Edge® App User Guide

V 4.6

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Introduction

TerraGo Edge is a field data collection and geospatial collaboration solution that enables field workers to collect field data from a mobile device and synchronize location notes with the headquarters, sharing and collaborating the field information across the enterprise in real time. Here are some great features of TerraGo Edge:

- Custom forms for any industry, organization, or workflow
- Leverage online map services such as OpenStreetMaps, Google and Bing
- Real-time home screen to monitor field operations
- Dynamic notebooks for real-time syncing and sharing

Trial Version

You can now try all the advanced features of TerraGo Edge as a free user with limitations in just sharing and syncing data with the server.

If you like the product and decide to buy the Edge license, all you need to do is purchase one online and enter the Product Key to activate the fully functional version. You do not need to uninstall the trial version or install anything extra. Once you activate your license, all your data that you created in the device as a free user will be synced with the server and updated with the username that you use after the product license activation.

Note: Once you activate your license, you will not be able to login in as a free user then.

1. Once you install the TerraGo Edge application from the Apple Store or Play Store, the application opens displaying the Login screen.
2. Press the **USE FOR FREE** button.

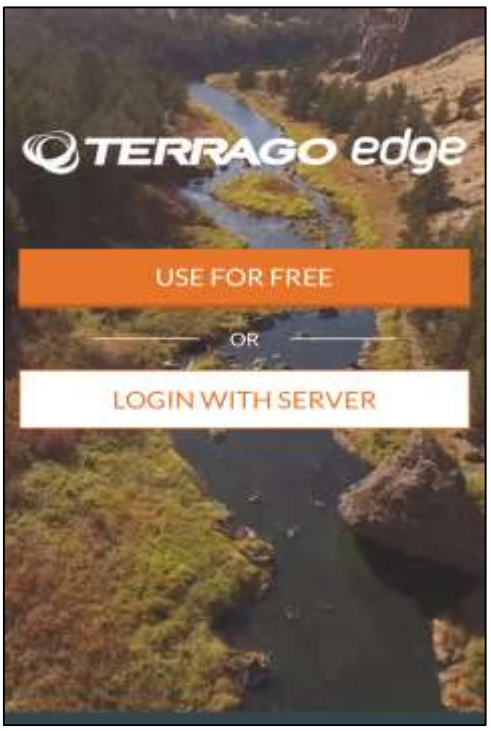


Figure 1: Free User Login

3. Enter your email address and press the **GET STARTED** button. The notes

   Note: To continue without entering the email address, press **Skip** on the top right corner of the screen.

Figure 2: Email address

4. The **Map** view of the **Notes** opens as shown below displaying a pointer at your current location:

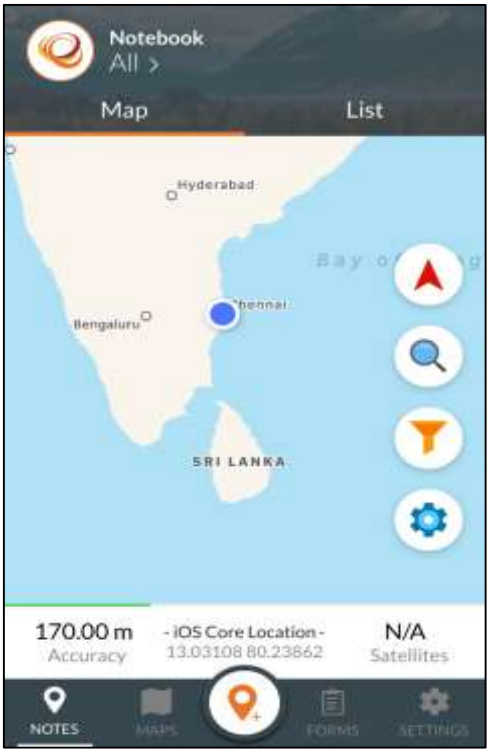


Figure 3: Edge

Logging In

A license key is sent to the email address that you registered for each device that you add. You will also receive a separate mail with the account and password details.

1. Once you install the TerraGo Edge application from the App Store, the application opens displaying the Login screen.
2. Enter the server address, username, and password given in the Account Details mail.
3. Enter the authorization code generated for the device.

-or-

4. To launch the application the first time after installation, tap on the **license.lic** file attached in the email and open with TerraGo Edge. The application now opens displaying the Login screen with the server details, user name, password, and authorization code autopopulated.

Figure 4: License Mail

5. Enter the password given in the Account Password Details mail that you received.
6. Press the **LOGIN** button to continue. The **Map** view of the **Notes** opens displaying a pointer at your current location.

Figure 5: Login Screen

1. Home

1. Once you log in, by default, the screen displays the map view of all the notes and a pointer icon is displayed at your current location.
2. The action bar at the bottom of the screen displays the Notes, Maps, Forms, and Settings tabs with the Quick Launch icon at the center.

Figure 6: Notes Map View

3. Press the Quick Launch Icon at the bottom center of the screen to create new notes.

Figure 7: Quick Launch

4. Using the options, you can:

- Create a quick note
- Create a note
- Create a form note
- Create a photo note

- Create a point note
- Create a line note
- Create a polygon note

2. View Notes

The Notes screen displays the notes that were recently updated or created with details. You can press the **Map** and **List** tabs to view the notes in **Map** and **List** view. The top section of the screen displays the notebook name and the total number of notes is also displayed.

You can specify if you want to view the Notes and Tasks or only the Tasks by selecting the options using the **Filter** icon.

2.1. View Notes – List & Tab View

1. The **Notes List** view displays the notes that were recently updated or created with details such as Note Type, Note Name, Modified date, Created by, and Location.
2. You can press the tab and list view icons on the top right side of the screen to alternate the display view of the notes.

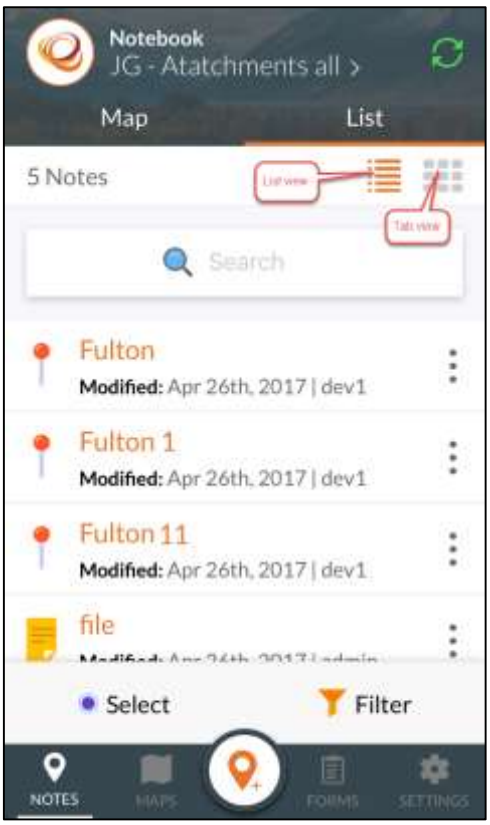
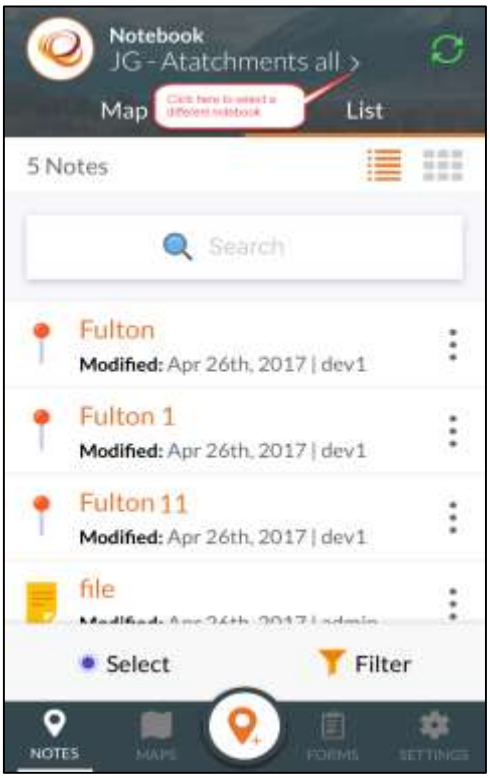


Figure 8: Notes - List View

3. In the List view, the notes are displayed in a list. The Tab view displays the notes as cards.

Figure 9: Notes - Tab View

4. If you want to select a different notebook, press the navigation arrow near the notebook name, based on which the corresponding notes and tasks are displayed. The list displays all the notebooks available in the server with the **Download** icon. Press to download the notebook. You can create a new notebook by pressing the **New** button on the top right section.



5. To view and modify a note, press on the note name. The note opens as shown below:

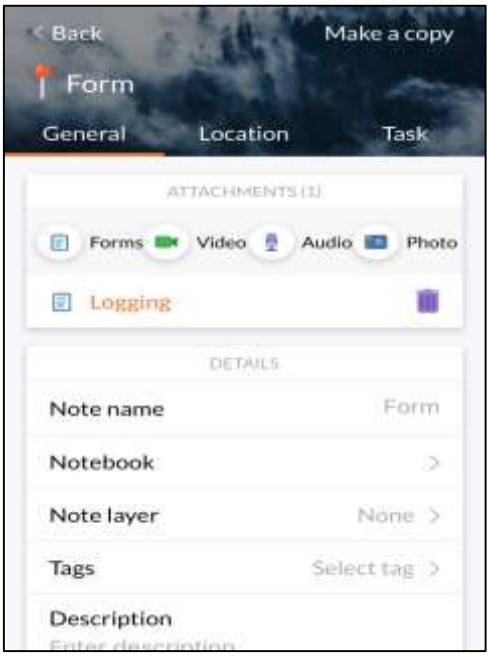
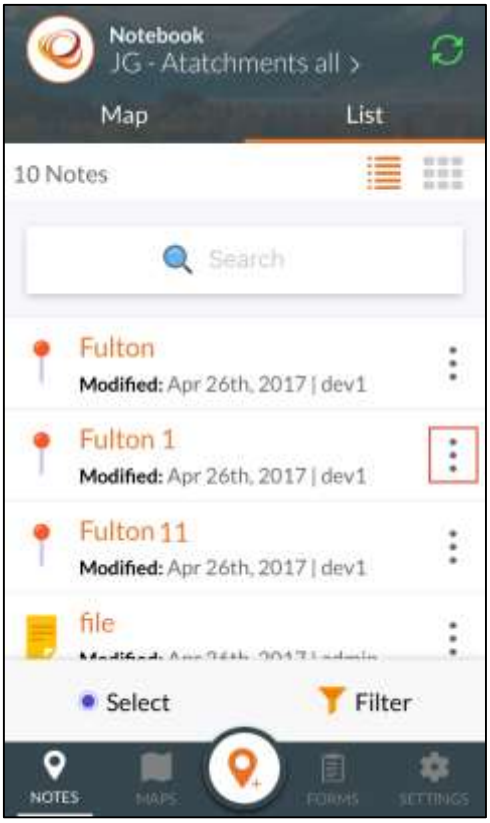
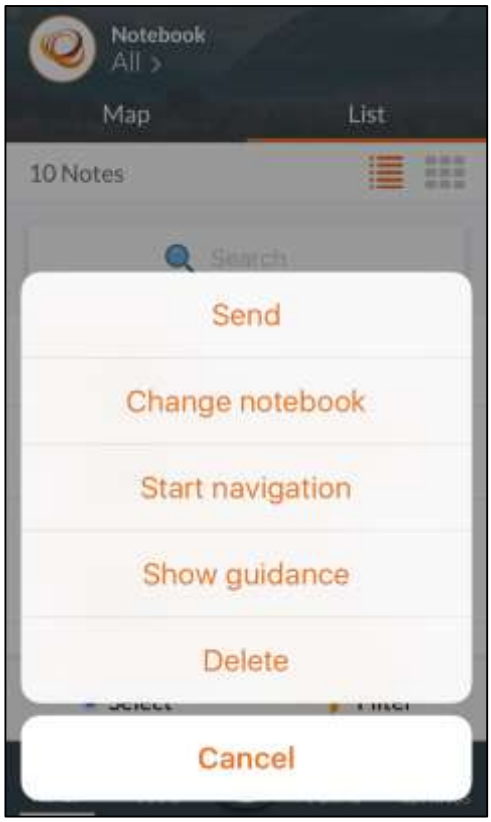


Figure 10: Note

6. To move, share or delete a note, press the settings icon on the right side of the corresponding note.





7. In the Tab view, press the corresponding icons as shown and explained below:

- **Send**: Press this option to share the note with other users as PDF, geopackage, or as an export file.

Figure 11: Share Note

- Press the **PDF** option. The note is now exported as a PDF and a preview of the note is displayed. Now press the Share icon to send the note PDF through mail, message, air drop or drop box.

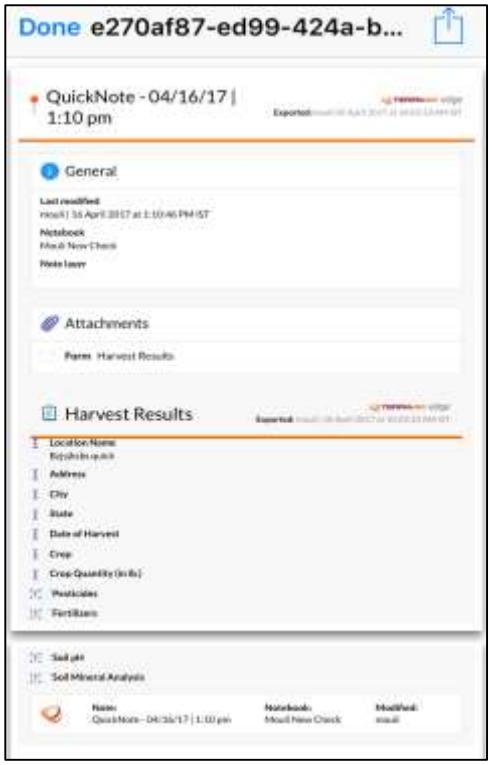


Figure 12: Note share - PDF

- Press the **GPKG** option to share the note as a geopackage file with other users. Press the **Mail** icon and enter the email addresses of the people you want to share the note with. The note is sent as a zip file.

