

# Trimble Access

## Connected Workflows



Trimble

## Overview

This document provides comprehensive guidance on data management and visualization between Trimble Business Center (TBC), Trimble Connect, and Trimble Access, enabling users to efficiently transfer data from the office to the field and back.

The guide details the prerequisites and the process of moving data from a network drive or TBC to Trimble Connect for cloud-based management and collaboration. It also explains how to download data from Trimble Connect to Trimble Access for field operations, and then send newly captured data back from Trimble Access to Trimble Connect, ensuring that the necessary office users have access to the latest information. Finally, the guide covers data visualization using the new Field Data Extension for enhanced decision-making. Clear, step-by-step instructions, supported by examples and best practices, are provided to optimize workflow and data management.

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# Prerequisites

## Licensing

Trimble Access comes with a Trimble connect licence. You receive a Trimble connect business licence with Trimble access perpetual licence under software maintenance and a Trimble access Subscription. To use connected workflows with Trimble access you must have active software maintenance or subscription and be on the latest or second latest version of Trimble access.

How your Distributor can assign and activate licenses

With a Trimble Access Perpetual Licence	With a Trimble Access Subscription Licence
<ul style="list-style-type: none"> <li>- Obtain the serial number of device</li> <li>- Find that device in Virtual Warehouse</li> <li>- Update the customer name and email address for the device (This is assigning the connect licence administrator)</li> </ul>	Distributor - Assign subscription licence to TID, this is now the connect licence administrator

Connect licence admin then gets an email and has to assign licence to the user

Types of connect licences and what you can use them for

- No Trimble Connect subscription
  - The Surveyor in the field can work without a Connect Business License
  - Cannot create projects, but can be used by surveyors in the field to download design files from connect and upload finished fieldwork.
- Connect Business/ Business Premium subscription
  - Required by the person managing the project in the office.
  - Needed to create projects and upload and manage designs and invite team members
  - Needed for Connect Property Set / BIM Organiser workflows

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## Creating a Project

A user with a Trimble connect business or business premium license will complete this part of the workflow

### Signing In

Go to [Trimble Connect Web portal](#) and select <LOG IN>

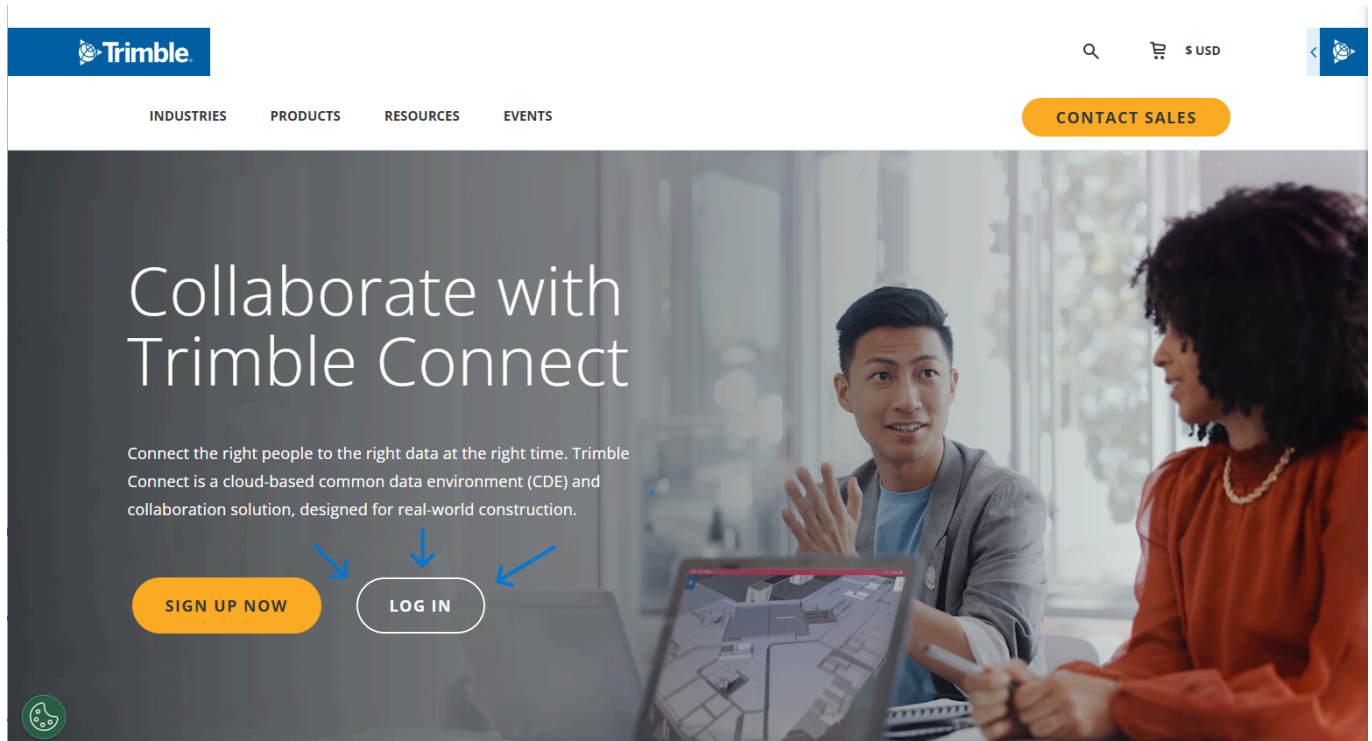


Figure 1: Trimble Connect Web Portal.

Either enter your email address that you use to sign into Trimble, or select to create a New Trimble ID if you have not previously signed into Trimble.

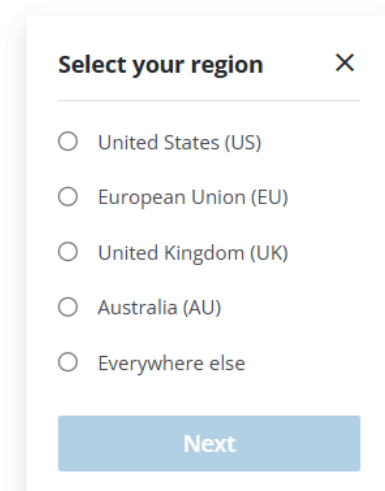
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To create a Trimble Identity, select your region as well as your first and last name and email address.

