering, with fields moved between sections. A yellow callout box at the bottom explains that fields can be moved simply by drag and drop, even between different groups.

**Left Panel (Initial State):**

- General Details:**
  - Inspector (Text)
  - Location Of Valve (Geometry)
  - Valve Manufacturer (Multiple Choice)
  - Valve Manufacturer - Other (Text, Conditional)
  - Asset Question 1 (Template, Scoring, Template)
  - Drag fields here
- Inspection Details:**
  - Drag fields here

**Right Panel (Re-ordered State):**

- General Details:**
  - Inspector (Text)
  - Asset Question 1 (Template, Scoring, Template)
  - Valve Manufacturer (Multiple Choice)
  - Valve Manufacturer - Other (Text, Conditional)
  - Drag fields here
- Inspection Details:**
  - Location Of Valve (Geometry)
  - Drag fields here

The order of fields in a form can be changed simply by drag and drop. Fields can be moved between groups as well

# Form Manager – Saving forms

New Form

SETUP

TEMPLATES

PAGES

CANCEL

SAVE

Click on Save to save the form

Form Manager

Share Edit

Import

New Form

Title	Description	Date Created	Created By	Used By
Valve Inspection Demo	Valve Inspection Demo	Mar 6 2016	Rami Naber	Inspecao valvula,Leak Liver
Valve notes	notes	Jun 16 2016	Boat Administrator	Gas Inspections
Valve Operation	Valve Operation	Jul 20th 2018	Boat Administrator	
Valve Operation	Valve Operation	Jul 19th 2018	Boat Administrator	
Valve Operation	Valve Operation	Jul 19th 2018	Boat Administrator	
Valve Operation	Valve Operation	Jul 20th 2018	Boat Administrator	
Valve Operation	Valve Operation	Jun 22nd 2018	Power User	
Valve Operation	Valve Operation	Apr 18th 2018	Adrian ONia	Meter Survey
Valve Operation	Valve Operation	Aug 14th 2018	Rami Naber	
Valve Operation	Valve Operation	Apr 21st 2016	Matt Morris	
Valve Operation	Valve Operation	Mar 20th 2017	michael coffey	Vero Track Leak
Valve Operation	Valve Operation	Mar 20th 2017	michael coffey	Vero Track Leak
Valve Operation	Valve Operation	Nov 21st 2017	michael coffey	Valve Inspect SA
Valve Operation	Valve Operation	Mar 23rd 2017	michael coffey	Vero Track Leak
Valve Operation	Valve Operation	Oct 11th 2017	Jeff Smith	Wal-Mart
Valve Operation	Valve Operation	Oct 11th 2017	Jeff Smith	Wal-Mart
Valve Operation	Valve Operation	Jul 19th 2018	Boat Administrator	

The draft form is saved in the Form Manager list, select it again and select Edit to update it.

Once a form is created it needs to be linked into an app – which will be covered in the next section

# Form Manager – Copying forms across instances

The screenshot shows the 'Form Manager' interface with a table of forms. The table has columns: Title, Description, Date Created, Created By, and Used By. The forms listed include 'manhole mapper', 'Leak Detection form for American Leak', and 'Andrew Valve Inspection'.

**Share Dialog:** A dialog box titled 'Share' is open. It contains the text: 'The link below will allow you to share the selected forms to another instance of Trimble Unity.' Below the text is a text input field containing the link: '70fe9683-7b21-4bec-8f68-46b56c6b5dde'. There is a 'Copy' button and a 'DONE' button.

**Import Forms Dialog:** A dialog box titled 'Import Forms' is open. It contains the text: 'Input the link of the form(s) to be imported'. Below the text is a text input field containing the link: '70fe9683-7b21-4bec-8f68-46b56c6b5dde'. There is a 'NEXT' button.

**Callout Boxes:**

- Click on 'Share' on instance A, and a link is generated, copy it
- Select Import in instance B, and paste the link into the Import dialogue

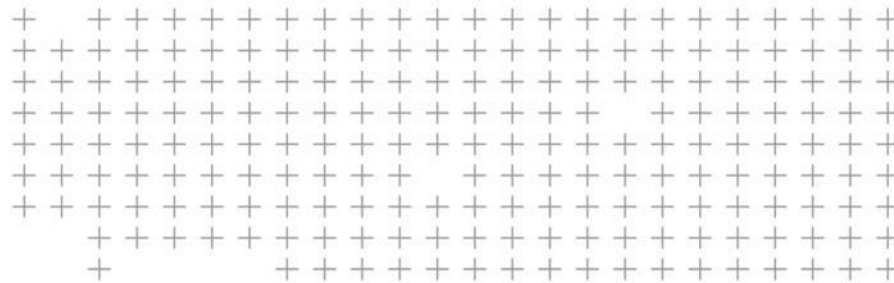




# Form Builder Tips



- Keep form names relatively short
- Try to be succinct with questions – due to uniqueness constraint may have many variants of same question
- Zoom browser down from 100% - will make it easier to add fields in a large form



# Creating an App using the App Builder

# Accessing App Builder



## Map Services

Configure and manage the list of Esri ArcGIS m

[MANAGE](#)

[CREATE MAP SERVICE](#)



## Basemaps

Upload Esri Tile Package (.tpk) that can be ma

[UPLOAD](#)



## Forms

Create new data collections forms or manage

[MANAGE](#)

[CREATE FORM](#)



## Apps

Create new apps or manage existing apps and

[MANAGE](#)

[CREATE APP](#)





















The App is the primary entity the user interacts with and it pulls together the spatial elements, the forms and the workflow.

