SEILER
GEOSPATIAL DIVISION

Survey Technical Support Notes   March 2016
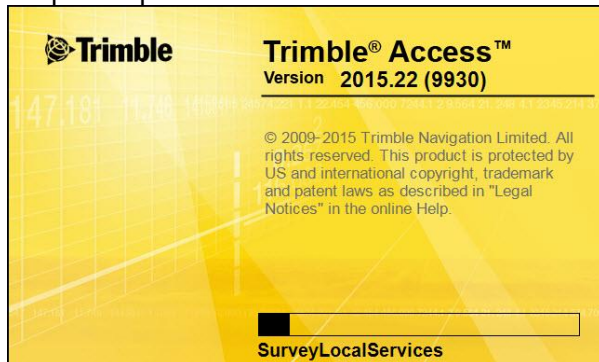
Trimble Access Creating Templates

Overview: This document explains how to create and use templates in Trimble Access. Template will speedup job creation in Trimble Access
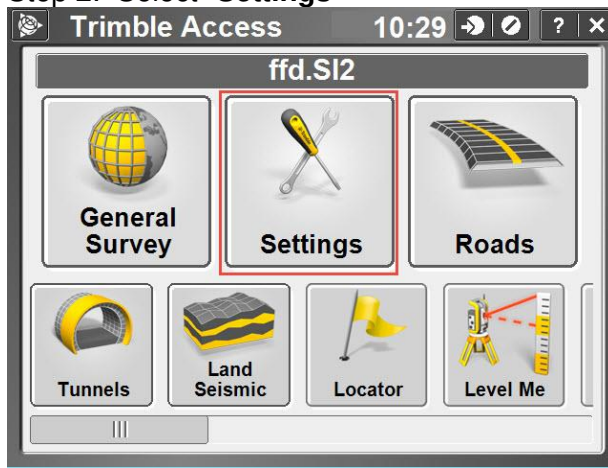
Equipment: Trimble Access version 2015.22

Results: User will be able to create a template in Trimble Access and when creating a new job use the template and convert a "Job File" to a template.
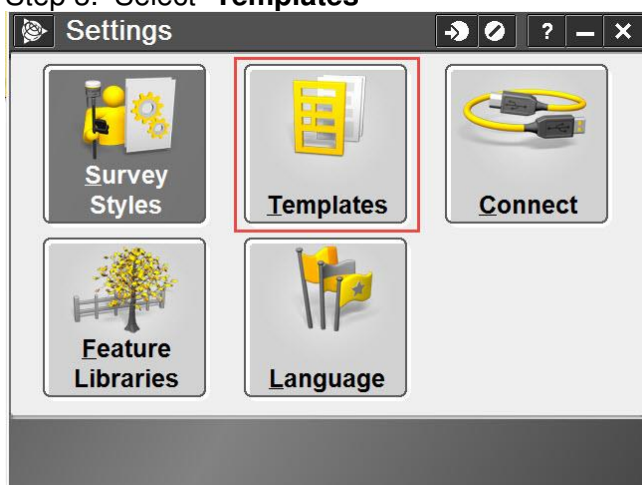
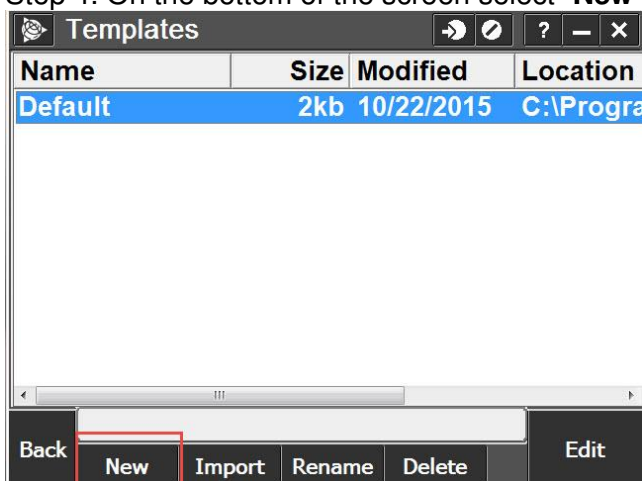**Procedure:**

Step 1. Open Trimble Access on collector

Step 2. Select "**Settings**"