## Sign In

New user? [Create a Trimble ID](#)



**Select your region** X

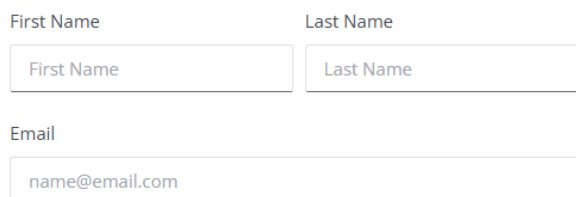
- ☐ United States (US)
- ☐ European Union (EU)
- ☐ United Kingdom (UK)
- ☐ Australia (AU)
- ☐ Everywhere else

**Next**

Figure 2: Region Selection.

## Create a Trimble ID

Already have an account? [Sign in](#)



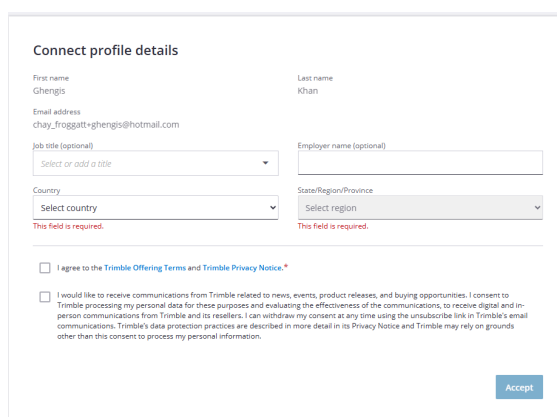
First Name Last Name

First Name Last Name

Email

name@email.com

Figure 3: Trimble ID Creation.



**Connect profile details**

First name: Ghengis Last name: Khan

Email address: chay\_froggatt+ghengis@hotmail.com

Job title (optional): Select or add a title

Employer name (optional):

Country: Select country This field is required.

State/Region/Province: Select region This field is required.

☐ I agree to the [Trimble Offering Terms](#) and [Trimble Privacy Notice](#).

☐ I would like to receive communications from Trimble related to news, events, product releases, and buying opportunities. I consent to Trimble processing my personal data for these purposes and evaluating the effectiveness of the communications, to receive digital and in-person communications from Trimble and its resellers. I can withdraw my consent at any time using the unsubscribe link in Trimble's email communications. Trimble's data protection practices are described in more detail in its Privacy Notice and Trimble may rely on grounds other than this consent to process my personal information.

**Accept**

Figure 4: Trimble ID Profile Details.

Go to the Trimble Connect Login portal and enter your Trimble Identity.

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## Create a Project

1. Navigate to Trimble Connect and select the blue “New” button and fill in the required field.

**New Project** ×

Please enter the following details for the new project

Name  
Enter Name

Project thumbnail  
Upload new

Choose project server location  
North America

Project ownership  
austin\_allchurch | TRMB

Project license  
TBC-MOM-NR | TBC-MOM-NR

[More options](#)

Cancel Submit

Table 1: Required Fields for Project Creation.

Required Fields	
Name	Desired name for the project
Server Location	Region where the server location is
*Ownership	Select the account that will own the project.
Project License	If multiple licenses exist select any

Figure 5: Project Creation UI.

\*Project Ownership: Ideally the person creating the project will only have one Trimble Account. DO NOT use the “Trimble Connect for Free” option. If there is more than one in the list, try to be consistent.

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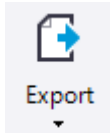
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## Office to the Cloud

Having all the prerequisites finished, one can now open up their Trimble Business Center and export their desired data to the cloud. If the data and/or designs is stored locally, this can be accomplished using the drag and drop functionality.

### Adding Data to Connect from TBC

1. Navigate to the export button.



2. Select the desired file format.
3. Click remote Save **Remote Save**.
4. Sign in using your Trimble Identity.

After the TBC workflow has been completed, the option to select the desired Trimble connect project, or create a new one will be present.

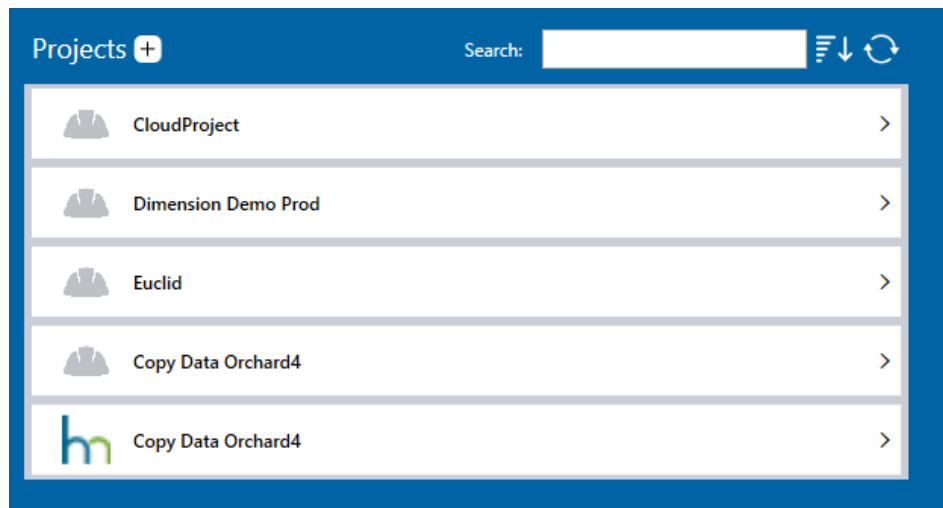


Figure 6: Trimble Connect Projects.

Navigate to the desired project and press save to save the design file to the cloud.

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## Adding Data to Connect from Local Directory

1. Dragging and dropping files onto the file explorer window.



Figure 7: Dragging and dropping files into Trimble Connect

2. Using the blue “add” button from the top right of the file explorer window and selecting upload files.

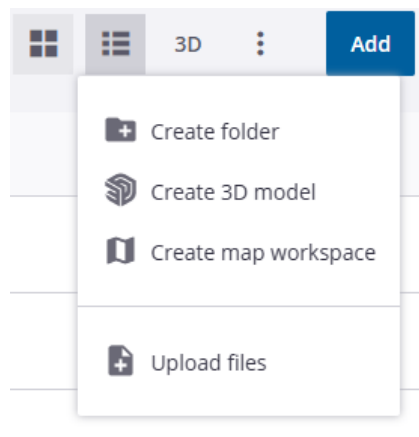


Figure 8: Project Creation UI.