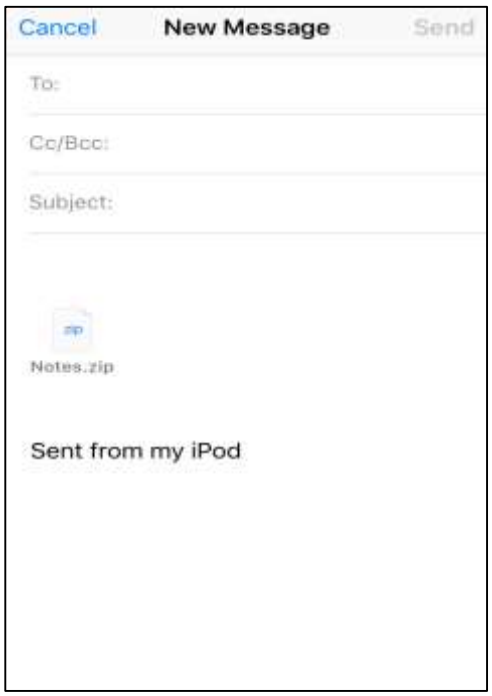


Figure 13: Note share - GPKG

- Press the **Export** option to share the note as an export file with other users. Press the **Mail** icon and enter the email addresses of the people you want to share the note with. The note is sent as an export file.

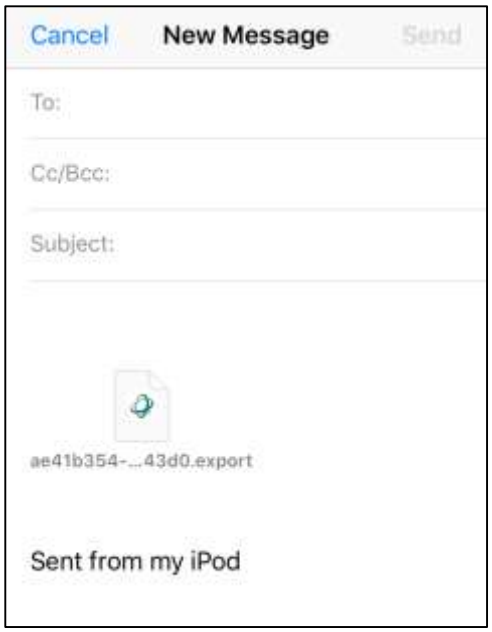


Figure 14: Note share - Edge

- **Change Notebook:** Press this icon to move a note from one notebook to another notebook or to move an unassigned note to a notebook. Every change is added in the note's revision history.

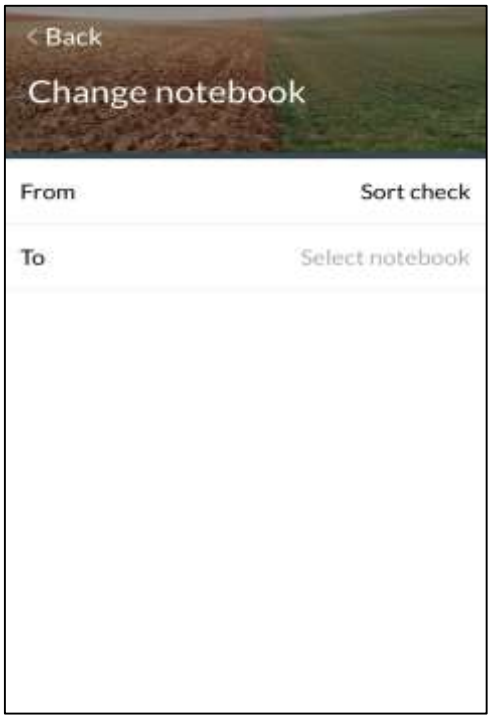


Figure 15: Change notebook

- **Delete**: Press this icon to delete the selected note. Press **Ok** in the confirmation dialog box.

8. You can press the **Select** icon at the bottom of the screen to share, move, or delete multiple notes or tasks.

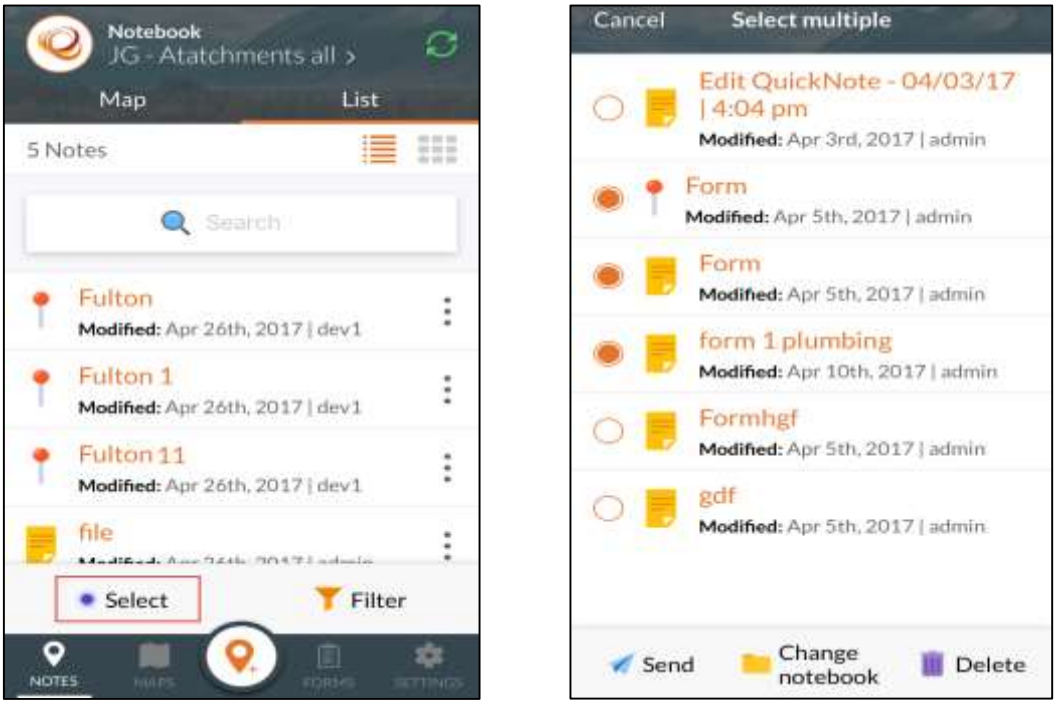


Figure 16: Select Multiple Notes

9. You can share the notes as a pdf, geopackage or an export file.

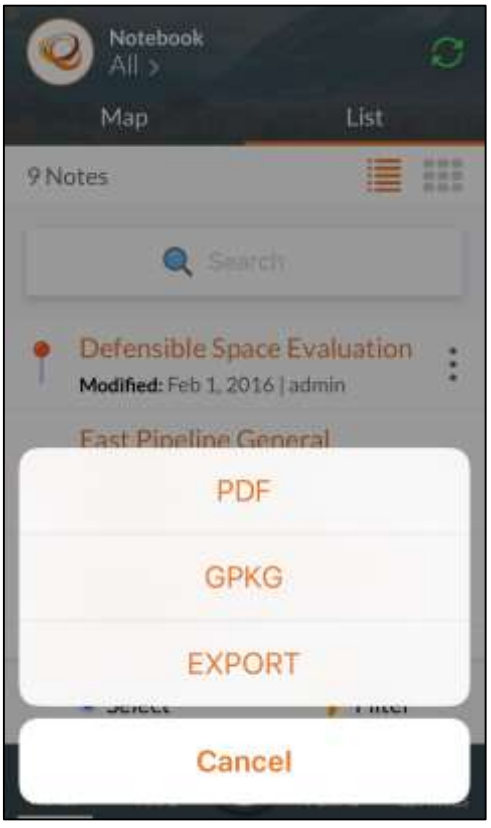


Figure 17: Share notes – List view

10. **Start navigation** : When you select this option, the map view opens displaying the directions from your current location to the selected note's point location. When you press the Guidance button on the top left corner of the screen, the guidance screen opens.
11. **Show guidance** : When you select this option, the guidance screen opens displaying a straight line and the distance between your current location and the note's point location. The distance units is displayed based on the current measurement settings.
12. The **Filter** icon allows you to filter and sort the notes and also choose if you want to display the notes or tasks.
13. In the **Sort** dropdown, you can select the parameters from the following options, based on which the notes will be displayed:

    - Modified
    - Modified by
    - Form name
    - Note layer
    - Attachment type
    - Location description
    - Created date
    - Created by

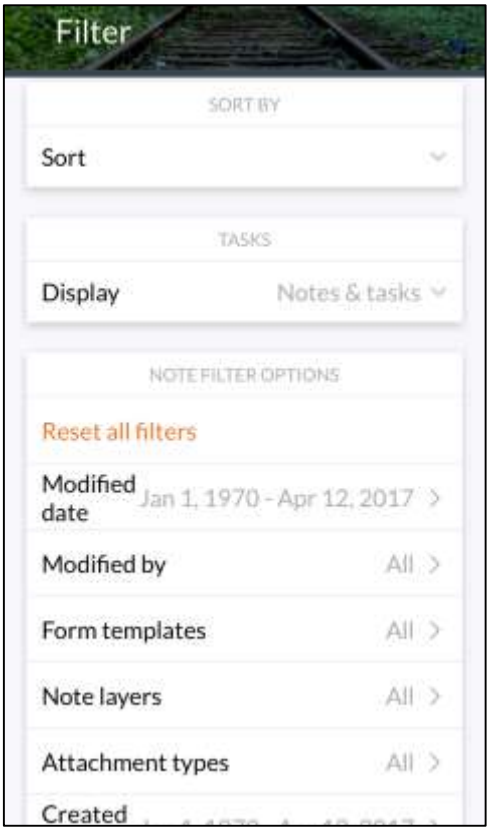


Figure 18: Filter & Sort

14. Under **Tasks**, in the Display dropdown, you can select from the following options, based on which the notes will be displayed.

    - Notes & tasks – Both Notes and Tasks are displayed
    - Tasks only – Only tasks are displayed
    - My tasks – Only tasks assigned to the signed-in user will be displayed

Figure 19: Notes & Tasks Options

15. You can use the **Filter** options to filter the records based on:

- Modified date
- Modified by
- Form templates
- Note layers
- Attachment types
- Created date
- Created by
- Map extent

16. To search for a note, enter the name of the note that you want to view in the **Search** field.
17. To create a new note, press the Quick Launch icon at the bottom center of the screen. You will be redirected to the Create Note screen. **Note**: The Quick note option will be available only if it is enabled in the selected notebook.

Figure 20: Quick Launch

2.2. View Notes – Map View

1. In the Notes section, press the **Map** tab. The Notes map view screen opens displaying all the notes as shown below with a pointer icon at your current location. The recenter icon re-centers your position on the screen.

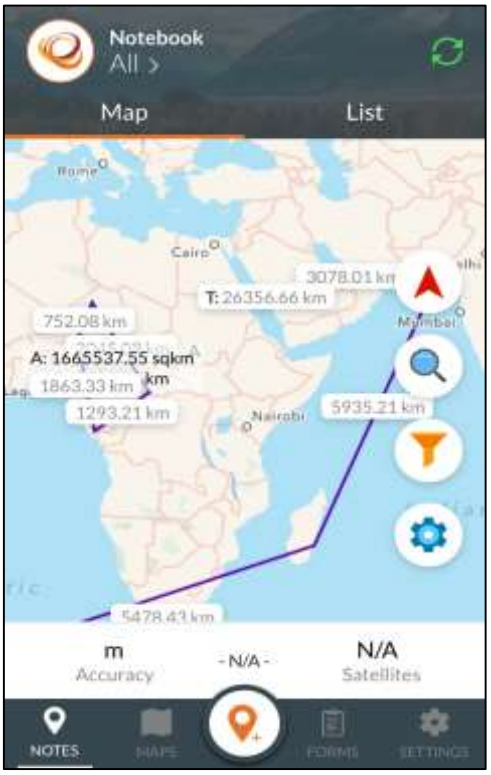


Figure 21: Notes - Map view

2. If you want to select a different notebook, press the navigation arrow near the notebook name at the top section of the screen, based on which the corresponding notes and tasks are displayed.
3. The **Filter** icon allows you to filter and sort the notes and also choose if you want to display the notes or tasks.
4. In the **Sort** dropdown, you can select the parameters from the following options, based on which the notes will be displayed:

   - Modified
   - Modified by
   - Form name
   - Note layer
   - Attachment type
   - Location description
   - Created date
   - Created by

5. Under **Tasks**, in the Display dropdown, you can select from the following options, based on which the notes will be displayed.

   - Notes & tasks – Both Notes and Tasks are displayed
   - Tasks only – Only tasks are displayed
   - My tasks – Only tasks assigned to the signed-in user will be displayed

6. You can use the **Filter** options to filter the records based on the following parameters:

   - Modified date
   - Modified by
   - Form templates
   - Note layers
   - Attachment types
   - Location description
   - Created date
   - Created by
   - Map extent

7. To search for a note, enter the name of the note that you want to view in the **Search** field.

8. To create a new note, press the Quick Launch icon at the bottom center of the screen. You will be redirected to the Create Note screen. **Note**: The Quick note option will be available only if it is enabled in the selected notebook.

Figure 22: Quick Launch

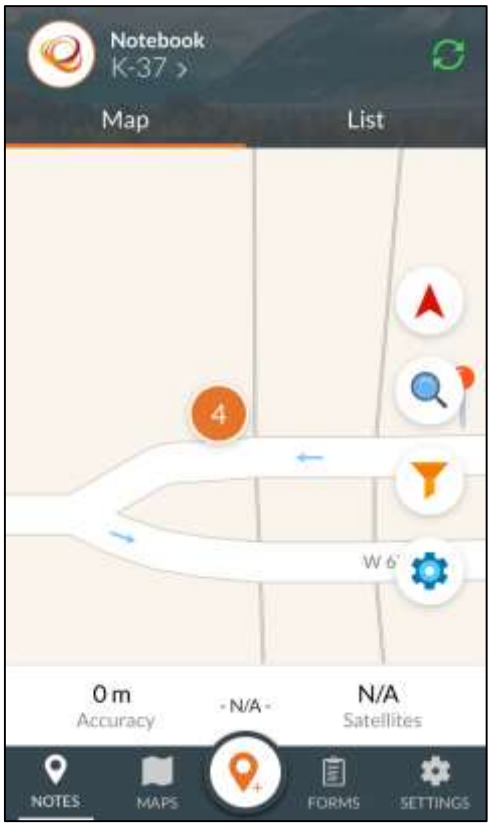
9. To view the note details, press on the note name on the map. A note map card opens displaying the details of the note. To edit the note details, press on the note name. The pin marker icon allows you to realign the map to the note's location. You can press the share, move and delete icons to move a note from one notebook to another, delete the note, and share the note as a pdf, gpkg, or export file. When you press the **Start navigation** and **Show guidance** icons**,** the map view opens displaying the directions from your current location to the selected note's point location. When you press the Guidance button, the guidance screen opens displaying a straight line and the distance between your current

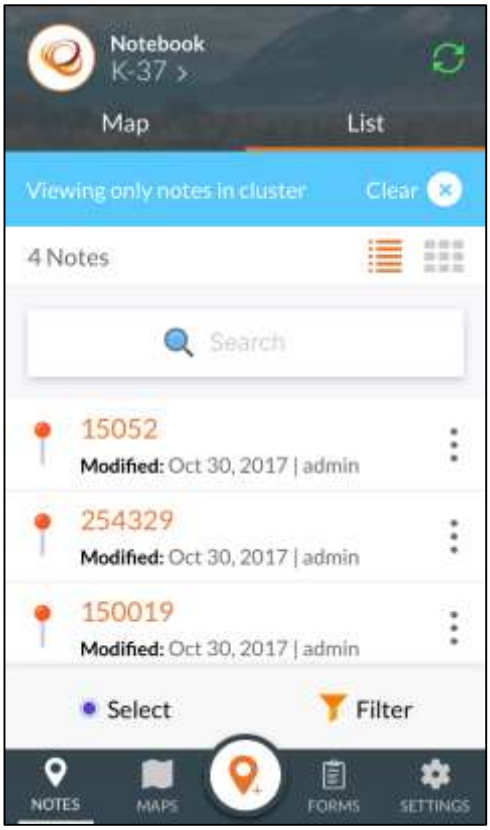
location and the note's point location. The distance units is displayed based on the current measurement settings.