Select to create a new app, or manage an existing app

# App Manager

## App Manager

New App

 AP Test App 4- APTEST04 App <small>AP Test App 4-APTEST04 App</small>	 AP Test Job 2- APTEST02 App <small>AP Test Job 2-APTEST02 App</small>	 Commercial Meter <small>Commercial Meter Waterford</small>	 Job Plan created for Unity FCOMP Work Flow testing-SITFCOMPJP App <small>Job Plan created for Unity FCOMP Work Flow testing- SITFCOMPJP App</small>	 Laura's Test App <small>Laura's Test App</small>
 Meath Mapper-v2 <small>Mapping facility for Meath CoCo</small>	 PDF_Reports <small>this is a test for generating reports</small>	 PFI-PFISCOREA App <small>PFI-PFISCOREA App</small>	 Planned Leak Detection <small>Planned Leak Detection (Trimble) - DWBGSURALD</small>	 Planned Leak Detection <small>Planned Leak Detection DWBGINVALD App</small>
 Planned Leak Detection- UAT_JOBPLA App <small>Planned Leak Detection- UAT_JOBPLA App</small>	 Post Flooding Investigation <small>Post Flooding Investigation- WWBGINVPL App [pp]</small>	 SCOREWF-SCOREWF App <small>SCOREWF-SCOREWF App</small>	 StormWaste Mapper <small>Storm Water/Waste Water mapper</small>	 UAT Fit a meter test AP- FITMETERAP01 App <small>UAT Fit a meter test AP- FITMETERAP01 App</small>
 UAT Fit a meter test-	 UAT Fit a meter test TW-	 UAT_Line	 UAT_POINT	 UAT_POLYGON

The app manager shows all the apps on the instance including draft and published app, from here you can Create a new app or edit an existing one.

# App Manager – Creating a New App

testTrainApp

Cancel

Save as draft

Publish App

General

Map Service Layers

Basemaps

Workflows

Forms

Users

Publish

## General

### App Info

Provide an application name and description. The name will be used as the title of the app when it is published. You also have the option to upload an image to be used for the app.

App Name\*

testTrainApp

Description\*

testTrainApp

Icon\* 

Preview of how the icon will look on various platforms



Mobile



Web

[Change Icon](#)

OR

[Use Default Icon](#)

Next

You can save the app as a draft at any point (after minimum data has been supplied), or Publish the app

You need to supply an App Name, a description for the app, and an icon for the app. The icon can be any image of size 90x90 pxl. Or the default icon can be used, next we will define the map services to use...

# Creating a New App – Configure Map Services

General > Map Service Layers > Settings > Workflows > Forms > Users > Publish >

## Map Service Layers

### Esri Map Service Config

You can add to your app reference to GIS layers from one or more Esri map services. Select the GIS map service(s) to add to your app. The wizard will walk you through the steps to configure the individual GIS layers for your app.

Feature Service: -- Please Select --

- Hotel\_Sites
- Tramming\_Lottery
- Unity Clean Water Service
- Unity Waste Water Service
- Unity Storm Water Service
- Dev GIS
- Subhaah
- Test Alan

You must select feature service

No Map Service Added

Next

You can add as many map services as you require

Select a map service to add to the app

Configure the map service to determine:

1. Features shown by default
2. Features returned in search results
3. Features returned and visible by default in search
4. Features that can be associated with a WO

## Map Service Layers

Esri Map Feature Service Config > Layer Config

### Layer Config

You can configure the visibility and behavior of GIS layers within the map service added on your app.

Next

Unity Clean Water Service Remove

Default Table Of Content (TOC) Group\* ?

Select All Deselect All

Layer Name	On by Default	Searchable	Visible by default in search results	Can be associated to Work Order	
Water Test Stations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Sampling Stations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Service Connections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Hydrants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Pumps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Network Structures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Control Valves	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Curb Stop Valves	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>

# Creating a New App – Configure Map Services

General > Map Service Layers > Settings > Workflows > Forms > Users > Publish >

## Map Service Layers

### Esri Map Service Config

You can add to your app reference to GIS layers from one or more Esri map services. Select the GIS map service(s) to add to your app. The wizard will walk you through the steps to configure the individual GIS layers for your app.

Feature Service: -- Please Select --

- Hotel\_Sites
- Tramming\_Lottery
- Unity Clean Water Service
- Unity Waste Water Service
- Unity Storm Water Service
- Dev GIS
- Subhaah
- Test Alan

You must select feature service

No Map Service Added

Next

You can add as many map services as you require

Select a map service to add to the app

Configure the map service to determine:

1. Features shown by default
2. Features returned in search results
3. Features returned and visible by default in search
4. Features that can be associated with a WO

## Map Service Layers

Esri Map Feature Service Config > Layer Config

### Layer Config

You can configure the visibility and behavior of GIS layers within the map service added on your app.

Unity Clean Water Service Remove

Default Table Of Content (TOC) Group\* ?

[Select All](#) [Deselect All](#)

Layer Name	On by Default	Searchable	Visible by default in search results	Can be associated to Work Order	
Water Test Stations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Sampling Stations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Service Connections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Hydrants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Pumps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Network Structures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Control Valves	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>
Water Curb Stop Valves	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<span>Delete</span>

Next



# Creating a New App – Configure Layer Groups and Labels

**Map Service Layers**

[Esri Map Feature Service Config](#) > [TOC Groups](#) > [Layer Order](#) > [Review](#)

### TOC Groups

You can change the layer alias into one or more groups.