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# Cloud Management

Now that all of the data and/or designs have been published to the cloud, it is now time to organize the folder structure, control the users that have access to the project, enable permissions for users to access files and create groups.

## File Management

1. Create folders by navigating the blue “add” button in the project explorer and selecting create folder.

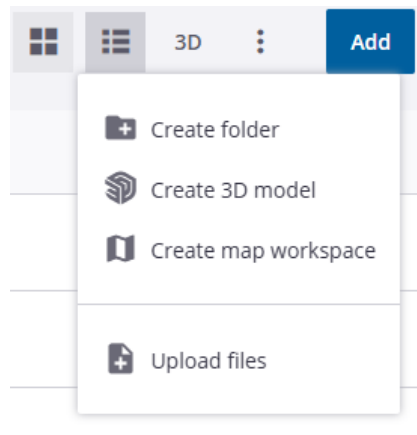


Figure 9: Add Button in File Explorer.

2. Drag and drop the files in the file explorer into the desired folders.
3. Download files from the file explorer by hovering over the file icon, selecting the check box and pressing the download button.

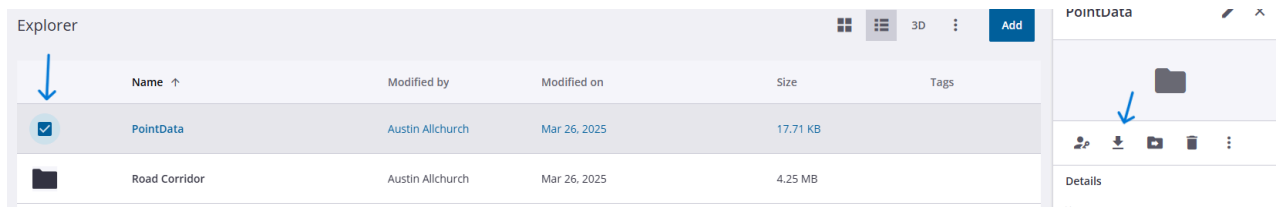


Figure 10: Downloading Connect Files and Folders.

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## Users

1. Manage the users that have access to the Trimble Connect project using the “Team” section within the Trimble Connect directory.

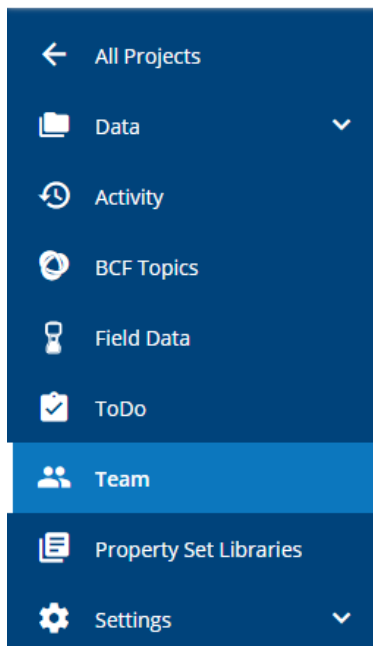


Figure 11: Trimble Connect Team Directory.

2. In the top right corner, select “invite people to project”.

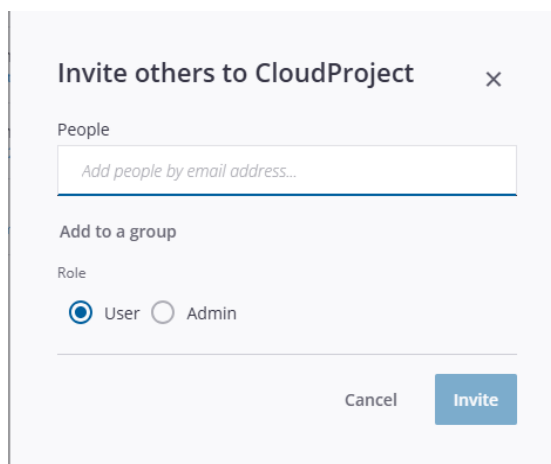


Figure 12: UI to Invite Users.

3. Enter the desired user's username to invite them to the project.

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## Groups

We can also organise users into groups to easily manage different groups of users.

1. To create a group, go to the team icon in the Trimble Connect directory and select “New Group”.

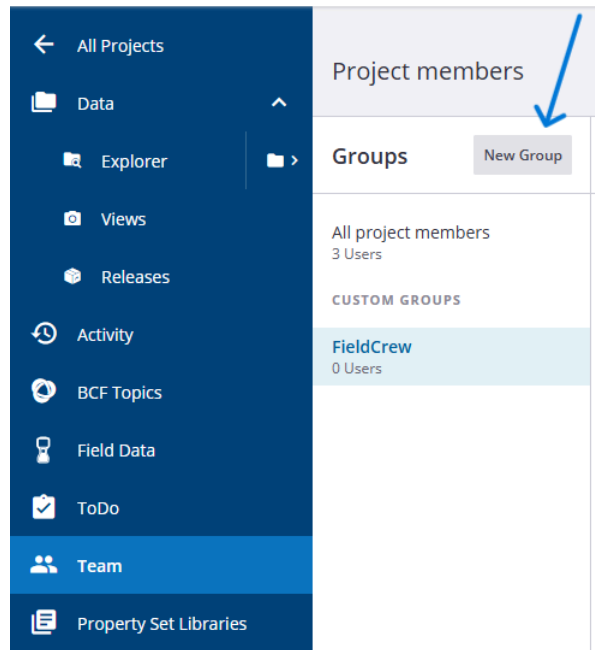


Figure 13: Group Creation Button.

2. Create the name of the group and select the group name in the custom groups list.
3. Once inside of the group, select “Add people to group” and add the desired users to the group.

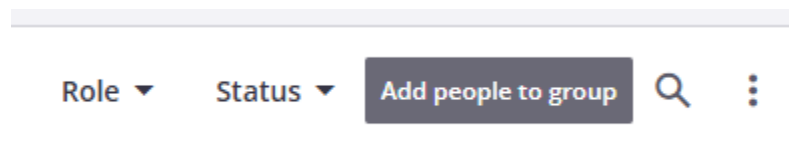


Figure 14: Button to add People to a Group.

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## Permissions

1. To control what users or groups can see files and folders within a Trimble Connect project, go to the file explorer and select the file where the permissions are to be changed and select the permissions icon.