Figure 23: Note Map card

10. Press the Settings icon at the bottom right side of the screen. The Map settings screen opens as shown below, where you can select maps and map overlays and also specify note display and measurement settings.

    - **Map Display:** In the **Map** and **WMS Overlays** fields, you can select from the list of existing map maps and map overlays. If the **Show GPS status bar** button is toggled on, the location coordinates of your current location with additional GPS metadata such as accuracy, altitude, and number of satellites is displayed on the map.
    - **Notes:** By default, all the buttons are toggled on and the notes are displayed on the map as points, polylines, or polygons. If the **Show all notes** button is toggled on, all the notes are displayed in the map. When the **Enable note clustering** button is toggled on, the notes appear clustered. In the map view, when you tap a cluster that is at its lowest zoom level and can't be broken out anymore, the notes list opens in a cluster filter mode with a blue info bar at the top of the notes list. You can press the **Clear** icon to return to the notes list view.





- **Measurements:** If you toggle on the **Show measurements** button, the measurement visibility options are made available for you to select, based on which the distance and measurements of the polylines and polygons are displayed on the map. The following toggle buttons are available in the Visibility Options section:
    - **Single line segment length:** This option will allow you to measure the length of a single line
    - **Total line segment length:** This option will allow you to measure the total length of a line
    - **Polygon area:** This option will allow you to measure the area of a polygon that you draw
    - **Polygon perimeter:** This option will allow you to measure the perimeter of a polygon that you draw.
- **Geometry:** When the **Show polygons** and **Show polylines** buttons are toggled on, the polygons and polylines are displayed on the map.

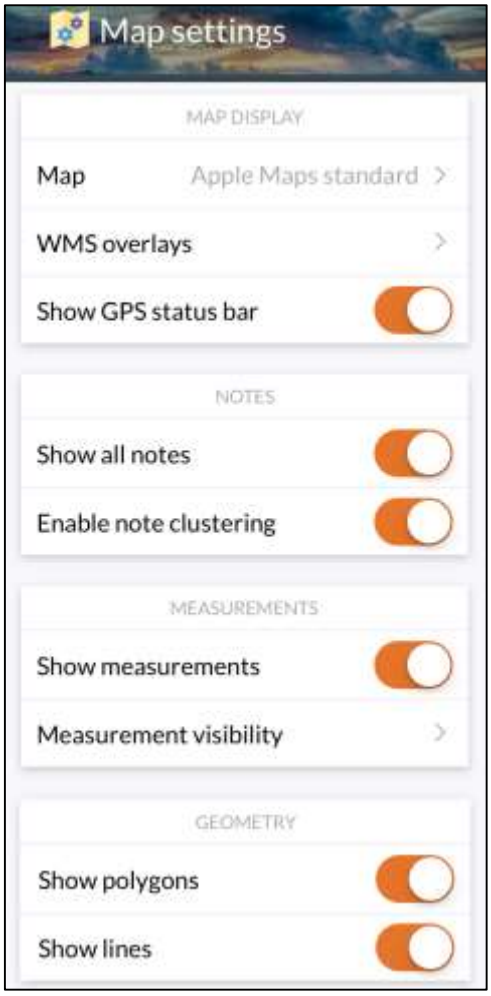


Figure 24: Map Settings

3. View Maps & Overlays

3.1. Offline and Online Maps

1. The **Maps** section displays all the offline and online maps available in the server.
2. The **Offline** tab displays the list of offline maps related to the notebooks available in your device with the map name, creator, and creation date with timestamp details.

Figure 25: Offline Maps

3. The **Online** tab displays the list of all the online maps.

Figure 26: Online Maps

4. To view the map, click on the map name. The map preview opens. If you press the **Select** option on the top right corner of the screen, the selected map is displayed in the Notes map view. The recenter icon re-centers your position on the screen. To view a certain location on the map, press the Search icon and enter the location name in the **Map search** field. The pagination arrows on the bottom of the screen enables you to navigate between the available maps.

Figure 27: Map preview

5. Press the **Filter** icon to sort and filter the maps. In the **Sort** dropdown, you can select the parameters from the following options, based on which the maps will be displayed:

   - Map name
   - Created date
   - Created by

6. You can use the **Filter** options to filter the records based on the following parameters:

   - Created date
   - Created by

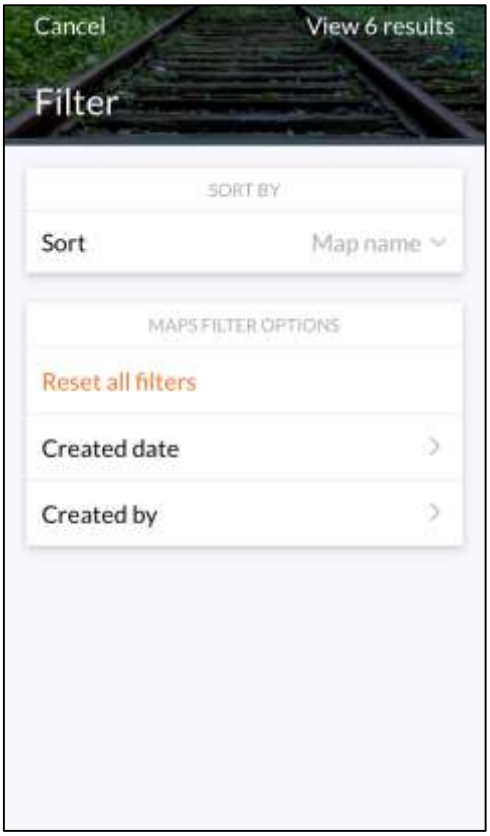


Figure 28: Sort and Filter Maps

7. You can search for a map by entering your queries In the **Search maps** field.
8. Press the **Send** icon corresponding to the map to share through mail.

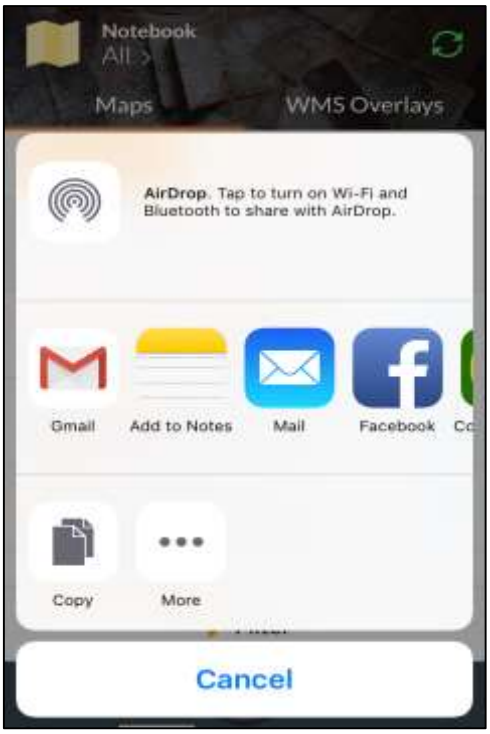


Figure 29: Share Map

3.2. Overlays

1. The **WMS Overlays** tab displays all the available WMS Overlays with the overlay title, created from, type, and created date.

Figure 30: Maps Overlays

2. Click on the overlay title to view the map overlay. The map overlay preview opens. If you press the Select option on the top right corner of the screen, the selected map overlay is displayed in the Notes map view. The recenter icon re-centers your position on the screen. To view a certain location on the map, press the Search icon and enter the location name in the **Map search** field. The pagination arrows on the bottom of the screen enables you to navigate between the available map overlays.

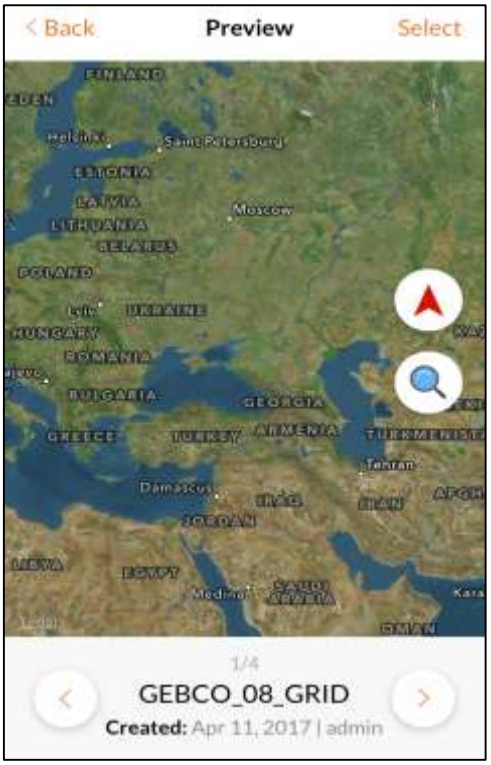


Figure 31: Map Overlay Preview

3. Press the **Filter** icon to sort and filter the records. In the **Sort** dropdown, you can select the parameters from the following options, based on which the map overlays will be displayed:

   - Title
   - Created Date
   - Created By

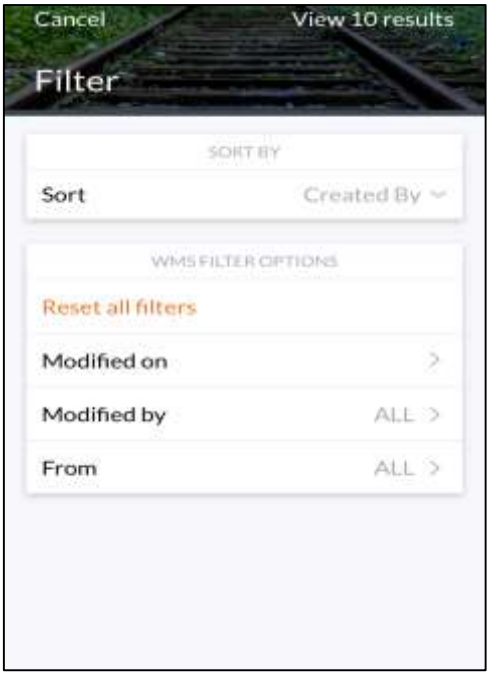


Figure 32: Sort and Filter map overlays

4. You can use the **Filter** options to filter the map overlays based on the following parameters:

   - Modified on
   - Modified by
   - From

5. Press the **Send** icon corresponding to the WMS Overlay to share through mail.
6. You can search for a WMS overlay by entering your queries In the **Search WMS Overlays** field.

4. View Forms

1. The **Forms** section displays all the forms related to the notebooks that are available in your device.

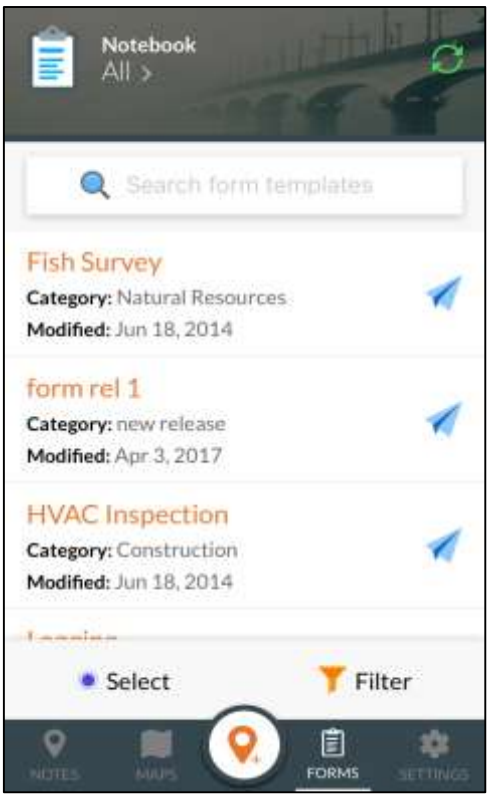


Figure 33: View forms

2. You can search for a form by entering your queries in the **Search form templates** field. You can also search by using the form data as your queries.
3. The **Filter** icon allows you to filter and sort the forms. In the **Sort** dropdown, you can select the parameters from the following options, based on which the forms will be displayed:

   - Category
   - Name
   - Modified date
   - Modified by

4. You can use the **Filter** options to filter the records based on:

   - Modified date
   - Modified by
   - Category

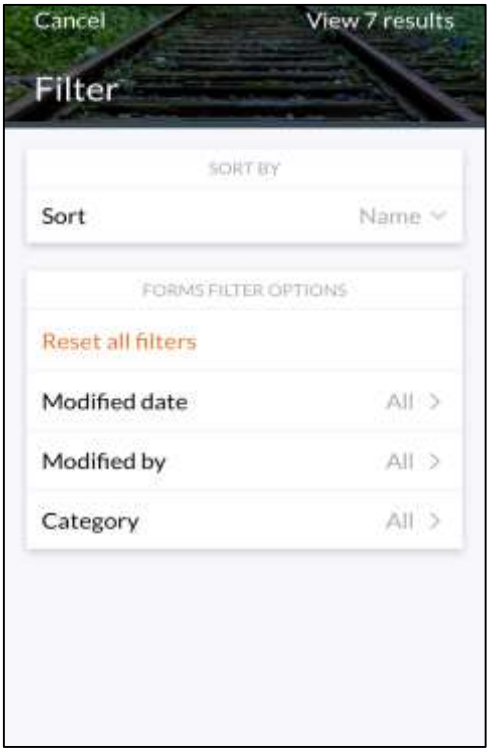


Figure 34: Filter & Sort

5. Press the Send icon to share the form as a PDF with other users through mail.
6. Press on the form name to enter the form details and create a form note. You'll be taken to the note creation screen.