**Change the layer alias (displayed label)**

Layer Alias (used in app)	Layer Name	TOC Layer Group(s)
<input type="text" value="Water Test Stations"/>	Water Test Stations	<input type="text" value="Water Network"/>
<input type="text" value="Water Sampling Stations"/>	Water Sampling Stations	<input type="text" value="Water Network"/>
<input type="text" value="Water Service Connections"/>	Water Service Connections	<input type="text" value="Water Network"/>
<input type="text" value="Water Hydrants"/>	Water Hydrants	<input type="text" value="Water Network"/>
<input type="text" value="Water Pumps"/>	Water Pumps	<input type="text" value="Water Network"/>
<input type="text" value="Water Network Structures"/>	Water Network Structures	<input type="text" value="Water Network"/>
<input type="text" value="Water Control Valves"/>	Water Control Valves	<input type="text" value="Water Network"/>

**Change the ToC Group the layer is associated with**

[Next](#)

# Creating a New App – Configure Layer Order

**Map Service Layers**

[Esri Map Feature Service Config](#) > [TOC Groups](#) > [Layer Order](#) > [Review](#)

### Layer Order

You can change the display order of the layers within the defined TOC groups. Hovering the mouse over each layer will show controls to move the layer up or down.

[Next](#)

Layer Alias (used in app)	Layer Name
Water Network	
Water Test Stations	Water Test Stations
Water Valves	Water Valves
Water Service Connections	Water Service Connections
Water Hydrants	Water Hydrants
Water Pumps	Water Pumps
Water Network Structures	Water Network Structures

Use the up/down layers to change order

# Creating a New App – Configure Layer Order

Map Service Layers

[Esri Map Feature Service Config](#) > [TOC Groups](#) > [Layer Order](#) > [Review](#)

### Layer Order

You can change the display order of the layers within the defined TOC groups. Hovering the mouse over each layer will show controls to move the layer up or down.

Layer Alias (used in app)	Layer Name
Water Network	
Water Test Stations	Water Test Stations
Water Valves	Water Valves
Water Service Connections	Water Service Connections
Water Hydrants	Water Hydrants
Water Pumps	Water Pumps
Water Network Structures	Water Network Structures

Next

Use the up/down layers to change order

Selecting Next confirms end of map service configuration (with option to add further services)

Map Service Layers

[Esri Map Feature Service Config](#) > [TOC Groups](#) > [Layer Order](#) > [Review](#)

1 Map Service(s) Successfully Added

Continue

Add/Edit Services Edit Configuration

# Creating a New App – Configure Basemaps

The screenshot shows a web application interface for configuring basemaps. At the top is a navigation bar with tabs: General, Map Service Layers, Basemaps (selected), Workflows, Forms, Users, and Publish. Below the navigation bar is a section titled 'Basemaps' containing a 'Basemaps Config' panel. Inside this panel, there is a descriptive sentence and two green buttons: 'Copy Basemap Setup' and 'Select Basemaps'. Two yellow callout boxes are overlaid on the interface. The first callout points to the 'Copy Basemap Setup' button and contains the text 'You can copy the basemap set up from another app, or...'. The second callout points to the 'Select Basemaps' button and contains the text '...choose the basemaps you want for app'.

General > Map Service Layers > **Basemaps** > Workflows > Forms > Users > Publish >

**Basemaps**

**Basemaps Config**

You will be able to configure the basemaps you want to make available on the app you are configuring.

**Copy Basemap Setup**  
Copy Basemap Setup from another App

**Select Basemaps**  
Choose the basemaps for web and mobile

You can copy the basemap set up from another app, or...

...choose the basemaps you want for app

# Creating a New App – Configure Web Basemaps

General > Map Service Layers > **Basemaps** > Workflows > Forms > Users > Publish >

**Basemaps**  
Basemaps Config > Web Basemaps > Mobile Basemaps > Review

Web Basemaps

Next

You can select and add one or more basemaps to the app you are configuring. Also set the default visible basemap used on the Web application.