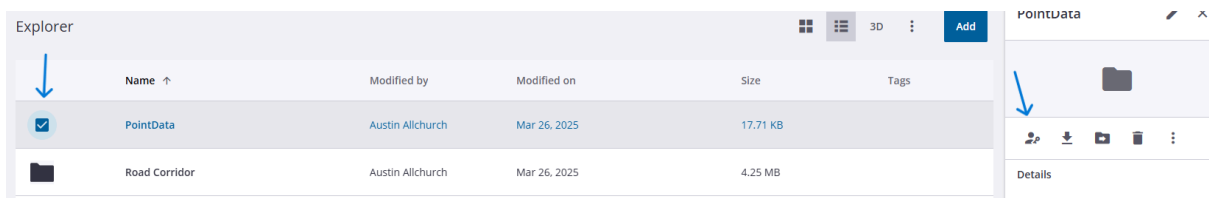


Figure 15: File Permissions Button Location.

2. Enter the user's name to specify what permissions they will have.

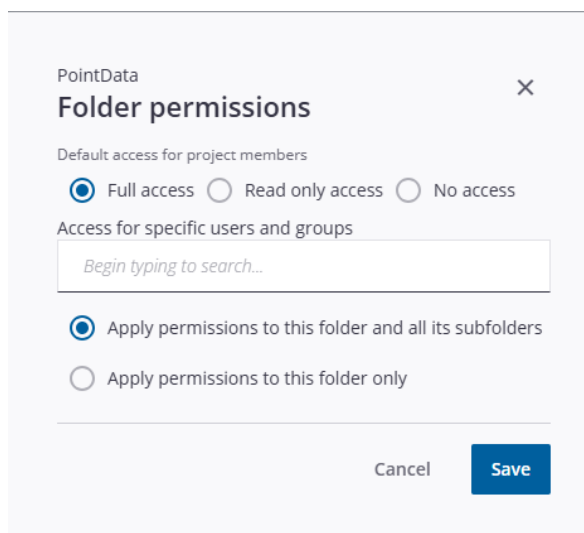


Figure 16: Folder Permissions UI.

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## Tags

1. To add tags to folders or files navigate to the project within Trimble Connect and select Settings then tags.

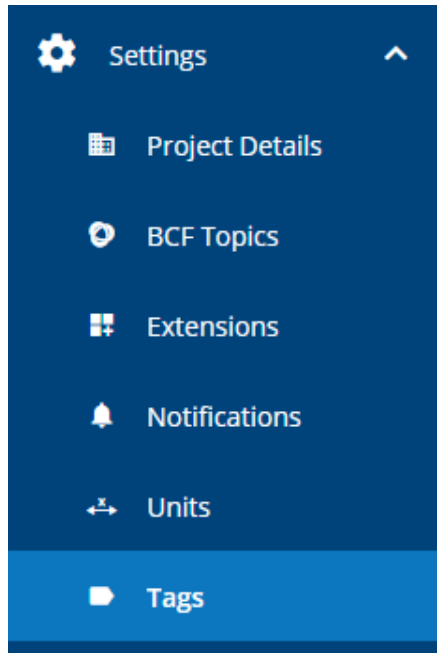


Figure 17: Trimble Connect Tags Directory.

2. Use the tag manager to add custom tags to the project.

### Tag Manager

Define a set of tags which can be used by project members.

#### Add custom tags

Add

Figure 18: Tag Manager UI.

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## Cloud to the Field

Once everything has been sorted in the cloud, it is now time for the field crew to access whatever design or data that they may need. Within this section, one can find the process to download the project data from the cloud down to Trimble Access, as well as loading the data into the layer manager within a job.

### Downloading Project Data

1. Begin by signing into Trimble Access using your valid Trimble Identity, once signed in the icon will change from gray to yellow.



Figure 19: Trimble Identity Login Verification.

2. Find the desired cloud project that you would like to use and press the download button.

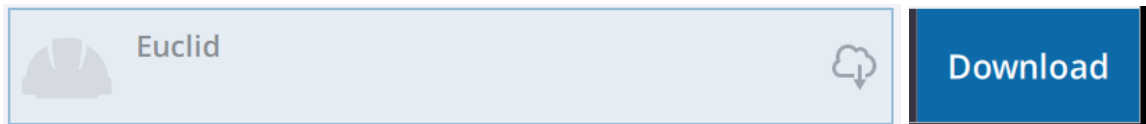


Figure 20: Trimble Connect Team Directory.

3. Once the project data has been downloaded, create a job within the project, navigate to the layer manager and select the add button.

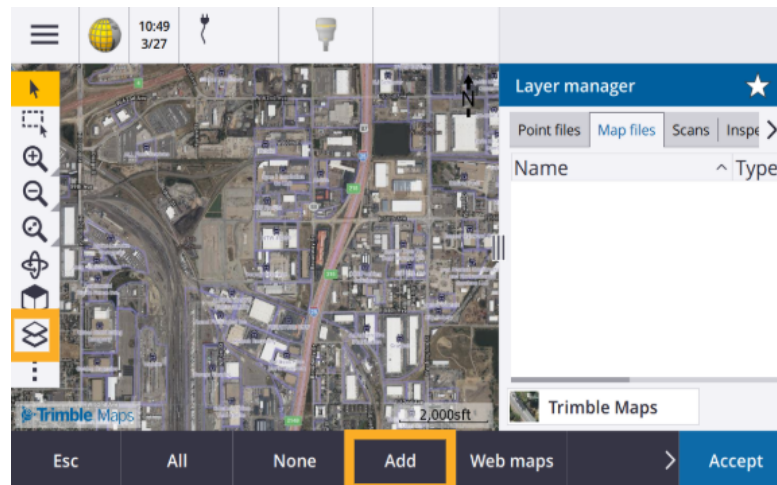


Figure 21: Trimble Access Layer Manager and Add Data

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Click on Trimble Connect in the folder structure, find the desired file to download and link to the current job and select accept.