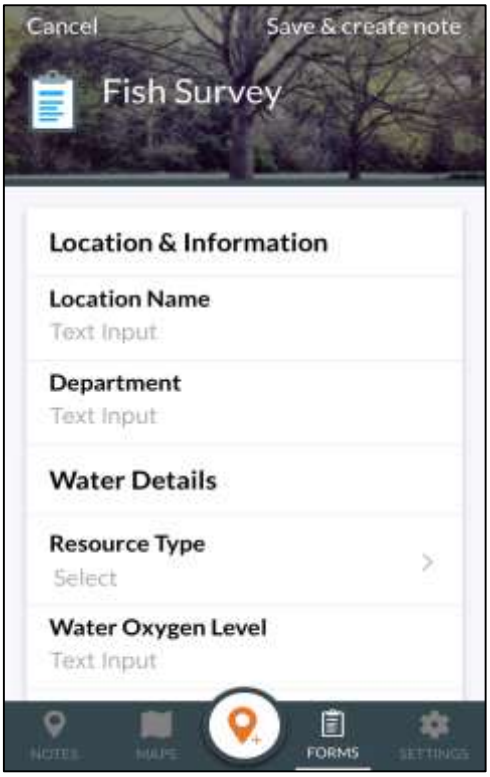


Figure 35: Enter form details

5. Creating Notes

5.1. Creating Assigned/Unassigned Notes

1. Press the Quick launch icon and then the **Note** icon. The note screen opens as shown below:

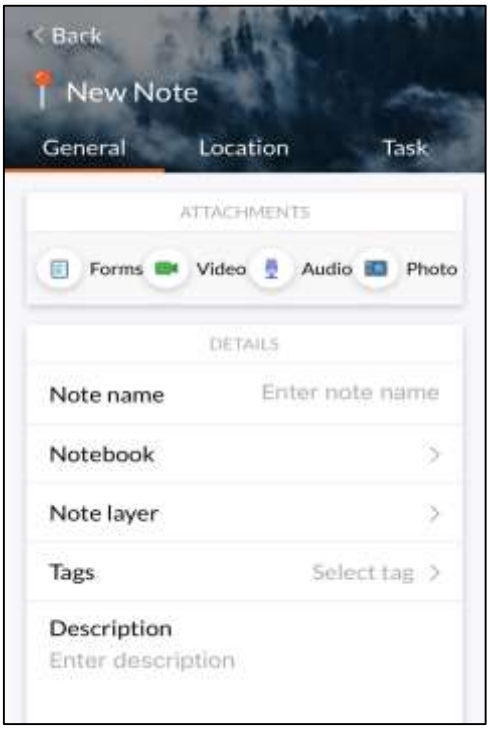


Figure 36: Note – General

2. To create assigned notes, select the notebook in the Notebooks section. If you want to create unassigned notes, select None.
3. On the note screen, there are three tabs: **General, Location**, and **Task.**
4. On the **General** tab, enter a name and a short description for the note in the **Note name** and **Description** fields.
5. The **Notebook** field displays the notebook that you selected. If you want to change the notebook, press the navigation arrow to select a notebook in which you want to assign the note to.
6. In the **Note Layer** field, press the navigation arrow to select a note layer name. To create a new note layer, press **New** at the top right corner of the screen. In the **New Layer** screen that opens, enter the name of the new note layer and press the **Save** button. The note layer will be added to the list. Select the note layer and press **Back** to go back to the note screen. The note will be created under the new layer that you created.

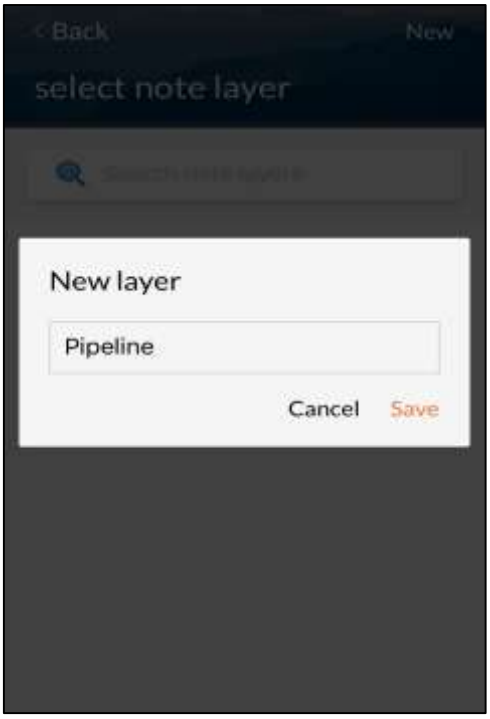


Figure 37: Create note layer

7. If Symbology is enabled, the note's pin marker is symbolized in the notes list view and map view based on the color assigned for the selected note layer.

   Note: The symbology feature enables you to symbolize the pin markers by setting different colors for each note layer, thus providing you with a better interpretation of the data in the map. Each note layer is assigned a color, based on which the corresponding note's pin marker will be symbolized. You can use upto 20 colors. This symbology feature will be provided in Edge only upon customer's request.

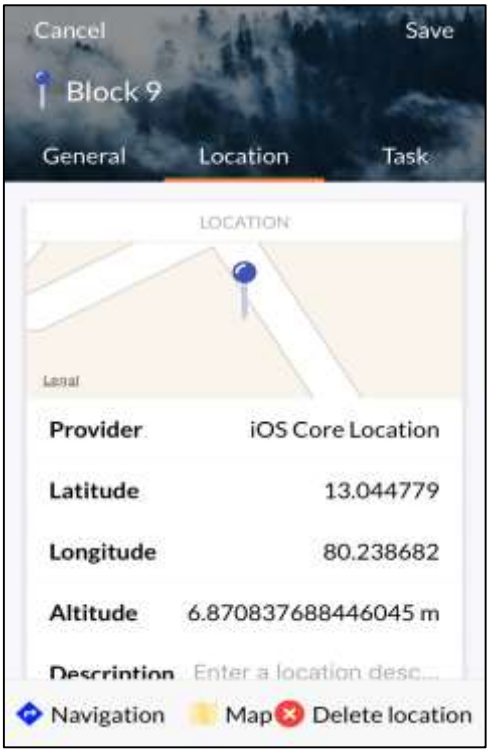


Figure 38: Symbology - Note pin marker

8. In the **Tags** field, press the navigation arrow to select and add tags for the ease of identification. Multiple unique tags can be attached to a note. To create a new tag, press **New** at the top right corner of the screen. In the **New tag** screen that opens, enter the name of the new tag and press the **Save** button. The tag will be added to the list. Select the tags that you want to attach to the note. Press **Back** to go back to the note screen.

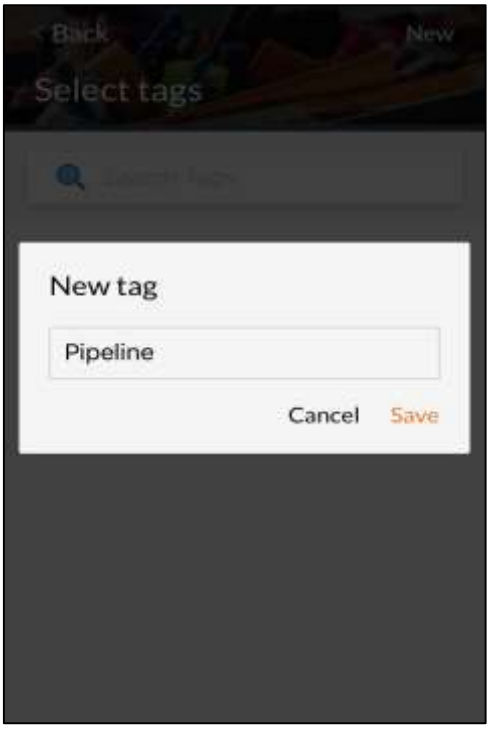


Figure 39: Adding tags

5.1.1. Adding Location to a Note

On the **Location** tab, the **Location** section displays the location coordinates of your current location and the **Location Metadata** displays the GPS metadata such as accuracy, altitude, number of satellites, bearing, etc. and also the measurement information.

Note: The location data are provided to the app based on the location service providers and the rate interval that you specified in Location Settings. Based on the accuracy of the data provided, Edge will either use the standard location service or the third party GPS device data. The progress bar will display the rate interval at which the location data is provided to the Edge app that is specified in Location settings.

If the **Enable laser rangefinders (LRFs)** button is toggled on in Location Settings, Edge will use the paired device to capture the location data.

If the location data services are turned off, the Location tab displays the Point, Line, and Polygon icons.

If the **Proximity alert** button is toggled on in Location Settings, a proximity alert message with sound and vibration is displayed when your current distance from the selected note's location point is less than or equal to the defined proximity distance.

1. The **Location** section on the Location tab displays your current location's coordinates. If you press the **Delete location** button, the location coordinates are cleared.

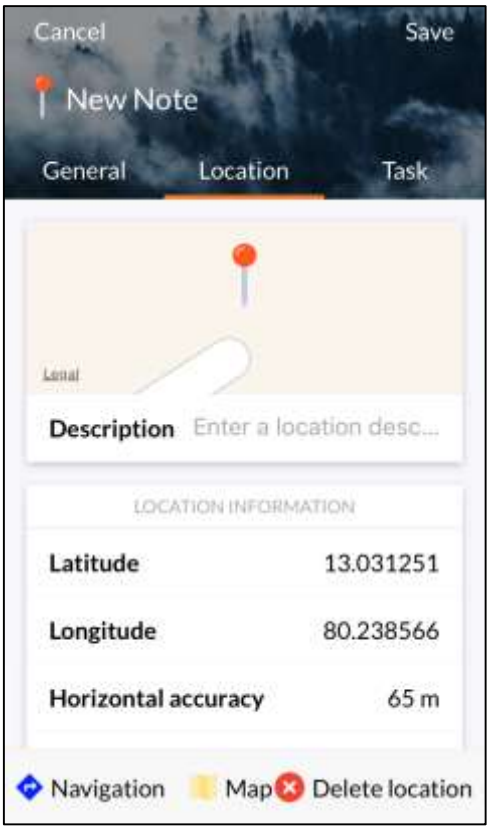


Figure 40: Current Location Coordinates

2. When you press the Navigation icon on the bottom left corner, the map opens displaying the directions from your current location to the selected note's point location. When you press the Guidance button on the top left corner of the screen, the guidance screen opens.

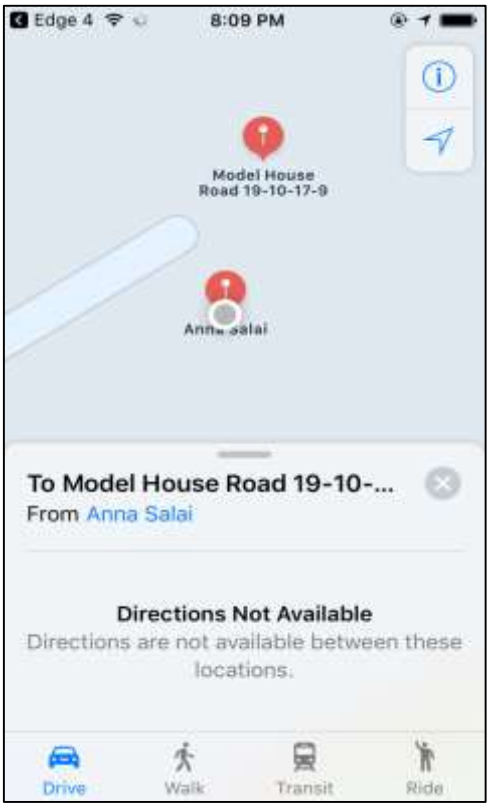


Figure 41: Directions

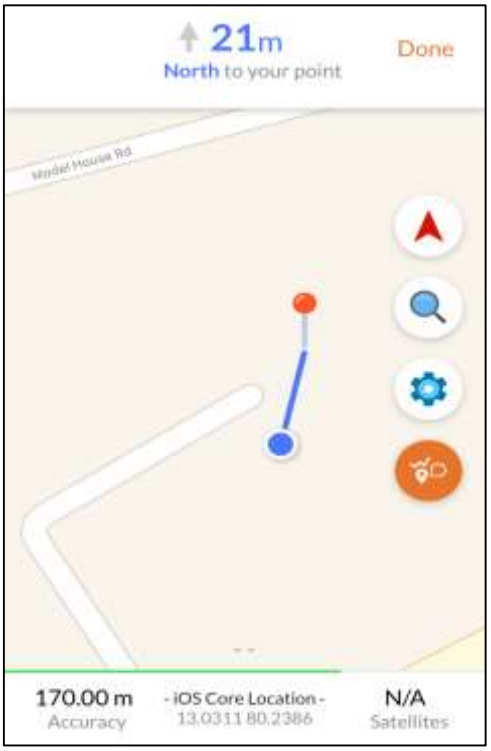


Figure 42: Guidance

3. When you enter the close proximity area (**Proximity alert** button must be toggled on in Location settings), which is when your current distance is less than or equal to the defined proximity distance from the selected note's location point, a proximity alert message with sound and vibration is displayed. This proximity alert distance can be specified in location settings. An alert message with saying “You’re almost there” is displayed for 3 seconds when you enter the close proximity and the line, distance, and direction are displayed in green color, after which it changes to blue when you leave the close proximity area. A straight line is displayed between your current location and the note’s point location. Also the distance and direction from your current point is displayed. You can dismiss this alert by pressing the **Dismiss** button. You can change the proximity alert distance by pressing the **Settings** button.

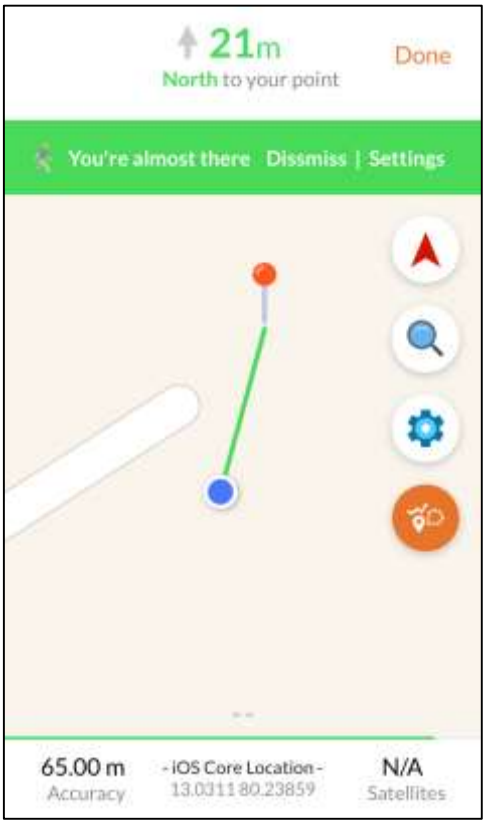


Figure 43: Proximity alert

4. To view the map, press on the map near the **Description** or the **Map** icon at the bottom corner of the screen. The map opens displaying a pin marker at your current location. The recenter icon re-centers your position on the screen. If you press the Guidance button on the bottom left corner of the screen, the guidance screen opens displaying a straight line and the distance between your current location and the note’s point location. Press **Back** to go back to the note.