Basemap

-- Please Select --

Walmart

**Irish EPA Waterbodies**

ESRI Topo

WWUD\_Jeff

Dark Gray Canvas

ESRI Aerial

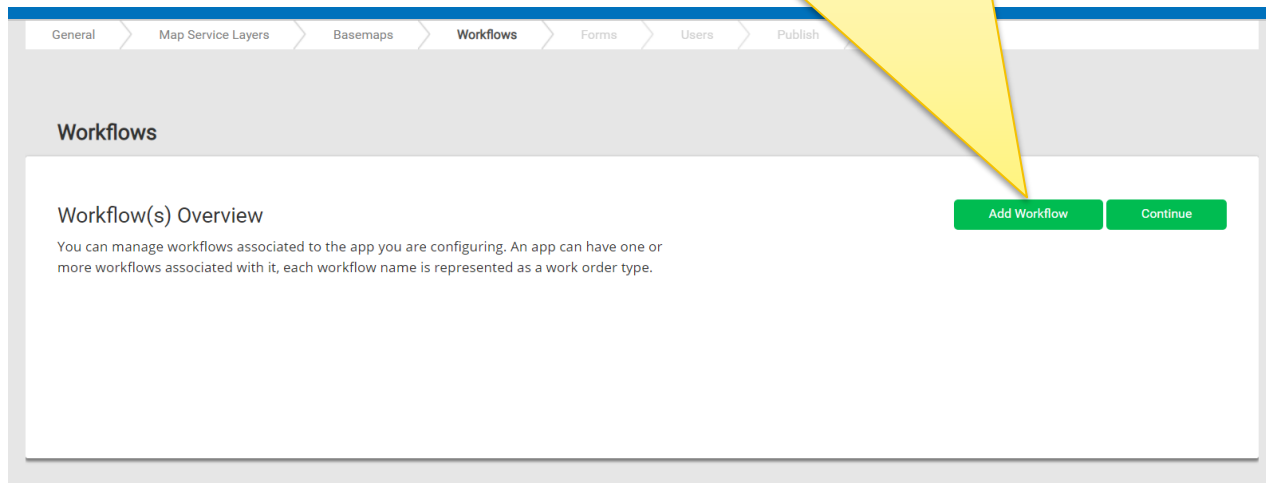
ESRI World Street

Select basemap to add for web app

No Web Basemap Added

# Creating a New App – Add Workflows

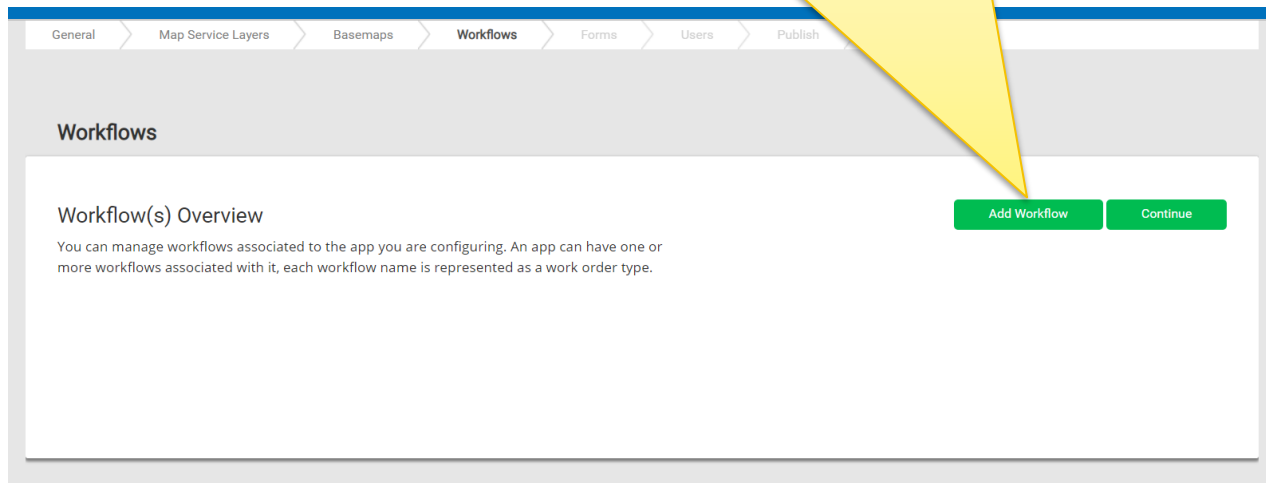
Workflows define the status and actions available for an app. It also determines the trigger points for data collection by associating workflow actions with specific forms. A workflow also relates to a Workorder type, typically there is only WO type/workflow associated with an app – however the capability for more than one exists.



The screenshot shows a web-based configuration interface for creating an app. At the top, there is a horizontal navigation bar with several tabs: 'General', 'Map Service Layers', 'Basemaps', 'Workflows' (which is currently selected and highlighted), 'Forms', 'Users', and 'Publish'. Below the navigation bar, the main content area is titled 'Workflows'. Under this title, there is a section labeled 'Workflow(s) Overview'. This section contains a paragraph of text: 'You can manage workflows associated to the app you are configuring. An app can have one or more workflows associated with it, each workflow name is represented as a work order type.' To the right of this text, there are two green buttons: 'Add Workflow' and 'Continue'.

# Creating a New App – Add Workflows

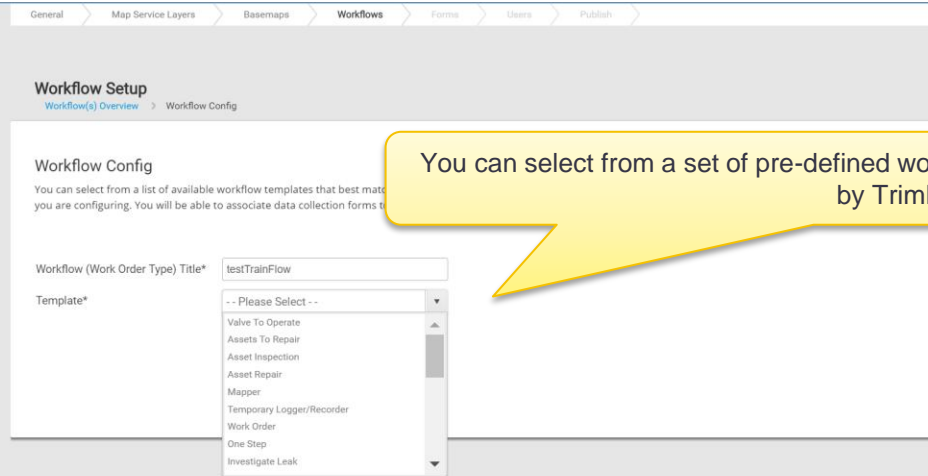
Workflows define the status and actions available for an app. It also determines the trigger points for data collection by associating workflow actions with specific forms. A workflow also relates to a Workorder type, typically there is only WO type/workflow associated with an app – however the capability for more than one exists.