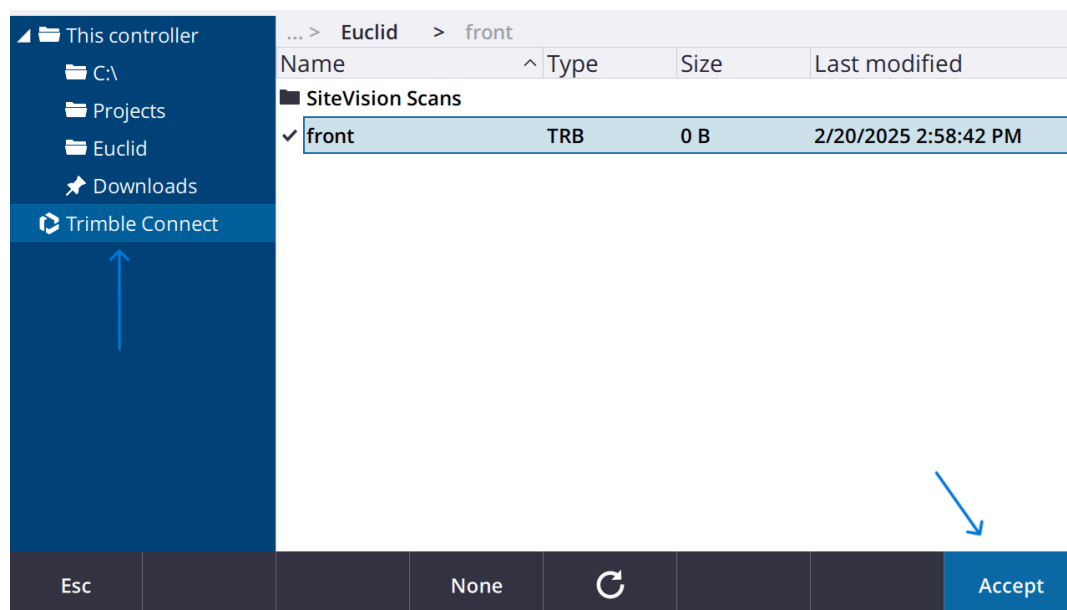


Figure 22: Trimble Access Folder Structure.

## Field Updates

1. If a file from Connect that is being used by a job is deleted, the user will be notified that the file has been removed prior to the syncing the job.

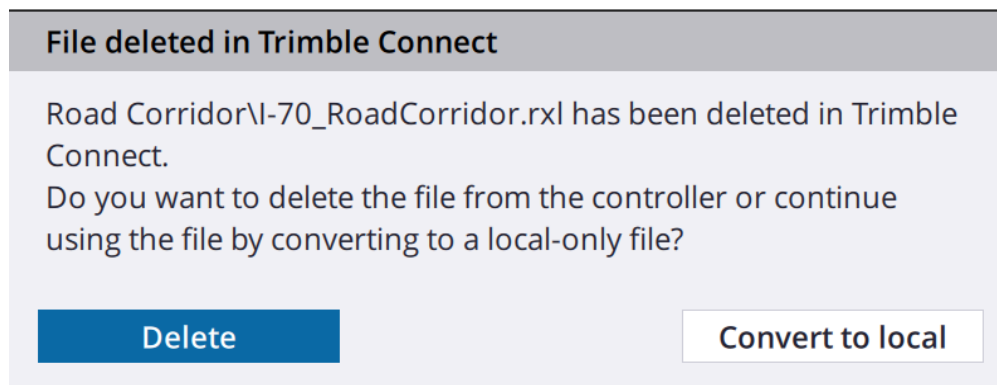


Figure 23: File Deleted Notification.

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2. If a file from Connect that is being used by a job is modified, the user will be notified to update to the latest version.

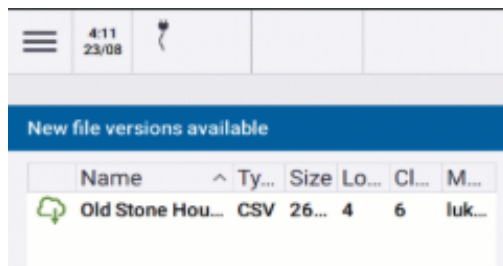


Figure 24: File Modification Notification

## Field to the Cloud

Upon completion of fieldwork, it is now time for the fieldcrew to send their job data back up into the cloud. Within this section, it will cover the workflow of sending job data from Trimble Access back up into Trimble Connect.

### Uploading Job Data

1. Navigate to the project directory within Trimble Access and change the status of the modified job from either "New" or "In Progress" to "Fieldwork Complete".

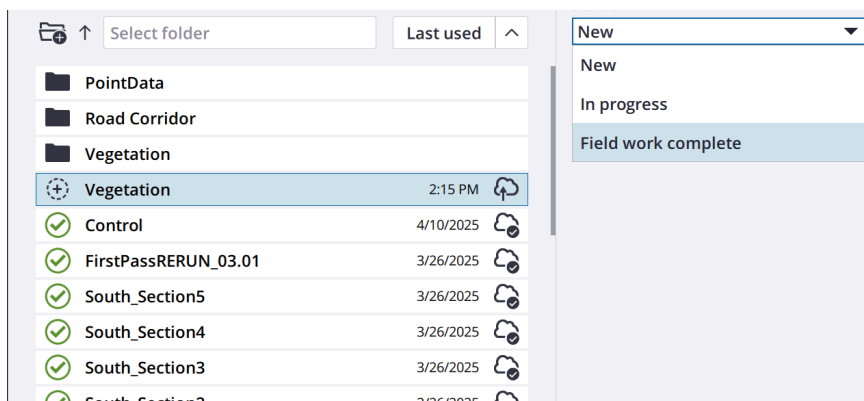




Figure 25: Trimble Access Job Status.

2. After this is triggered, the cloud icon associated with the job will go through three stages.

**Upload:**  There have been changes to a job that is different from the version in the cloud  
- You can also tap on this symbol to trigger a job upload.

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**Syncing:**  Pushing the changed job from Trimble Access to Trimble Connect.

**Synced:**  The job file in Trimble Connect and Trimble Access are the same.

Figure 26: Trimble Access Job Upload Stages.

## Assigning Tags and Users to a Job

1. To add tags to a job in Trimble Access, go to the project directory, select the job, and press the “+” icon next to tags. Similarly, to add assignees to a job follow the same procedure and press the “+” icon next to assignees.