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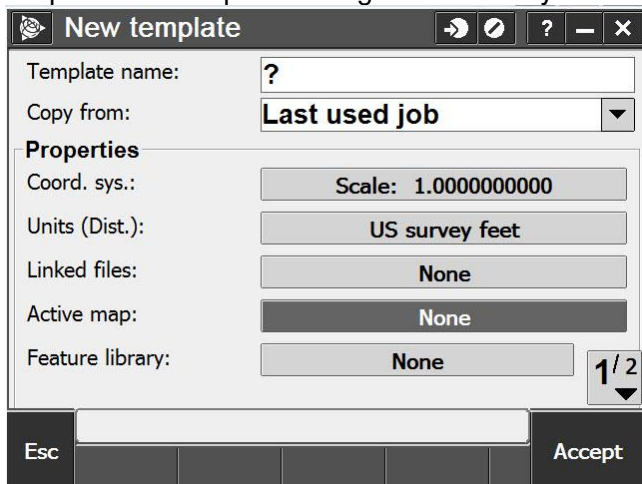Web: http://solutions.seilerinst.com

Step 3. Select "**Templates**"

Step 4. On the bottom of the screen select "**New**"

Step 5. The Template dialogue box is very similar to creating a new job.

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Step 6. Name the template, you can "**Copy from**" an existing template if you have one that is similar to the one you wish to create. For example, if an existing template is set to the correct coordinate system and just the geoid model needs to be changed.

In this example we will be changing the coordinate system. You can make any changes in the Template that you would when starting a new job.

Step 7. Tap on "**Scale:1.00000000**" and then select "**Select from library**"

Step 8. Select the correct coordinate system, zone and geoid model from the list and then tap "**Store**" this will take you back to the create template dialogue

Step 9. You will notice that the template name matches the coordinate system. You could also change "**Units**", "**Linked files**", "**Active Map**" "**Feature library**", and where" **Media files**" are stored. This would be beneficial for large project sites where there was base drawing information and control files that you always want to have associated when creating a new project.

Step 10. Accept the changes then exit to Trimble Access screen. In "**General Survey**" go to "**Jobs**" and create a new job