The screenshot shows a web-based configuration interface for creating an app. At the top, there is a horizontal navigation bar with several tabs: 'General', 'Map Service Layers', 'Basemaps', 'Workflows' (which is currently selected and highlighted in blue), 'Forms', 'Users', and 'Publish'. Below the navigation bar, the main content area has a header 'Workflows' and a sub-header 'Workflow(s) Overview'. The text below the sub-header reads: 'You can manage workflows associated to the app you are configuring. An app can have one or more workflows associated with it, each workflow name is represented as a work order type.' At the bottom right of the main content area, there are two green buttons: 'Add Workflow' and 'Continue'.



# Creating a New App – Choosing a workflow



The screenshot displays the 'Workflow Setup' interface, specifically the 'Workflow Config' section. The breadcrumb trail at the top reads: General > Map Service Layers > Basemaps > **Workflows** > Forms > Users > Publish. Below the breadcrumb, the 'Workflow Setup' header is followed by 'Workflow(s) Overview' and 'Workflow Config'. The 'Workflow Config' section contains the text: 'You can select from a list of available workflow templates that best match the workflow you are configuring. You will be able to associate data collection forms to the workflow.' Below this text, there are two input fields. The first is 'Workflow (Work Order Type) Title\*' with the value 'testTrainFlow'. The second is 'Template\*' with a dropdown menu open, showing a list of pre-defined workflow templates. The dropdown list includes: '-- Please Select --', 'Valve To Operate', 'Assets To Repair', 'Asset Inspection', 'Asset Repair', 'Mapper', 'Temporary Logger/Recorder', 'Work Order', 'One Step', and 'Investigate Leak'.

Workflow Setup  
Workflow(s) Overview > Workflow Config

Workflow Config

You can select from a list of available workflow templates that best match the workflow you are configuring. You will be able to associate data collection forms to the workflow.

Workflow (Work Order Type) Title\* testTrainFlow

Template\*

- Please Select --
- Valve To Operate
- Assets To Repair
- Asset Inspection
- Asset Repair
- Mapper
- Temporary Logger/Recorder
- Work Order
- One Step
- Investigate Leak

You can select from a set of pre-defined workflows. Workflows need to be defined by Trimble

# Choosing a workflow – WO workflow only

General > Map Service Layers > Basemaps > **Workflows** > Forms > Users > Publish >

## Workflow Setup

[Workflow\(s\) Overview](#) > Workflow Config

### Workflow Config

[Next](#)

You can select from a list of available workflow templates that best match the workflow of the app you are configuring. You will be able to associate data collection forms to actions on the workflows.

Workflow (Work Order Type) Title\*

Template\*

### Work Order Workflow

This represents the workflow of the work order or job. The text in the boxes represent the statuses, and the text on the arrows represent the workflow actions.

Template Diagram

```
graph LR; Open[Open] -- Collect Data --> Surveyed[Surveyed]; Surveyed -- Complete --> Completed[Completed]; Open -- Reject --> Rejected[Rejected]; Rejected -- Re-Open --> Open;
```

When you select a template you are presented with a diagram illustrating the Statuses available and the Actions that trigger the change of status (and some of which will also trigger data collection forms). In this workflow, all the statuses and actions are at the WO level.

# Choosing a workflow – WO and Asset Level flow

General > Map Service Layers > Basemaps > **Workflows** > Forms > Users > Publish

## Workflow Setup

[Workflow\(s\) Overview](#) > Workflow Config

### Workflow Config

You can select from a list of available workflow templates that best match the workflow of the app you are configuring. You will be able to associate data collection forms to actions on the workflows.

Workflow (Work Order Type) Title\*

Template\*

### Work Order Workflow

This represents the workflow of the work order, statuses, and the text on the actions.

Template Diagram

```
graph LR; Open[Open] --> InProgress1[In Progress]; InProgress1 --> InProgress2[In Progress]; InProgress2 --> Complete[Complete]; Complete --> Completed[Completed]; Completed --> Validate[Validate]; Validate --> Validated[Validated]; Validated --> Close[Close]; Close --> Closed[Closed]; Open --> Returned[Returned]; Returned --> InProgress1; Complete --> Rejected[Rejected]; Rejected --> InProgress2; Complete --> AdHoc[Ad-hoc Inspection]; AdHoc --> Complete
```

### Asset Workflow

This represents the workflow on the assets associated to the work order or job. The text in the boxes represent the statuses, and the text on the arrows represent the workflow actions.

Template Diagram

```
graph LR; Pending[Pending] --> Inspected[Inspected]; Pending --> Failed[Failed]; Pending --> NotInspected[Not Inspected]
```

Select 'Next' to associate a form or forms to one or more of the Actions...

In this workflow there are Statuses and Actions at both the workflow and asset level. This is useful if you want to associate multiple assets with a Unity WO and need to trigger data collection forms for each of the assets on the WO, for example when carrying out asset inspections, as in this example.