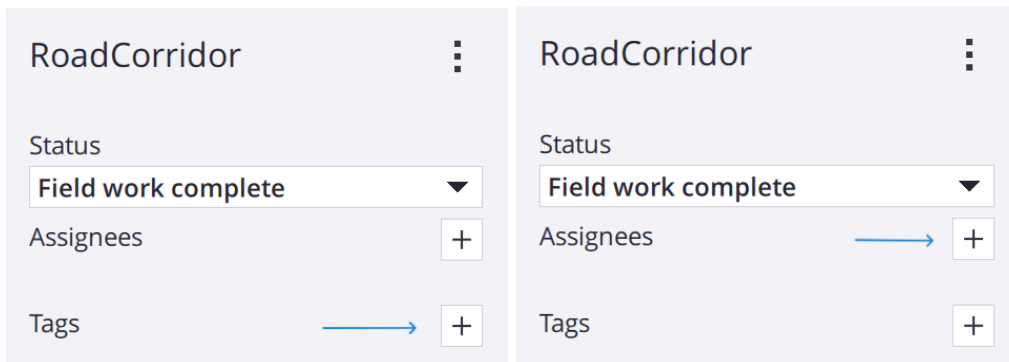


Figure 27: Trimble Access Job Tags and Assignees Button.

## Cloud Settings

1. To find the cloud settings for Trimble Access, click the cloud settings icon.

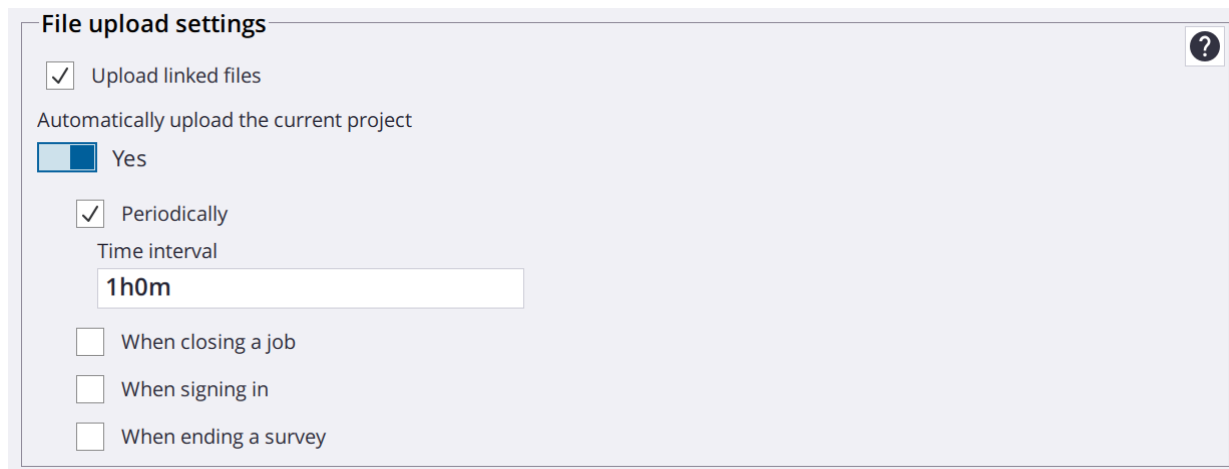


Figure 28: Cloud Settings Icon.

2. In the cloud settings, one can enable the “Automatically upload the current project” feature where you can control if its done periodically or when certain events are triggered.

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**File upload settings** ?

☒ Upload linked files

Automatically upload the current project

☒ Yes

☒ Periodically

Time interval

1h0m

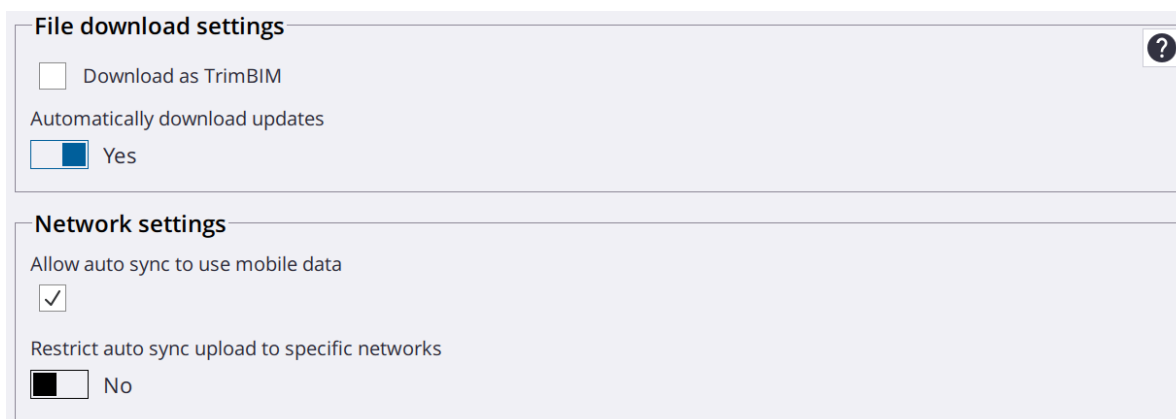
☐ When closing a job

☐ When signing in

☐ When ending a survey

Figure 29: File Upload Settings.

3. It is also possible to control the file download settings and the network settings in the same cloud settings location.



**File download settings** ?

☐ Download as TrimBIM

Automatically download updates

☒ Yes

**Network settings**

Allow auto sync to use mobile data

☒

Restrict auto sync upload to specific networks

☐ No

Figure 30: File Download and Network Settings.

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## Field Data Extension

With all data being fully transferred through the whole cloud workflow, it can then be checked, verified and downloaded using the Field Data Extension.

### Enabling the FDE

1. Go to Trimble Connect web interface and navigate to the settings pane and select "Extensions".

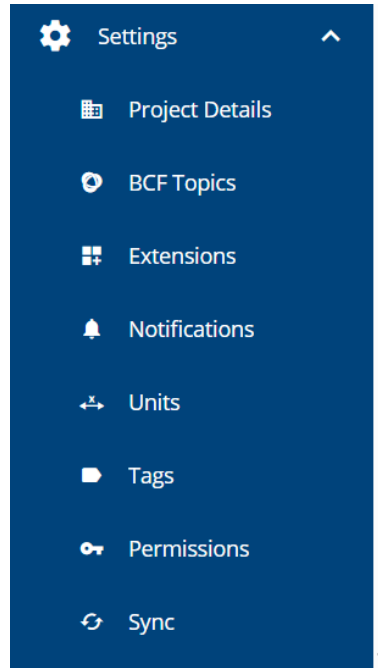


Figure 31: Trimble Connect Extensions.