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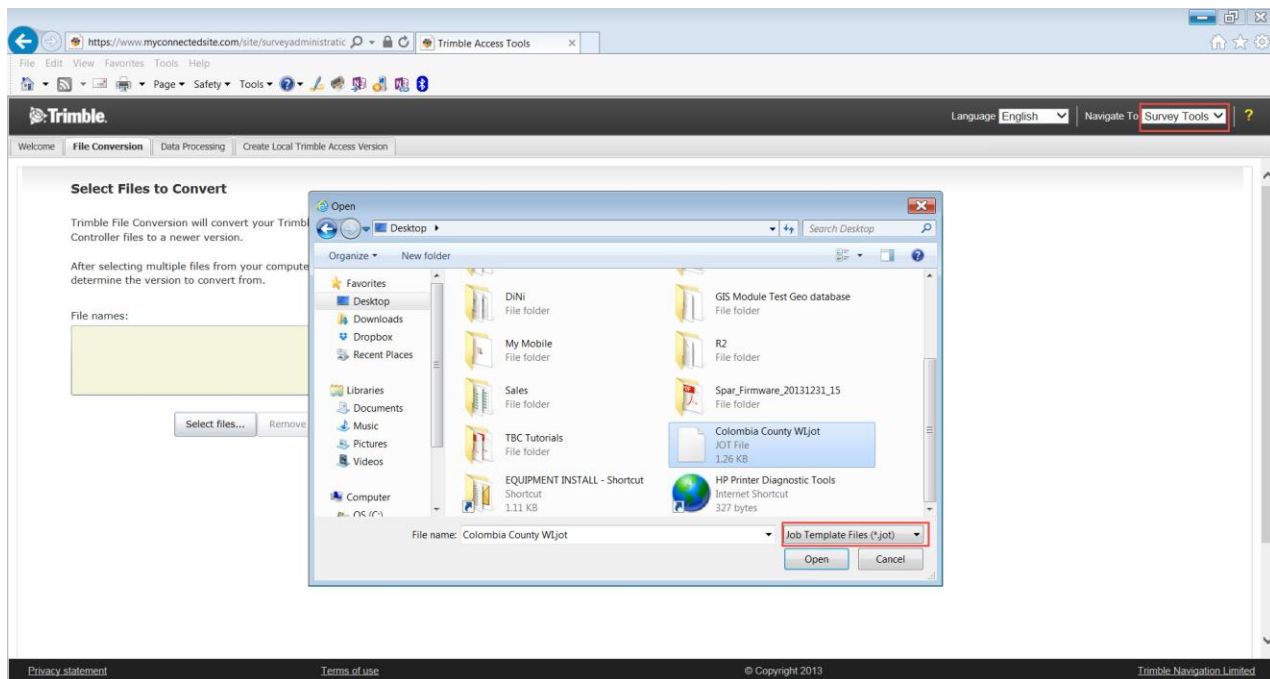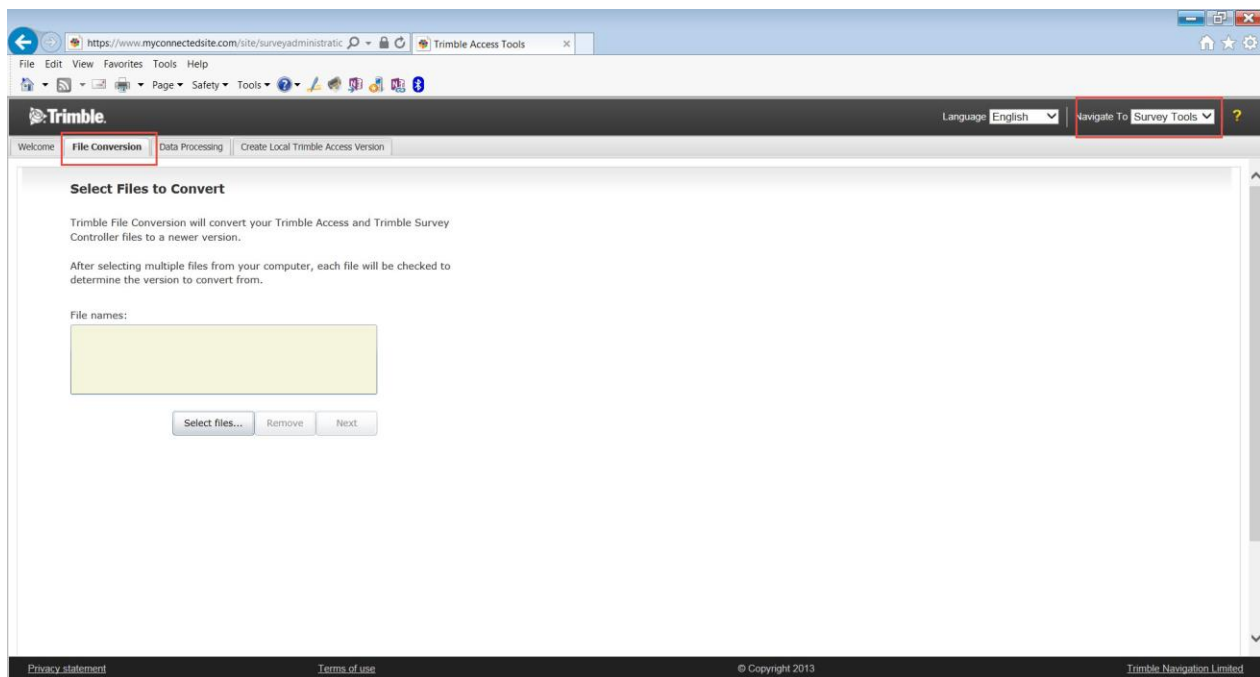Web: http://solutions.seilerinst.com