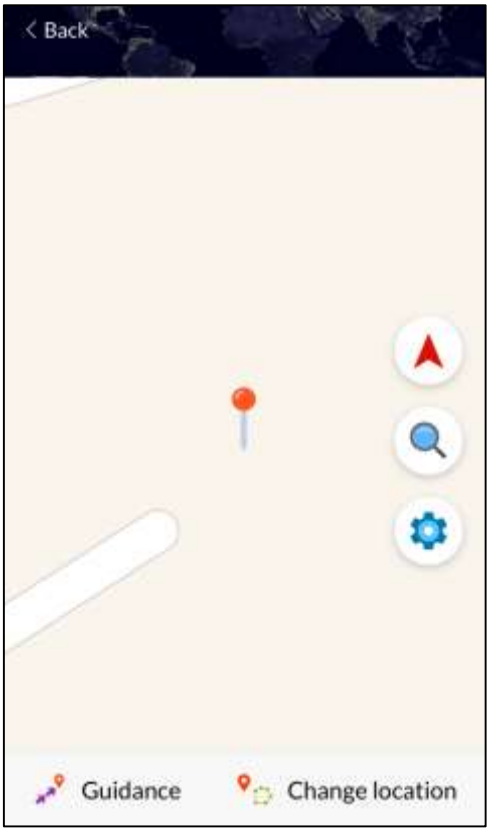


Figure 44: Guidance

5. Press the **Settings** gear icon on the map screen. The Map settings screen opens as shown below, where you can select map, map overlays, and measurement settings. Press **Back** to go back to the map.

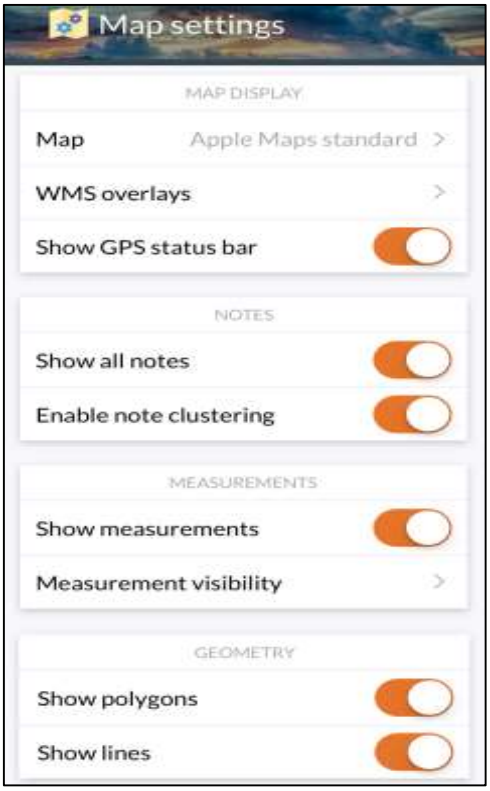
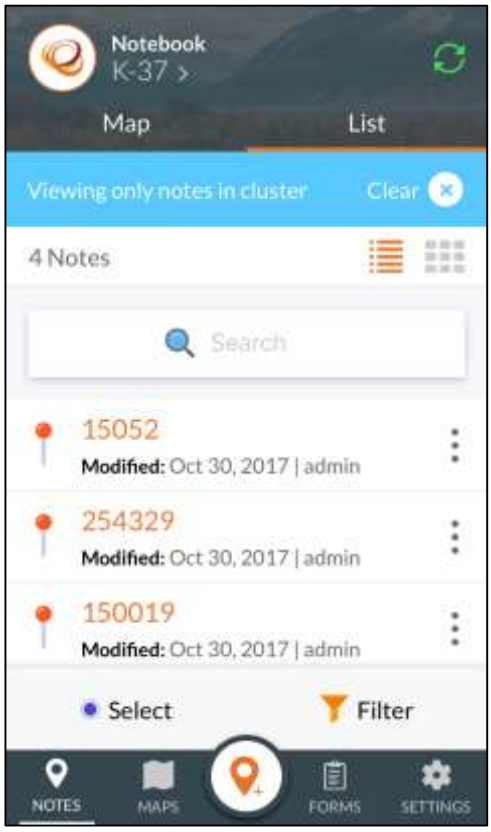


Figure 45: Map Settings

6. Under **Map Display,** in the **Map** and **WMS overlays** fields, you can select from the list of existing map maps and map overlays. If the **Show GPS status bar** button is toggled on, the location coordinates of your current location with additional GPS metadata such as accuracy, altitude, and number of satellites is displayed on the map.
7. In the **Notes** section, if the **Show all notes** button is toggled on, all the notes are displayed in the map as points, polylines, or polygons. When the **Enable note clustering** button is toggled on, the notes appear clustered. In the map view, when you tap a cluster that is at its lowest zoom level and can't be broken out anymore, the notes list opens in a cluster filter mode with a blue info bar at the top of the notes list. You can press the **Clear** icon to return to the notes list view.



8. In the **Measurements** section, if you toggle on the **Show measurements** button, the distance and measurements of the polylines and polygons are displayed on the map.
9. The following toggle buttons are available in the **Measurement visibility** section:

    - **Single line segment length:** This option will allow you to measure the length of a single line
    - **Total line segment length:** This option will allow you to measure the total length of a line
    - **Polygon area:** This option will allow you to measure the area of a polygon that you draw
    - **Polygon perimeter:** This option will allow you to measure the perimeter of a polygon that you draw.

10. In the **Geometry** section, when the **Show polygons** and **Show polylines** buttons are toggled on, the polygons and polylines are displayed on the map.

11. The show geometry icon if pressed will display the polygons and polylines on the map. Press **Back** to return to the map.

    Note: This icon is available only in the note creation map view screen.

12. If you want to search for a location, press the Search icon and enter the location that you want in the **Search** field. The map displays the location that you searched.
13. To change your location, press the **Change location** button at the bottom of the map. A popup window opens displaying the **Edit point**, **Replace with line**, and **Replace with polygon** options.

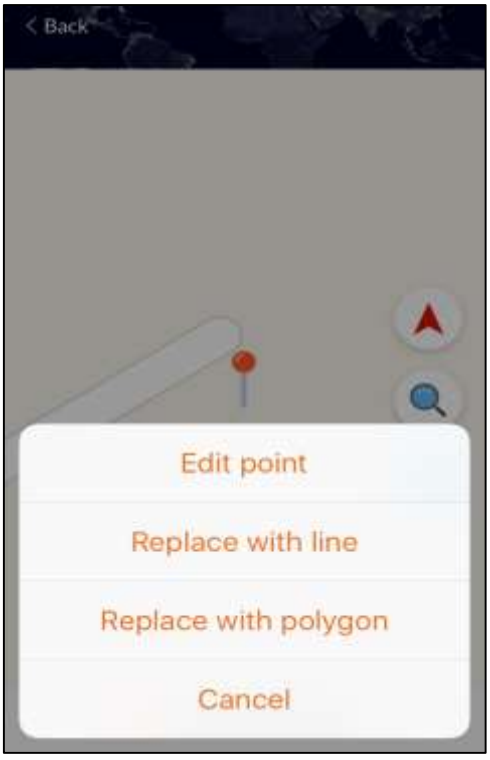


Figure 46: Change Location Options

- **Edit point**: Once you select this option, the map opens displaying a pin marker at your current location.
    - If you want to mark your current location, on the **Capture** tab, press the **Capture** button and press **Done**.

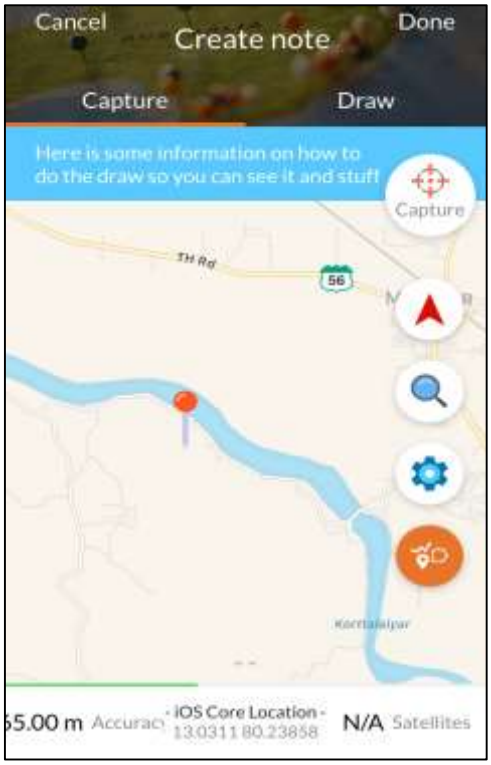


Figure 47: Capture

- Or, if you want to tap somewhere else on the map, on the **Draw** tab, press the **Tap** icon. The Target and Drop options are displayed. With the Target icon selected, the location coordinates of your location are displayed. You can press the Drop icon where you want and a pin marker will be dropped at that point.

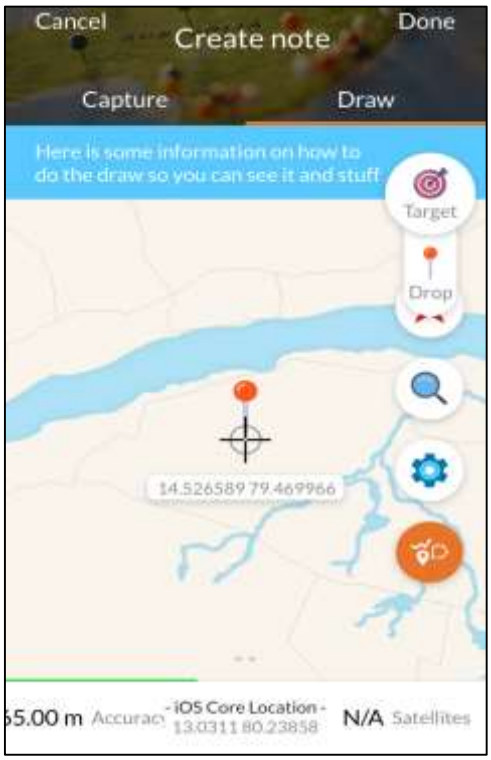


Figure 48: Drop

- If you do not want the location coordinates displayed, press the Target icon, which will enable the Tap icon and disable the Target icon. You can tap anywhere on the map and a pin marker will be dropped at that point. Press **Done**.

Figure 49: Tap

- The coordinates for the point that you selected are displayed on the Location tab.

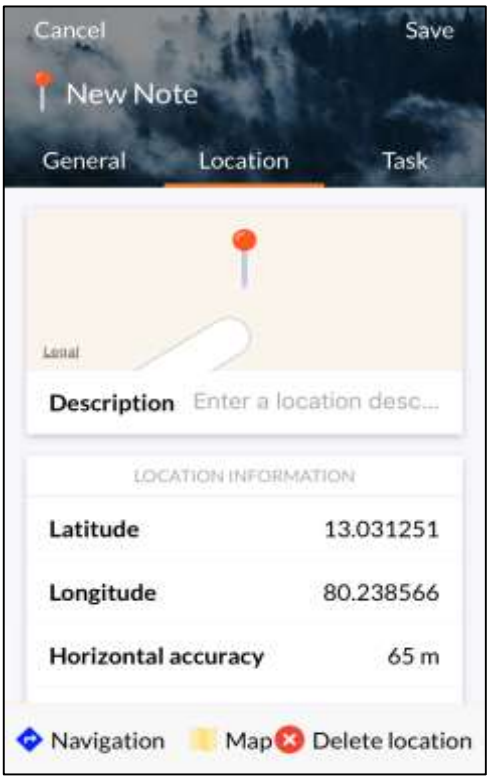


Figure 50: Point – Location Coordinates

Note: If the note type is a polyline, you can only change the location of the polyline. To change it to a point, you must select the Replace options.

- **Replace with line** & **Replace with polygon:** Select these options if you want to change the note type as a polyline or a polygon.

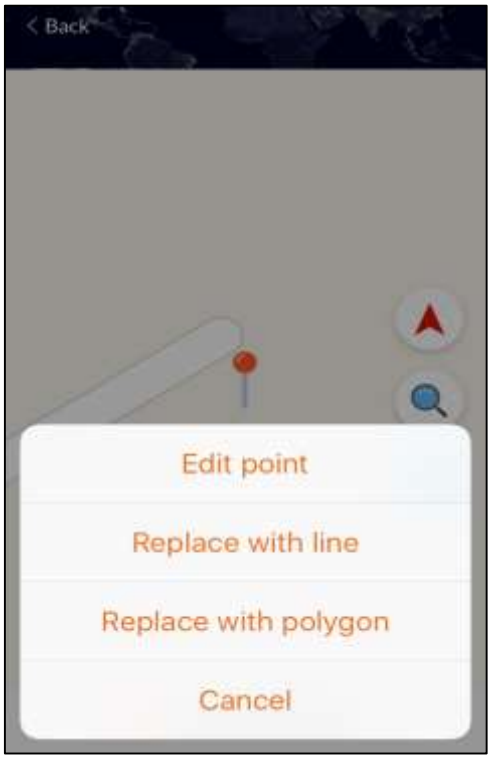


Figure 51: Replace Options

A warning message is displayed if the accuracy is between the specified warning threshold and the restriction threshold, and you will be restricted from capturing the location if the accuracy exceeds the restriction threshold specified in the Location Services Settings.

Note: For example, if the warning threshold is set at 5 meters and the restriction threshold is set at 10 meters, a warning message is displayed if the accuracy is anywhere between 5 and 10 meters and a restriction message is displayed if the accuracy exceeds 10 meters.

- To measure the distance of the lines or the area of the polygons that you draw, toggle on the buttons in the **Measurement visibility** options under **Measurements** in the **Map Settings**.
- On the **Record** tab, press the **Start** button to create lines and polygons tracking your moves. Once you start recording, vertices are created after you cover the distance specified in the Location Settings, based on the refresh rate interval. The distance between each vertex is displayed in the unit that you specified in the settings. If you leave the Record screen, the recording is paused. You can pause and resume your recordings by pressing the Pause button.

Figure 52: Replace Location – Start Recording

Figure 53: Replace Location – Pause Recording

- To capture your current location during recording, on the **Capture** tab, press the **Capture** button. A vertex is created at your current location. You can then resume your recording on the **Record** tab.

Figure 54: Capture GPS Location

- You can also draw a line or polygon using the **Tap** icon on the **Draw** tab by tapping on the map where you want. If the Target icon is on, the location coordinates of the vertices are displayed on the map and you can drop the pin at the location. You can then resume your recording on the **Record** tab.