2. Locate the Field Data extension and toggle the switch on.

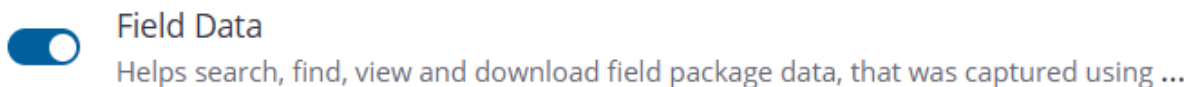


Figure 31: Field Data Extension Toggle.

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3. The FDE should then be visible in the Trimble connect directory as seen below.

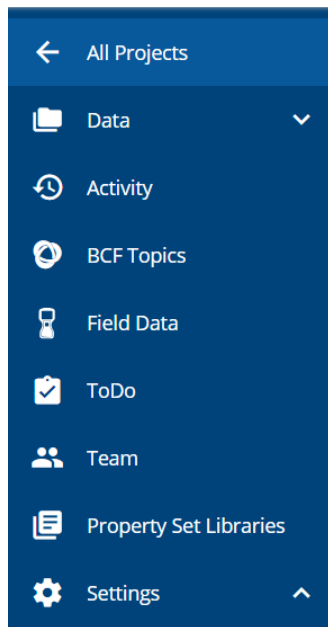


Figure 32: Trimble Connect  
Field Data Extension.

## Visualization

1. Find and locate job data in the FDE using the locate icon.



Figure 33: Job UI within Field Data Extension.

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2. Highlight data within a job by double clicking any point on the map.

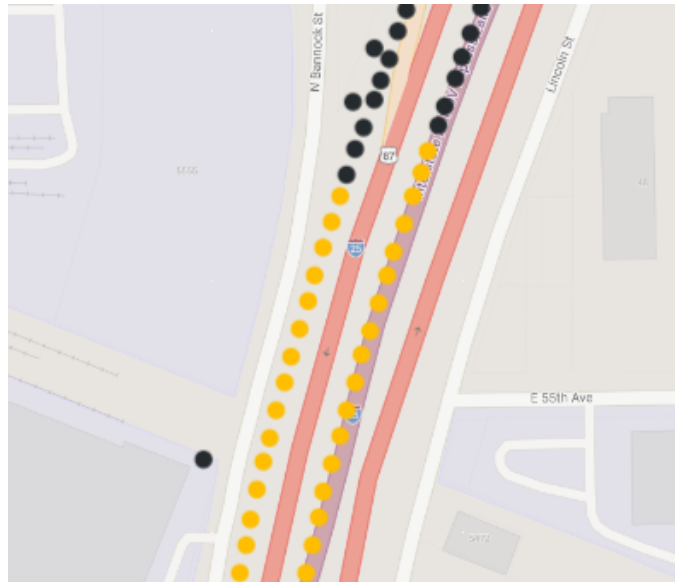


Figure 34: Field Data Extension Job Highlight.

3. Single click any point on the map to bring up the attributes.

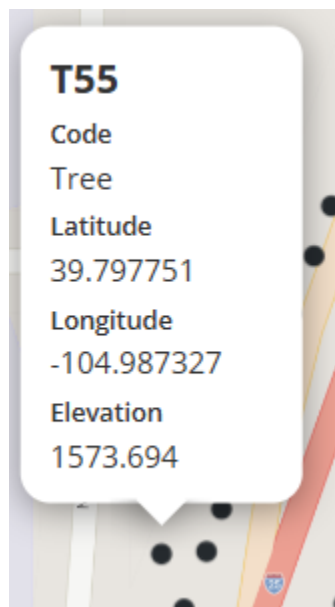


Figure 35: Point Attributes.

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## Job Properties

1. Select a job to open the jobs properties.



Figure 36: Job Selection in the Field Data Extension.

2. View the jobs status, properties, tags, feature code library and other attributes.

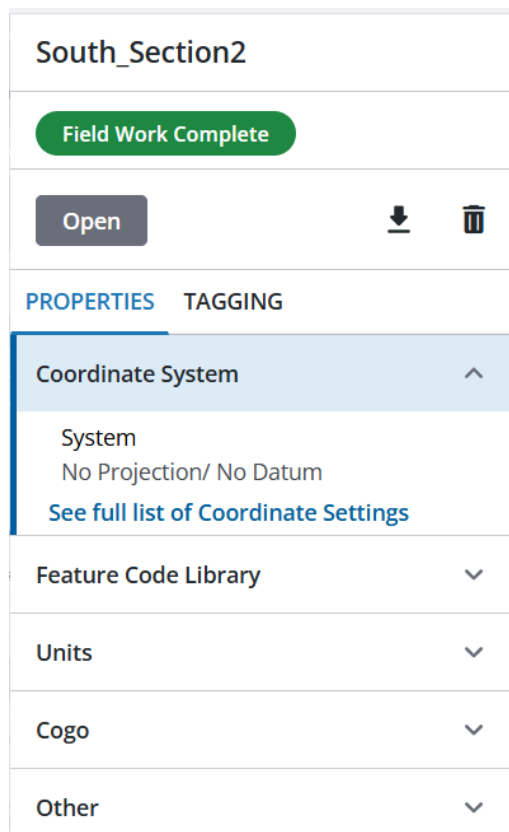


Figure 37: Job Properties.

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3. Select the open button in the figure above to bring up the review job page with the map view, reports and point list.

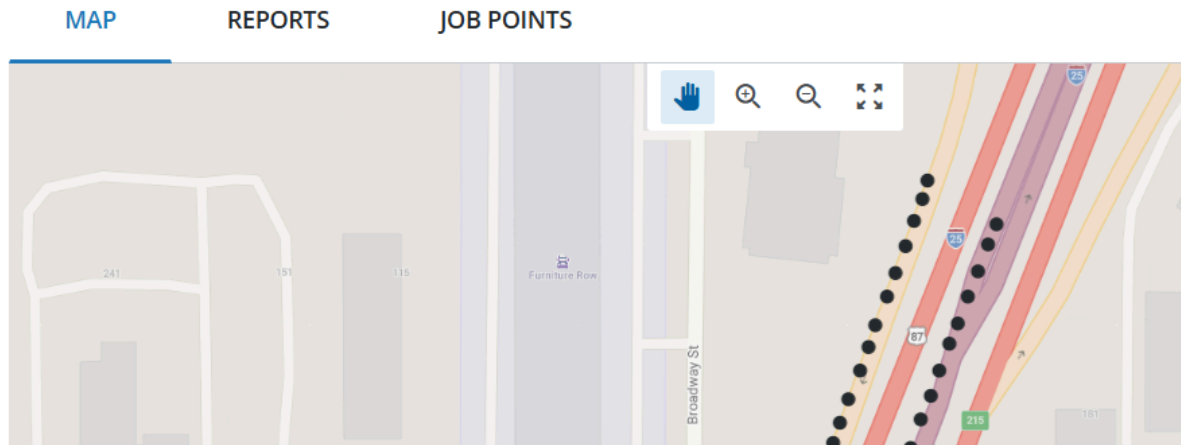


Figure 38: Job Review Functionality.