# Associating an Action with a Form

## Asset Workflow

Work Order Workflow - In Progress  
Work Order Workflow - Return  
Work Order Workflow - Ad-hoc Inspection  
Work Order Workflow - Complete  
Work Order Workflow - Re-Progress  
Asset Workflow - Inspect  
Asset Workflow - Cannot Inspect

-- Please Select --

Action Name must be selected

Associate Form to Selected Action

-- Please Select --

Select an Action from the list that will trigger a specific form to be created on the mobile device...

... then select the form.

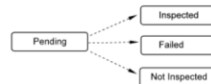
## testTrainFlow

You can create new forms and associate them to actions on the workflow you added. The forms will be triggered and shown on the mobile devices when technicians progress the work through the workflow.

## Work Order Workflow



## Asset Workflow



Choose Action

Work Order Workflow - In Progress

Associate Form to Selected Action

-- Please Select --

Add

(or)

Create New Form

## Forms

### Work Order Workflow

In Progress

TrainTestForm

Delete

Summarised here, we have associated the TrainTestForm with the In Progress action on the WO workflow. Different forms can be associated with different actions on the workflow

In this example we have chosen a form we have already created - but you can create a new form at this point instead – which opens the Form Manager screen

# Adding a New Workflow or Editing a Workflow

General > Map Service Layers > Basemaps > **Workflows** > Forms > Users > Publish

## Workflows

### Workflow(s) Overview

You can manage workflows associated to the app you are configuring. An app can have one or more workflows associated with it, each workflow name is represented as a work order type.

[Add Workflow](#) [Continue](#)

Workflow (Work Order Type) Title	
testTrainFlow	<a href="#">Edit</a> <a href="#">Delete</a>
Template	Asset Inspection

You can add a new workflow for the app (this means there will be two separate WO types for the app), or you can edit an existing workflow. Note, however, that you cannot delete a workflow from an app once it has been created.

# Configuring who has access to an app (non-integrated app)

General > Map Service Layers > Basemaps > Workflows > Forms > **Users** > Publish >

### User Config

Select user(s) to have access to the app Next

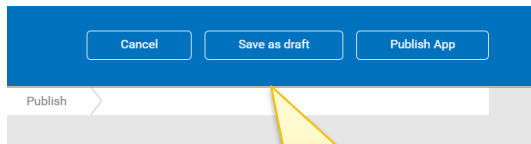
Each column can be sorted and filtered to allow for quicker setup.

[Select All](#) [Deselect All](#)

First Name	Last Name	Username	Organisational Unit(s)	Access
Boat	Administrator	trimble	Central Office,South District,North Dis...	✕
Tom	Rogers	trogers	Central Office,South District,North Dis...	✕
Tim	Triplett	ttriplett	Central Office,South District,North Dis...	✕
Tom	Walker	twalker	Central Office,South District,North Dis...	✓
Tom	Walker	twalker2	Central Office,South District,North Dis...	✕
Tyler	Bumbalough	tylerbumbalough	Central Office	✕
Unity	Diamond	udiamond	Central Office,South District,North Dis...	✕
Gary	St Clair	usa	Central Office	✕
UU	Crew	uucrew	Central Office,South District,North Dis...	✕

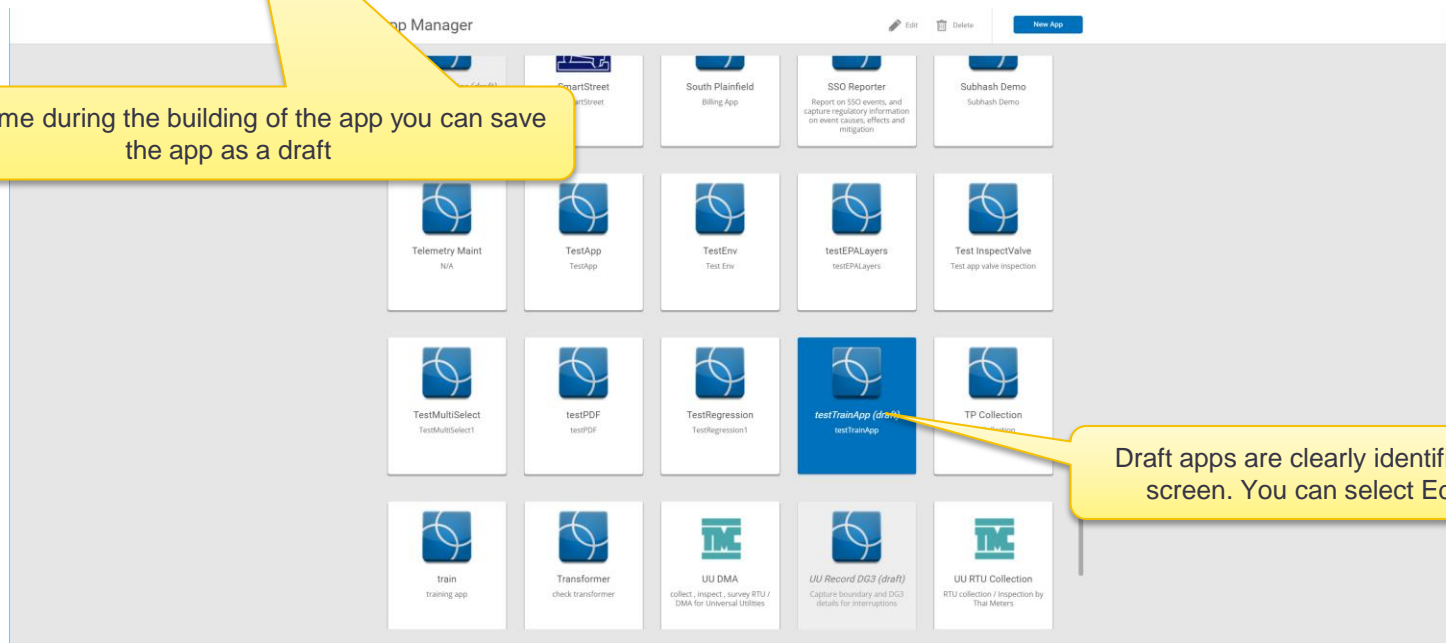
You can identify which users have access to an app.