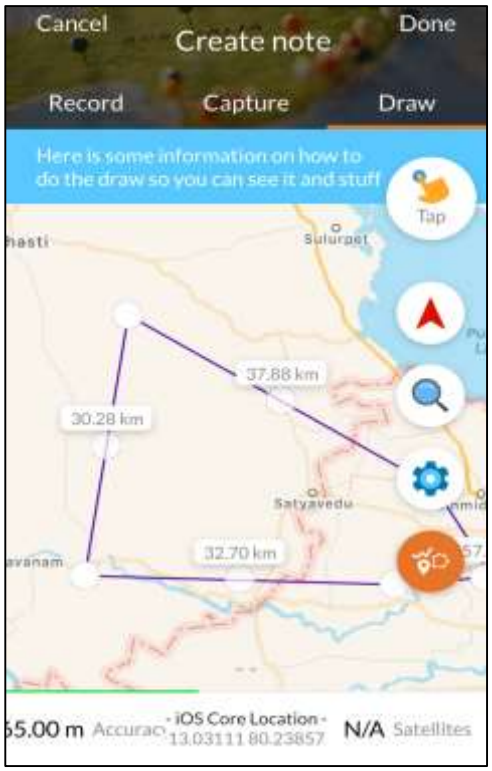


Figure 55: Draw line or polygon - Tap

Figure 56: Draw line or polygon - Drop

- Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. If it is a polygon, the area and the perimeter of the polygon is shown. Press Back to go to the Note creation screen.

Figure 57: Polyline

- The coordinates for the vertices created during your recording are displayed on the Location tab.

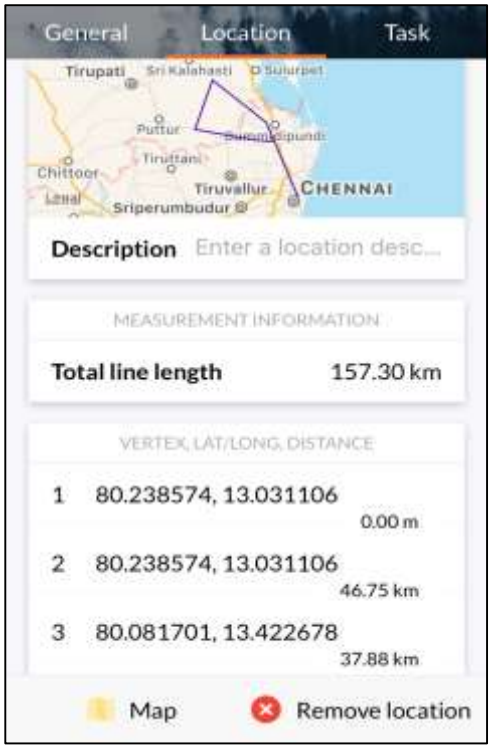


Figure 58: Location Coordinates

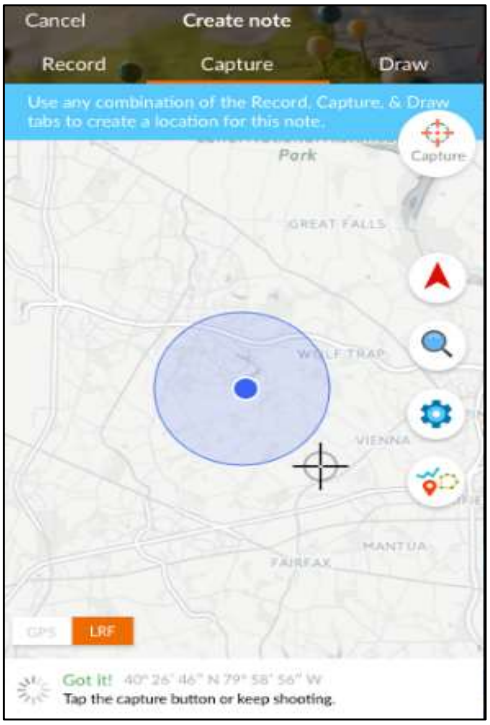
5.1.2. Using Laser Range Finders to Capture Location

Note: The **Enable laser rangefinders (LRFs)** button must be toggled on in Location settings.

1. Toggle on the **LRF** button at the bottom left of the screen in the capture tab, before you start capturing using the rangefinder.

   Note: By default, **GPS** is toggled on.

2. Once a shot is received from the LRF by Edge and the Capture button is pressed, the captured coordinates are displayed at the bottom of the screen.



3. A pin marker will be dropped at the point you captured. The coordinates for the point that you selected are displayed on the Location tab.
4. You can also draw a line or polygon by using multiple shots. When multiple shots are made, the crosshair icon moves to the new location each time a shot is made.
5. Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. The coordinates for the vertices created during your recording are displayed on the Location tab.

5.1.3. Adding Resources to a Note

1. You can add the following resources to a note from the **Attachments** panel:

   - Form
   - Video
   - Audio

- Photo

2. You can attach multiple resources to a note. When you do not make any resource attachments to the note, then the resource type of the note will be a text note, by default.

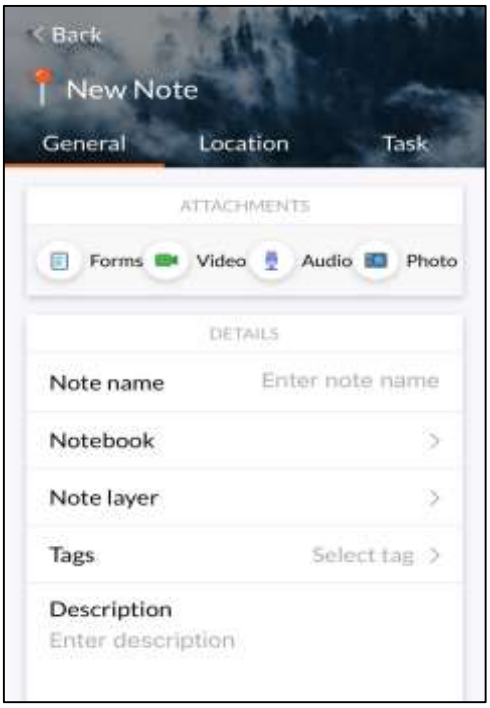


Figure 59: Resource types in a note

3. **Photo:** Press this icon to insert a picture in the note. You can either take a photo using the **Take Photo** option or you can use an existing picture from the library using the **Choose from library** option. To exit the popup menu, press the **Cancel** option.

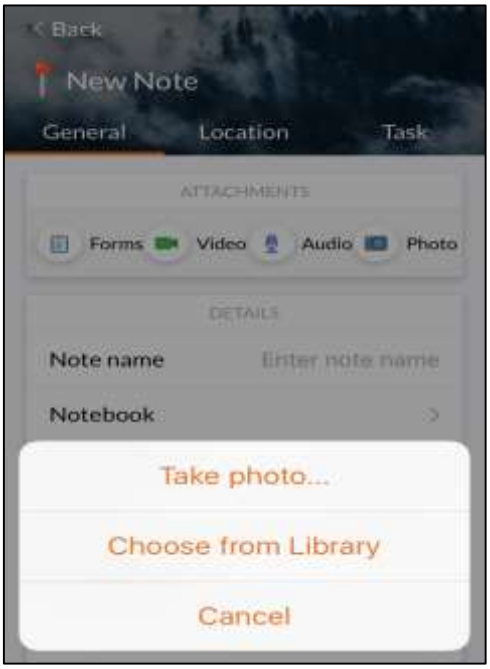


Figure 60: Photo

4. Once you take a photo, press **Use photo**. If you choose from library, select the photo. The Photo is now attached to the note. Click on the photo name to view the photo. A preview of the photo is displayed. You can attach multiple photos to a note. To attach another photo, press the Photo icon.

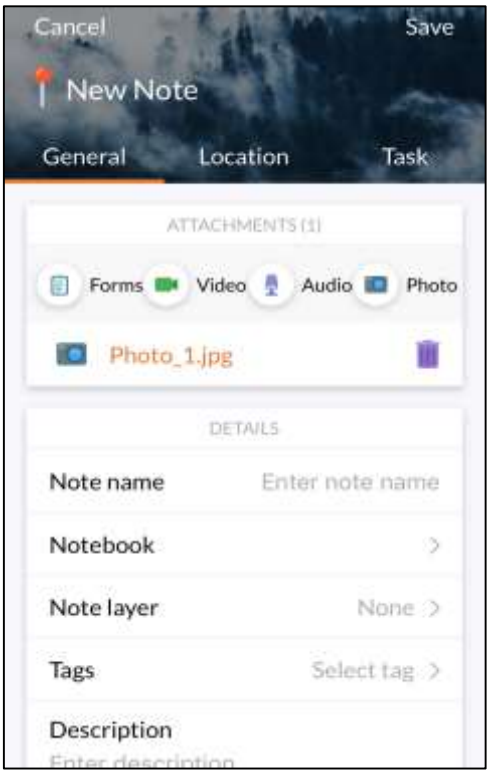


Figure 61: Photo attached in the note

- To view the details and the location coordinates of the photo, press the Details button.

Figure 62: Photo preview

- The **General** tab displays information such as orientation, image length and width, and model and make of the camera used. The **GPS** tab displays the location coordinates of the place the photo was taken. Press the Back button to return to the note.

Figure 63: Photo – General & GPS Details

5. **Video:** Press this icon to insert a video in the note. In the popup menu that opens, you can either take a video using the **Take video** option or you can use an existing video from the library using the **Choose from Library** option. To exit the popup menu, press the **Cancel** option.

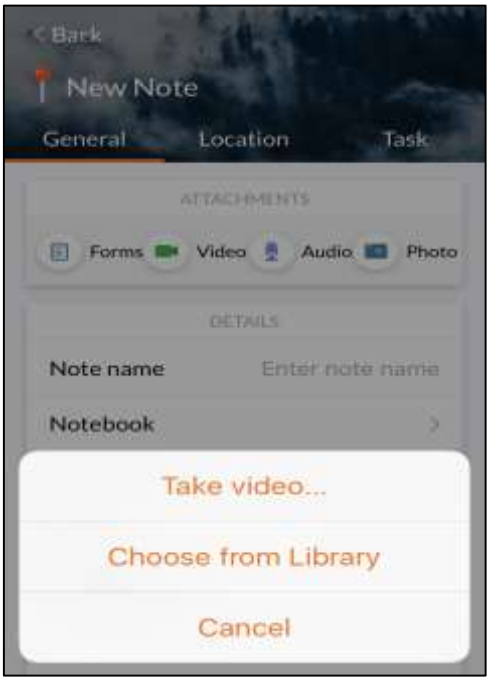


Figure 64: Video

- The video is now attached to the note. Click on the video name to view the video. You can attach multiple videos to a note. To attach another video, press the Video icon.

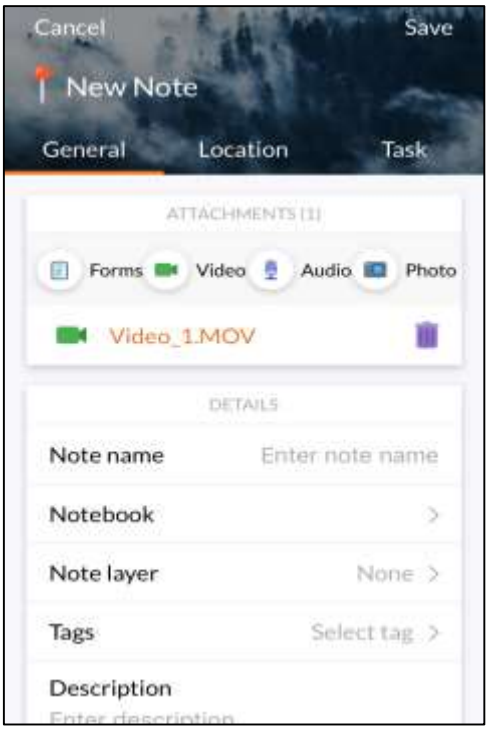


Figure 62: Video attached to note

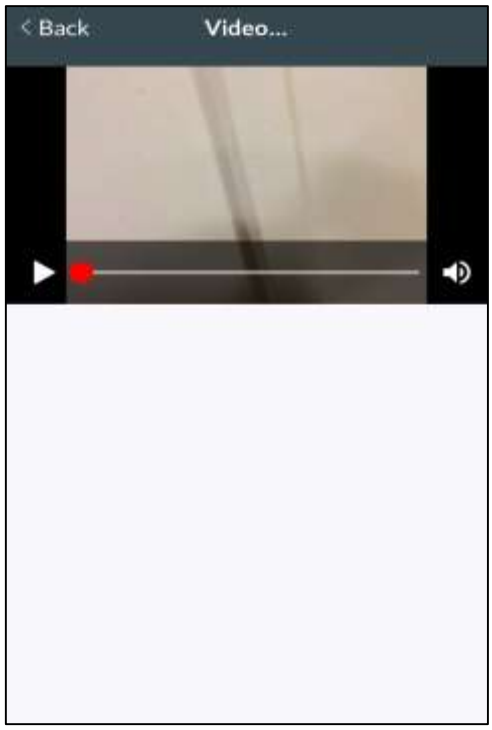


Figure 65: Video preview

6. **Audio:** Press this icon to insert an audio in the note. The **Ready to record** menu opens with **Record** and **Done** buttons. Press the **Record** button to start recording and Pause button to stop recording. Press the Done **button** to return to the note. To exit the **Ready to record** menu, press **Cancel**.

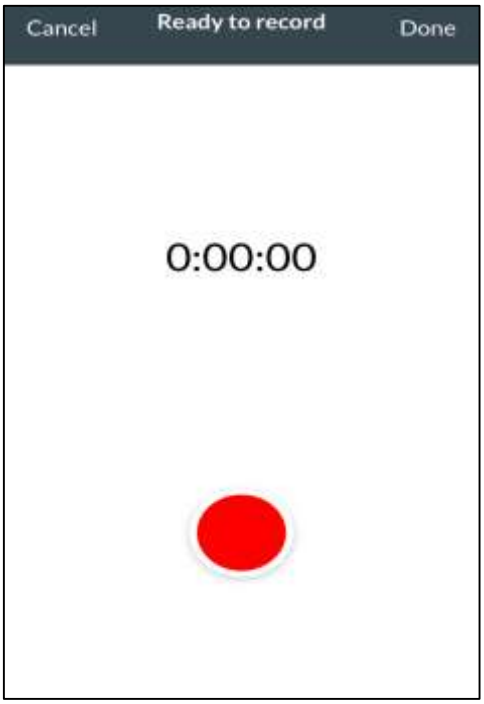


Figure 66: Start recording

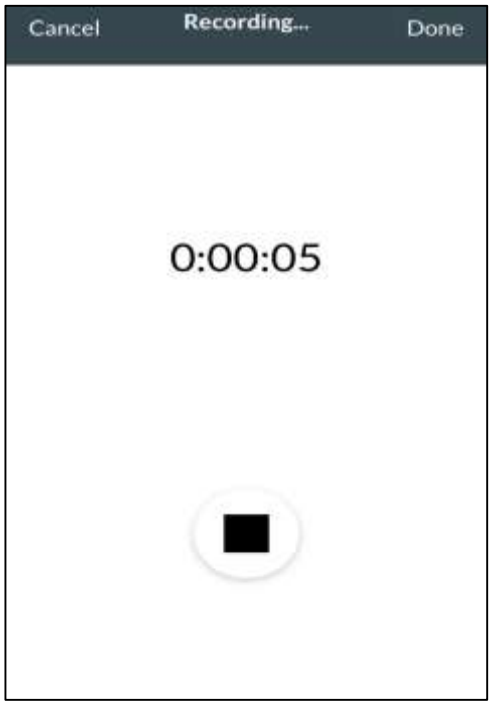


Figure 67: Stop recording

7. The audio is now attached to the note. Click on the audio name to listen to the audio. You can attach multiple audios to a note. To attach another audio, press the Audio icon.