Step 11. After naming the new job select "**Templates**". You will notice that there is a "**Default**", "**Last used job**" and the template that was just created. The "**Last used job**" will use the template of the project that is currently opened.
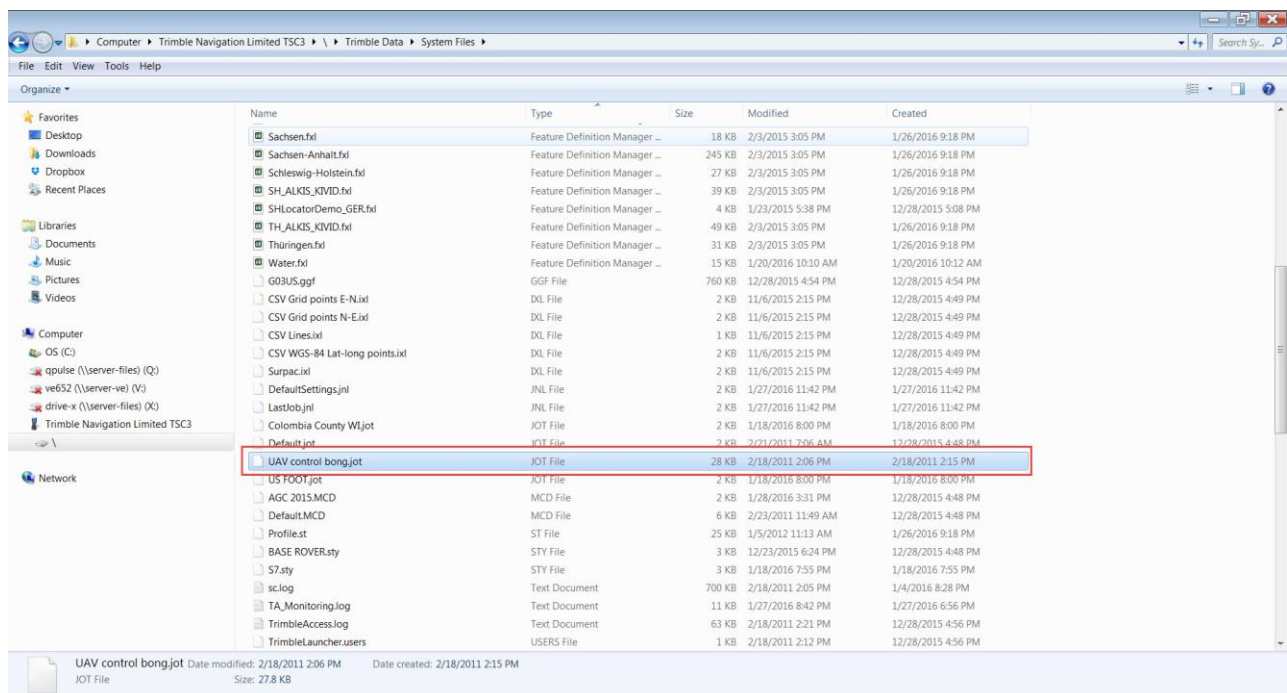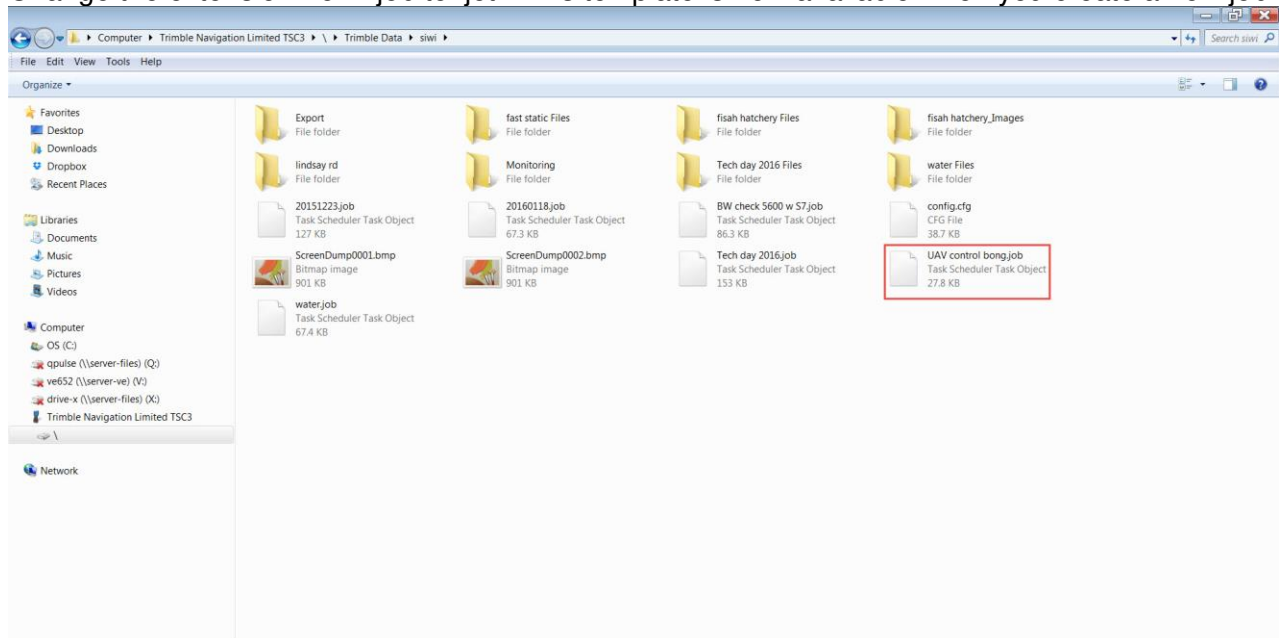

Step 12. After selecting the newly created template, you will notice the "**Coordinate System**" has been updated. If there were any changes in Units, Linked Files, Active Map, or Features, they would also be reflected in this screen.

Step 13. Templates are saved in the "**Trimble Data/System Files**" folder. Templates can be copied from one collector to another if the versions of Trimble Access are the same. My Trimble Access can be used to convert a template to the latest version.

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Step 14. If you have a job file with a calibration, linked files, feature code list, etc it can be converted to a template. Copy the "**Job File**" (.job) and paste it into the "**System Files**" folder. Change the extension from .job to .jot. This template is now available when you create a new job.

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