## Sort and Filter

To help you find jobs use the filter and search function.

1. In the Field Data Extension, change from the map view to the list view.



Figure 39: Map and List View.

2. Above each column; Task Name, Status, Creator, Assignee, Modified On and Tags, each field can be sorted in alphabetical order.

<input type="checkbox"/>	Task Name	↑↓	Status	↑↓	Creator	↑↓	Assignee	Modified On	↓↑	Tags
--------------------------	-----------	----	--------	----	---------	----	----------	-------------	----	------

Figure 40: List View Job Attributes.

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3. To filter all of the jobs, we can apply specific filters such as “Has the words”, “Status” and others to find distinct jobs.

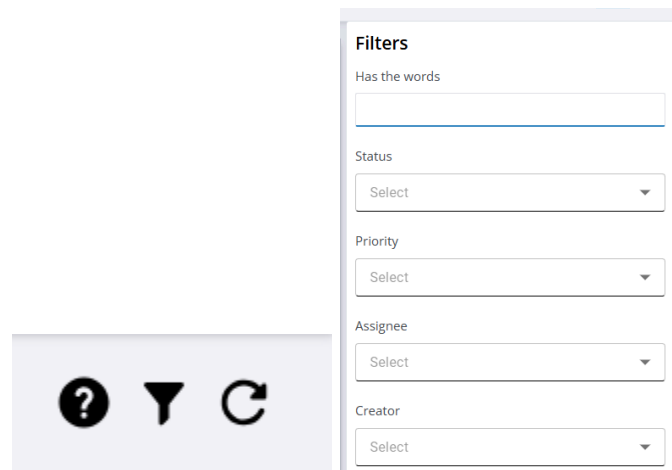


Figure 41: Trimble Connect Filter Functionality.

## Download

1. While doing quality assurance checks for a given job, navigate to the job properties and check the reports, points, map view and the job properties.
  - a. Select the Job.
  - b. Press Open.



Figure 42: Open a Job in the Field Data Extension.

2. Download the job and its linked files by selecting the large grey button.



Figure 43: Downloading Button Icon.

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- Alternatively, go to the Field Data Extension in the list or map view and select the job that you would like to download.



Figure 44: Download Button Alternative.

- Lastly, if multiple jobs are to be downloaded, select multiple jobs and press the download all button.

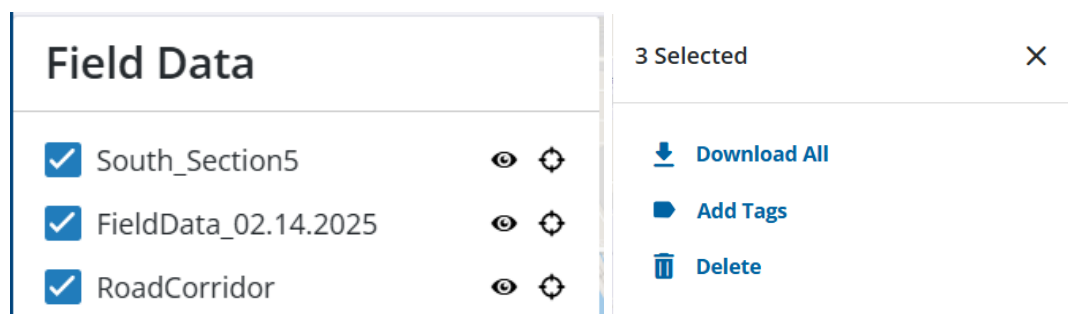


Figure 46: Group Download Jobs.

## Cloud to TBC

The last section of the connected workflow is bringing the cloud data back into TBC for post processing. Within this section the workflow to import job data can be found.

### Importing Jobs to TBC

- Validate that the necessary jobs can be found within the Field Data Extension inside of the Trimble Connect Web application.

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2. Open TBC and select the “Connected Workspace” button.

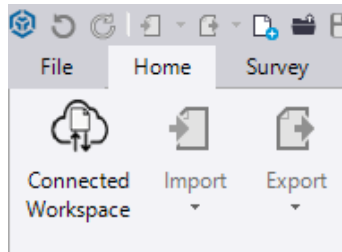


Figure 46: TBC Connected Workspace.

3. Navigate to the desired Connect project, select the job that you would like to import and press the import button.

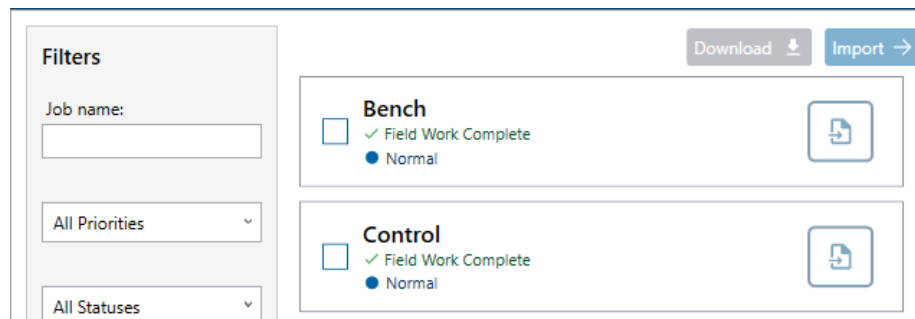


Figure 47: Connected Workspace File and Job Directory.

## Additional Considerations

### Trimble Identity Federation

- **Trimble<sup>®</sup> Identity**, or TID, is a way for users to log in to all things Trimble.
- Managing multiple logins across different platforms and applications can be a cumbersome task for administrators and users. For organizations with their own domain, this is where federation with Trimble Identity (TID) comes into play.
- By federating your organization's identity provider (IdP) with Trimble Identity, you can streamline the login process for your users, ensuring a seamless and secure experience across Trimble applications.

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