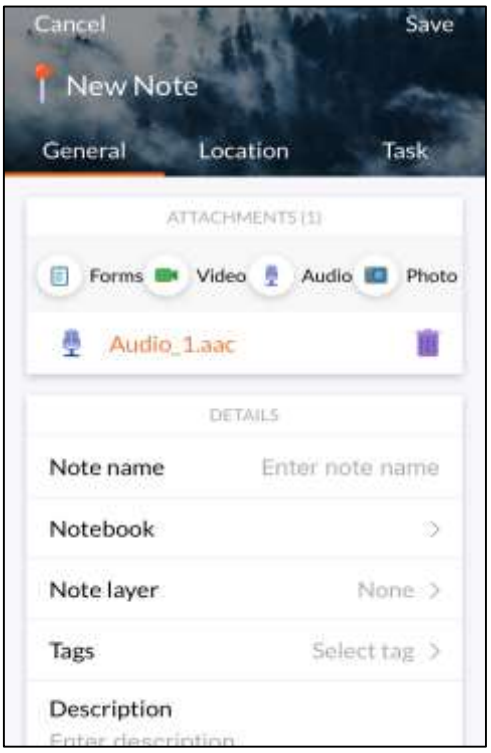


Figure 68: Audio attached to note

Figure 69: Audio preview

5.1.4. Adding Forms to a Note

1. Press the Forms icon to insert a form. The Form templates screen opens displaying all the available forms.

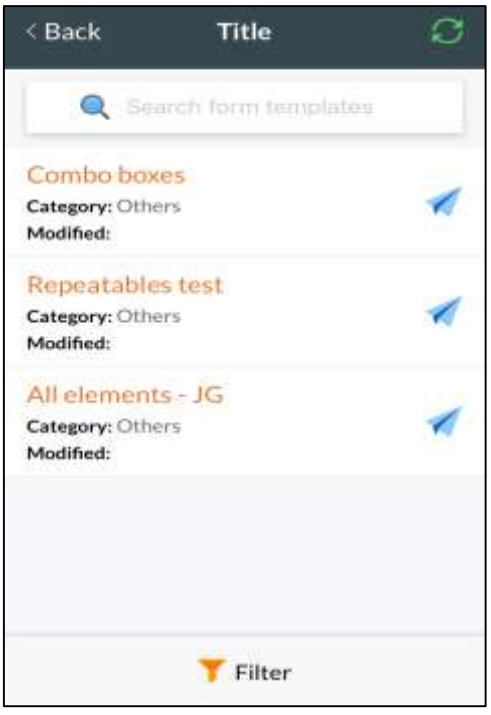


Figure 70: Select Form template

2. Select a form and enter the required details in the form.
3. Press the Send icon to save the form that you attached as a PDF file. The preview is displayed as shown below. Press the Share icon to share the file through mail. Press **Done** to return to the note.

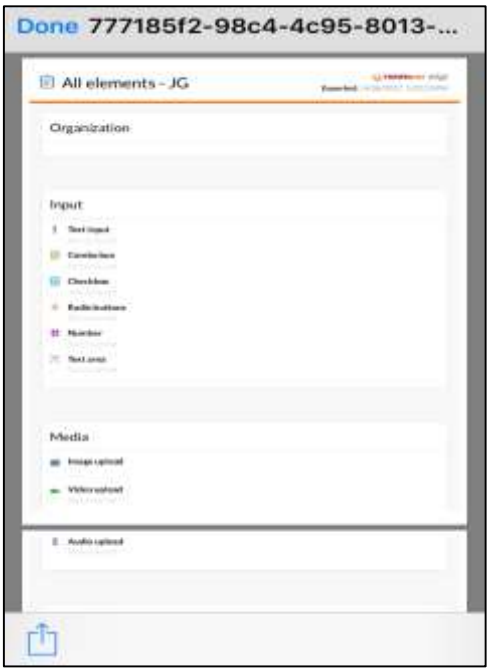


Figure 71: Form PDF Preview

4. Forms include repeating fields and field groups, validating fields for websites and emails, calculation fields, conditional fields, and barcodes. To repeat a field or field group, press the **Repeat** icon on the right side of the field.

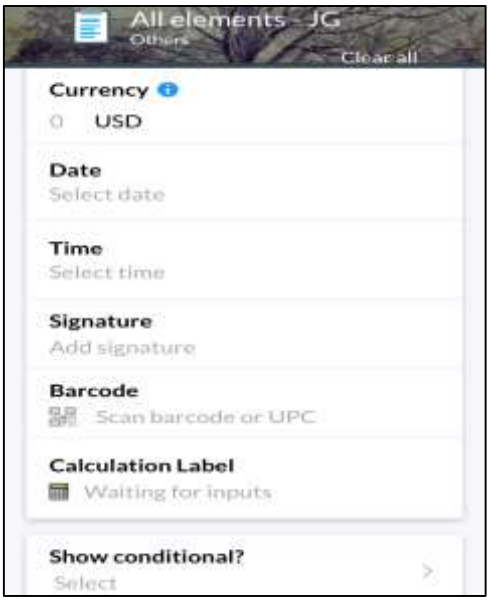


Figure 72: Enter details

5. For entering MAC addresses, you can either scan or enter the barcode manually in the **MAC Address** screen that opens.

6. If the scanned value does not match a MAC address, an alert message is displayed allowing you to **Rescan** or **Edit manually**.

   Note: This MAC address validation is done only if the MAC address field is set for MAC address validation for the selected form in the server, thus ensuring that the MAC address is not duplicated and is a 16-digit alphanumeric value and contains only 0-9 and A-F characters.

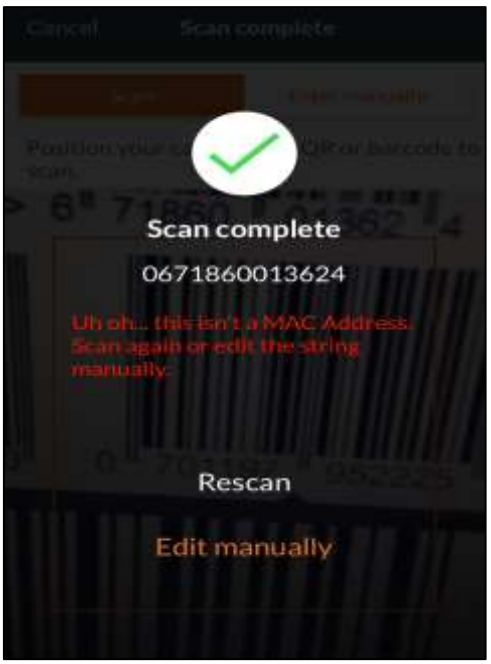


Figure 73: Invalid MAC address

7. If you choose to **Enter manually**, you will be prompted to enter a valid MAC address and then retype to confirm.

Figure 74: Enter manually

8. If you choose to **Rescan**, once the scan is complete, the scanned value is displayed.

9. Press **Done** to return to the form. The scanned value will be entered in the form.

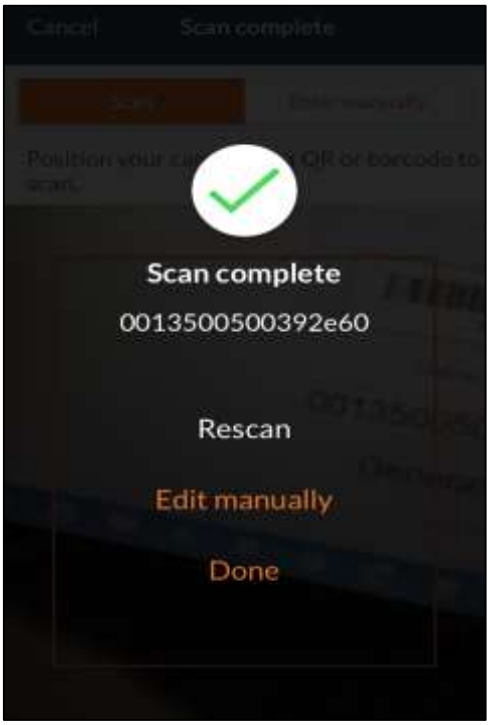


Figure 75: Scan complete

10. Press **Clear all** to delete all the details that you entered. Press **Cancel** to go back to the Note creation screen without attaching any form.

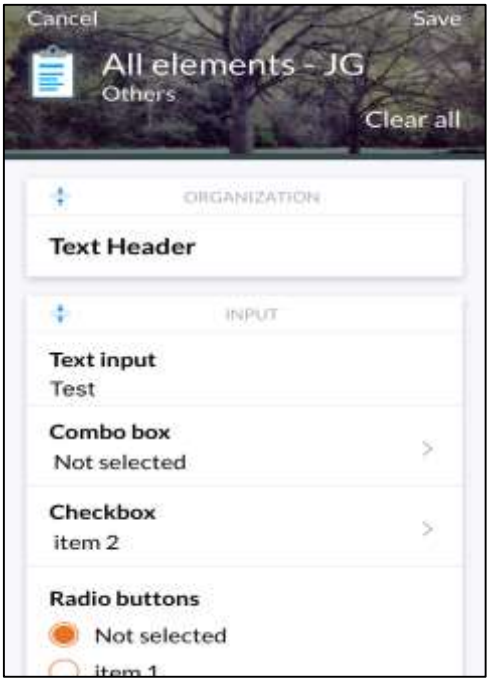


Figure 76: Enter form details

11. Press **Save** on the top right corner of the screen. You will return to the note creation screen. The form is now attached to the note.

Note: You can attach multiple forms or resources to a note.

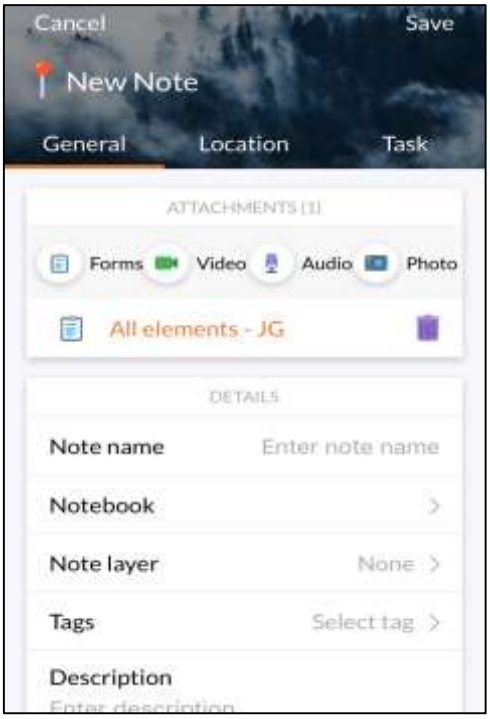


Figure 77: Form attached in a note

12. To attach another form or another resource, press the corresponding icon in the **Attachments** section.
13. To remove the form that you attached, press the **Delete** icon near the form.
14. Press **Save** to save the created note.

5.2. Adding Tasks

1. On the **Task** tab, toggle on the **Enable task** button.
2. In the **Due Date** field, select the due date for the task to be created.
3. In the **Status** field, select the status of the task from the following options:

    - **Completed**
    - **Assigned**
    - **In progress**

4. In the **Assigned to** field, select the user to who you want to assign the task.

Note: Once you assign the task, a notification is displayed in the device which is logged in by the assigned user. The user can specify in the settings if the notification should be displayed as an alert or as a banner.

When the user clicks the notification and if the device already has the task note, the Task note tab of the particular note opens. If the Task Note is not yet downloaded in the device, the following alert message is displayed: The task note is assigned to this Notebook. This Notebook has not been downloaded yet. Would you like to get it? Once the user clicks **'Download'**, the Notebook is and the downloaded task note in the Notebook is highlighted with the Notes list focused to it.

5. Press **Save**.

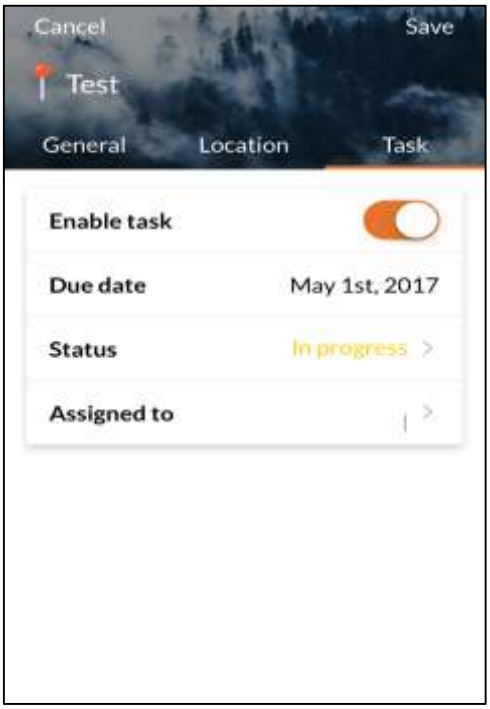


Figure 78: Tasknote

6. The note is now saved in the notebook that you selected.

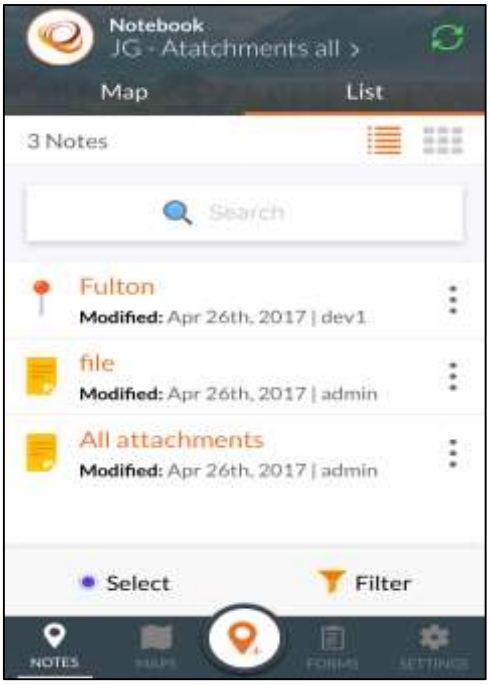


Figure 79: Note saved

5.3. Creating a Cloned Note

Using the clone option, you can create multiple notes with the same information.