# Saving a Draft App and Publishing an App



When you are happy with the app you can Publish it. Once an app has been published it will be downloaded to the mobile devices of any users who have been added as users for that app. The download will be triggered on the next sync after the app has been Published

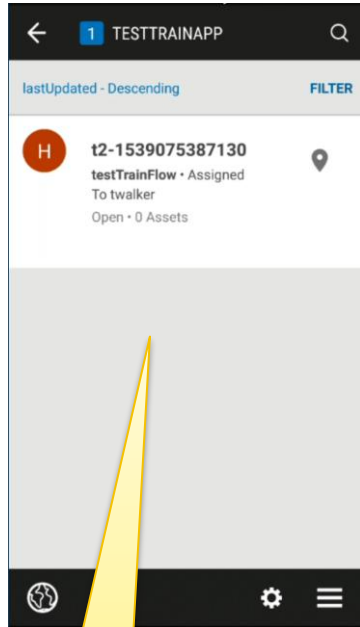
At anytime during the building of the app you can save the app as a draft



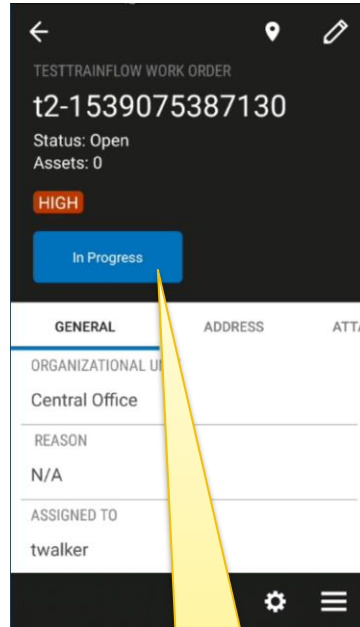
Draft apps are clearly identified in the App Manager screen. You can select Edit to update the app.



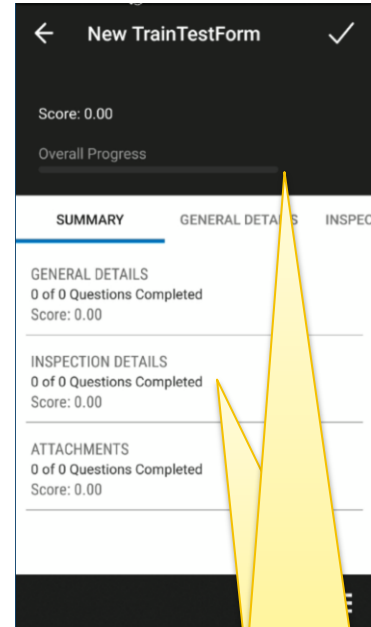
# Viewing the app on the mobile device



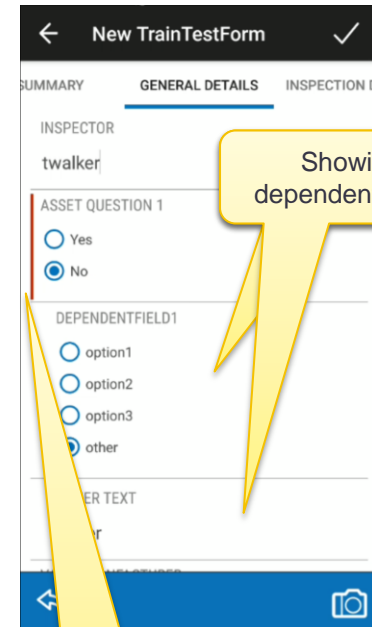
WO in WO List



WO Details:  
Select In  
Progress action  
to trigger form



Summary tab: With scoring  
enabled, the summary tab  
shows progress and scores/tab



Showing  
dependent fields

Scored field:  
Highlights colour  
code on side bar

# Viewing the app on the mobile device

← New TrainTestForm ✓

Score: 0.00

Overall Progress

SUMMARY GENERAL DETAILS INSPECTION DETAILS

GENERAL DETAILS  
1 of 1 Questions Completed  
Score: 0.00

INSPECTION DETAILS  
0 of 0 Questions Completed  
Score: 0.00

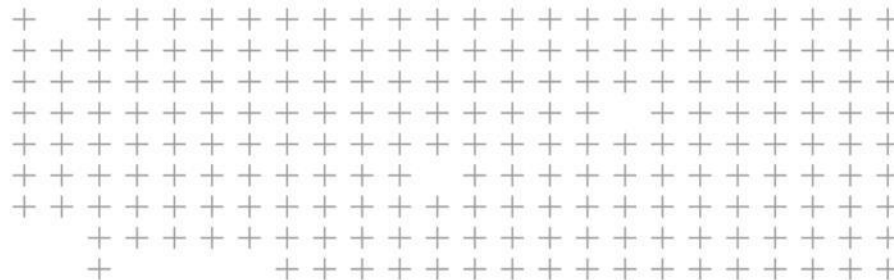
ATTACHMENTS  
0 of 0 Questions Completed  
Score: 0.00

⚙️ ☰

Summary tab  
has now been  
updated to show  
score for field

When scoring is  
enabled, the  
Overall  
Progress bar is  
showing and the  
overall score for  
the form is  
calculated

For each tab,  
the worst score  
across all fields  
on the tab is  
highlighted – to  
highlight specific  
areas of concern



# Managing Users

# Adding Users to Unity

. NOTE that the number of users that can be added is limited by the number of Unity licenses.

## User Admin

Admin > User Admin

190 out of 300 user licenses used

Edit Deactivate

Add User

Username	First name	Last name	Date created	Role(s)	Account status
Tarun	Tarun	Kumar	Jun 01 2018	Technician, Supervisor, Administrator	Active
tfield	Tom	Field	Oct 25 2013	Technician, Supervisor, Administrator	Active
tgillis	Thell	Gillis	Aug 31 2015	Technician, Supervisor	Active
TimP	Tim	Phillips	Oct 19 2016	Technician, Supervisor	Active
tmcrew	Thai Meter	Crew	Oct 27 2017	Technician	Active
tmcrew2	TM	Crew2	Mar 06 2018	Technician	Active
tmsuper	Thai Meter	Supervisor	Oct 27 2017	Technician, Supervisor	Active
tpuett	Tiffany	Puett	Aug 04 2015	Technician, Supervisor	Active
trimble	Boat	Administrator	Jul 17 2017	Technician, Supervisor, Administrator	Active
trogers	Tom	Rogers	Jul 17 2017	Technician, Supervisor, Administrator	Active
triplett	Tim	Triplett	Jul 27 2015	Technician, Supervisor, Administrator	Active
twalker	Tom	Walker	Nov 15 2013	Technician, Supervisor, Administrator	Active
twalker2	Tom	Walker	Apr 04 2016	Technician, Supervisor, Administrator	Active
tylerbumbalough	Tyler	Bumbalough	Mar 20 2018	Technician, Supervisor, Administrator	Active
udiamond	Unity	Diamond	Feb 12 2016	Technician, Supervisor, Administrator	Active
usa	Gary	St Clair	Jul 25 2016	Technician, Supervisor, Administrator	Active
uucrow	UU	Crew	Jun 06 2017	Technician	Active
uoffice	UU	Office	Jun 06 2017	Supervisor	Active
weber	Weber	Pires	Nov 21 2017	Technician, Supervisor, Administrator	Active
wherbst	Wilhelm	Herbst	Dec 07 2017	Technician, Supervisor, Administrator	Active
wmparker	Bill	Parker	Jul 25 2018	Technician, Supervisor, Administrator	Active
ygrow	York	Grow	Jul 23 2015	Technician, Supervisor, Administrator	Active
ysong	Yiman	Song	Dec 14 2016	Technician, Supervisor	Active

You can edit an existing user, deactivate an existing user (which will free up their license for use by another user), or add a user

# Adding Users to Unity

Provide a username – used to login

Provide First Name and Last Name

Optional department

Identify the Unity roles for that user, determines the access they will have:  
Technician, can login to mobile – but not web  
Supervisor, can login to web but not mobile,  
Administrator, can login to both mobile and web, and has access to the Admin functions.

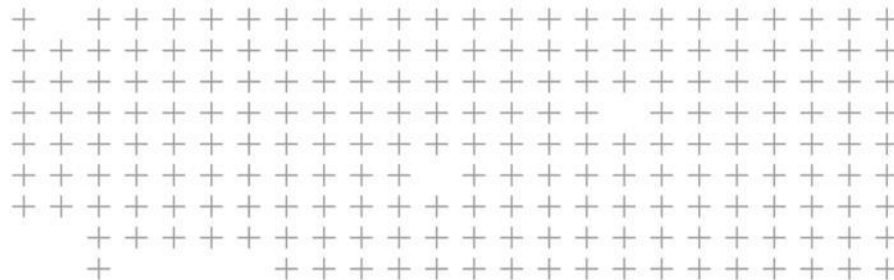
Provide and confirm password.

Identify which apps the user will have access to – determines which apps will appear on their mobile device/web app chooser screen

Identify which org unit the user belongs to – can add more than one if appropriate

The screenshot shows a web form titled "Add User" with a "Cancel" button and a "Save" button. The form contains the following fields:

- Username\***: A text input field for the user's login name.
- First name\***: A text input field for the user's first name.
- Last name\***: A text input field for the user's last name.
- Department**: A dropdown menu for selecting the user's department.
- Roles\***: A text input field for specifying the user's roles.
- Password\***: A text input field for the user's password.
- Confirm Password\***: A text input field for confirming the password.
- Applications**: A text input field for specifying which applications the user can access.
- Local Office\***: A dropdown menu for selecting the user's local office. A red error message "Local Office must be provided" is displayed below the dropdown. The dropdown list includes: Cavan, Donegal, Galway City, Galway County, Leitrim, Mayo, Monaghan, Roscommon, and Sligo.



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