1. Open the note that you want to clone, and press the **Make a copy** button at the top right corner.

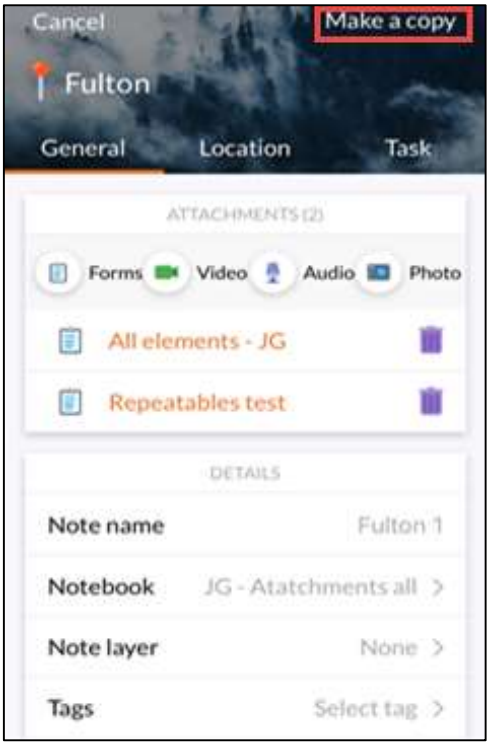


Figure 80: Make a copy

2. The note opens displaying all the information from the previously saved note such as note name, description, tags, and layer if applicable including the attached resources.
3. You can now enter the note name and add resources or location. Press the **Save** button to save the note.

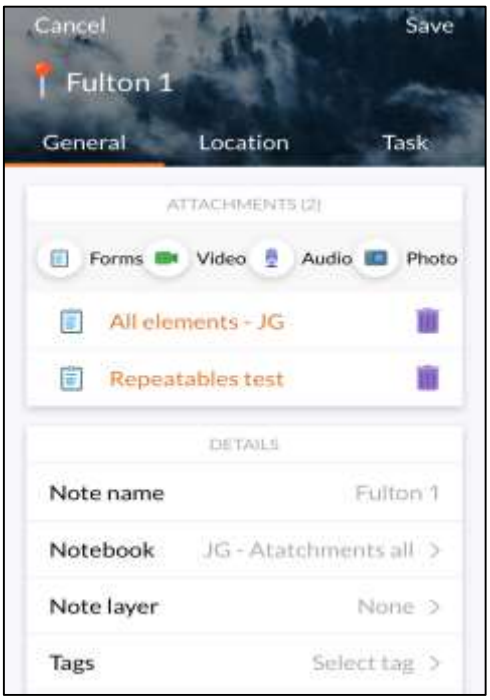


Figure 81: Creating a Cloned Note

4. All the notes that you created are displayed in the Notes section.

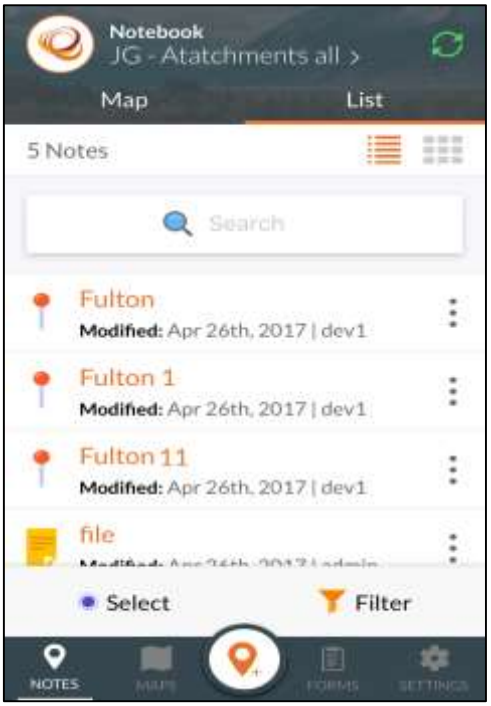


Figure 82: Notes

5.4. Creating a Quick Note

1. **Quick Note:** Press the Quick Launch Icon at the bottom center of the screen and select the **Quick note** option and press at the location where you want to create the quick note. **Note**: The Quick note option will be available only if it is enabled in the selected notebook.
2. This option allows you to create a quick note with the assigned form template in the respective notebook. Enter the details in the form template that opens and press **Save** at the top right corner of the screen.

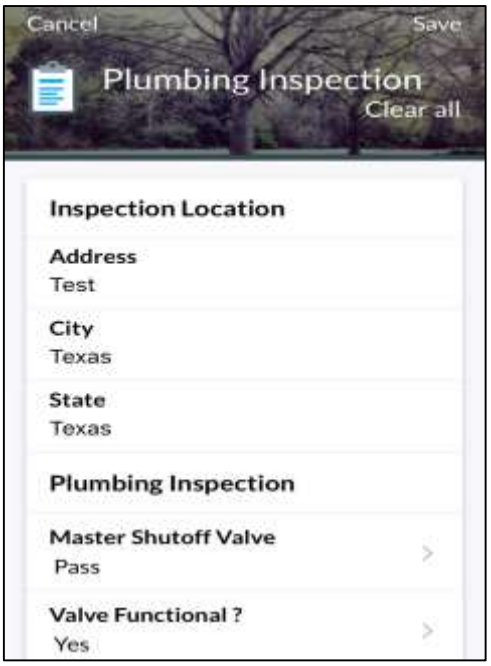


Figure 83: Form details

3. Your quick note is now created in the respective notebook with the note name as specified in the corresponding notebook settings.

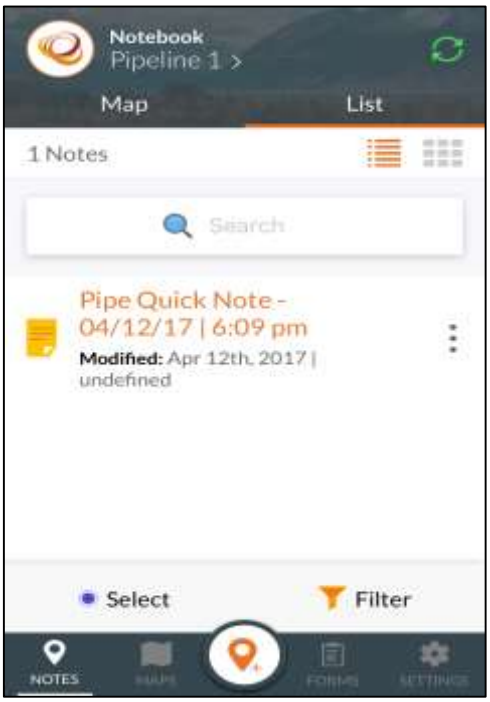


Figure 84: Quick note created

5.5. Creating a Form Note

Quick form notes are created with the assigned form template in the respective notebook.

1. To create quick form notes, select the **Notebook** in the Notebooks section.
2. Now, press the Quick launch icon and then the **Form** icon. The screen displays the forms assigned to the selected notebook.

Figure 85: Form list

3. Select the form template and enter the required details.

Figure 86: Form template

5. If the **Location proximity validation** is specified in the server and if the location proximity exceeds the specified value, a warning or restriction message is displayed. If the warning settings are specified, a warning message is displayed in yellow when your current location is further away from the note's location and exceeds the warning value. You can dismiss the message and save the form. Similarly, if the restriction settings are specified, a restriction message is displayed in red when your current location is further away from the note's location and exceeds the restriction value. You'll be restricted from saving the form details.

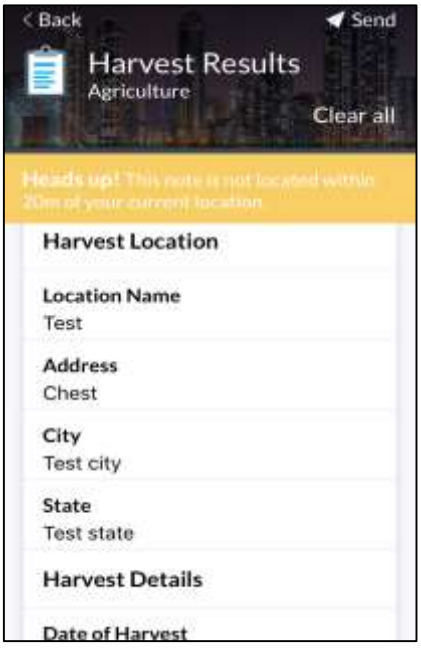


Figure 87: Location proximity - Warning

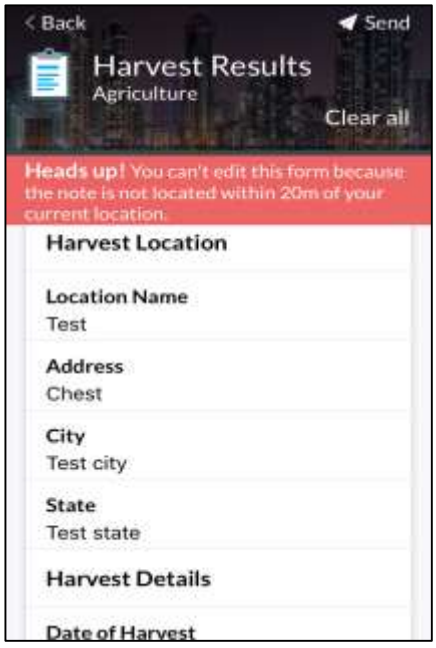


Figure 88: Location proximity - Restriction

6. For entering MAC addresses, you can either scan or enter the barcode manually in the **MAC Address** screen that opens.
7. If the scanned value does not match a MAC address or is already scanned and assigned for another fixture, an alert message is displayed allowing you to **Rescan** or **Edit manually**.

Note: This MAC address validation is done only if the MAC address field is set for MAC address validation for the selected form in the server, thus ensuring that the MAC address is not duplicated and is a 16-digit alphanumeric value and contains only 0-9 and A-F characters.

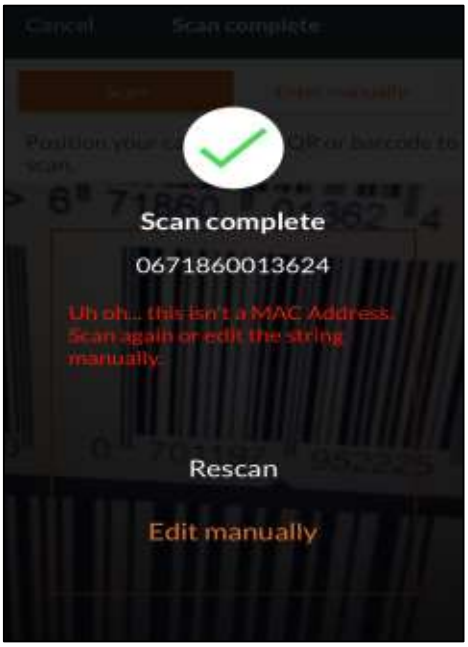


Figure 89: Invalid MAC address

8. If you choose to **Enter manually**, you will be prompted to enter a valid MAC address and then retype to confirm.

Figure 90: Enter manually

9. If you choose to **Rescan**, once the scan is complete, the scanned value is displayed.
10. Press **Done** to return to the form. The scanned value will be entered in the form.

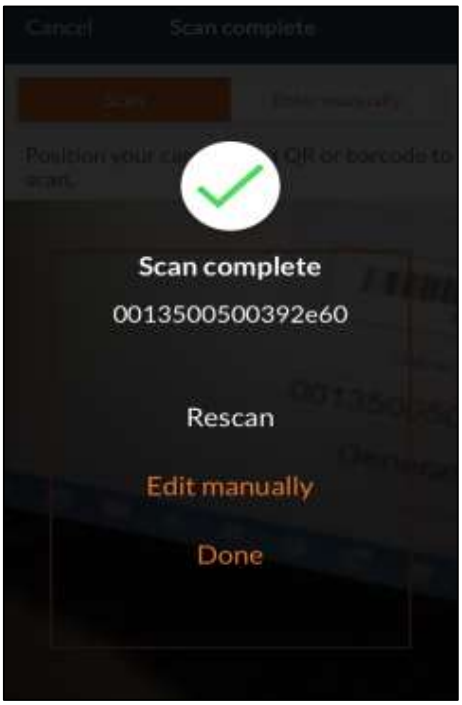


Figure 91: Scan complete

11. Press **Save** on the top right corner of the screen. You will return to the note creation screen. The form is now attached to the note. To remove the form that you attached, press the **Delete** icon near the form.
12. You can attach multiple forms or resources to a note. To attach another form or another resource, press the corresponding icon in the **Attachments** section.
13. Enter the Note name and other details such as location and task, if required.
14. Press the **Save** button to save the created note.

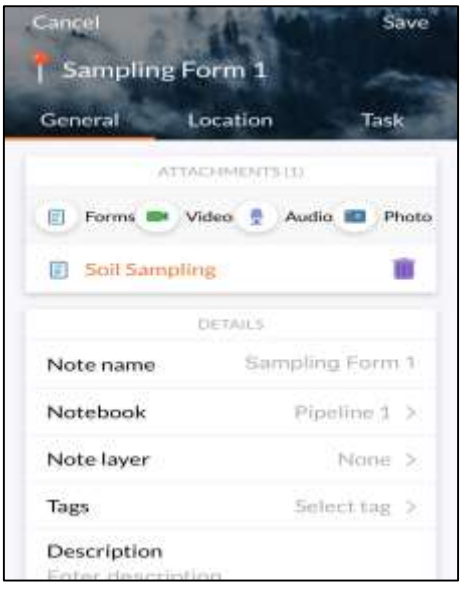


Figure 92: Form note

15. The note is saved in the Notebook that you selected.

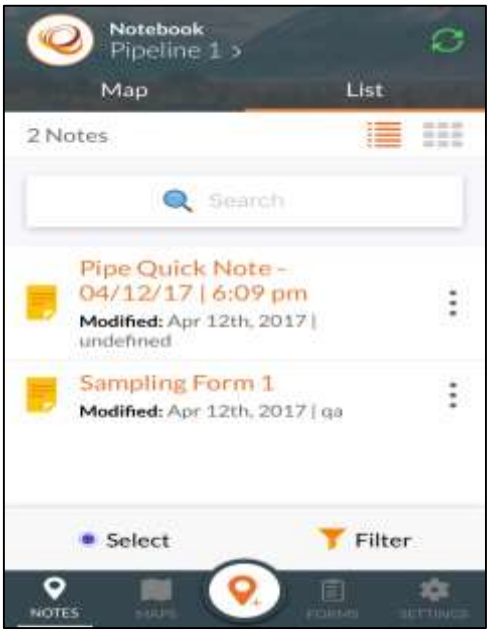


Figure 93: Form note created

5.6. Creating a Photo Note

1. Press the Quick Launch Icon at the bottom center of the screen and then the **Photo** icon.
2. In the popup menu that opens, you can either take a photo using the **Take Photo** option or you can use an existing picture from the library using the **Choose from library** option. To exit the popup menu, press the **Cancel** option.

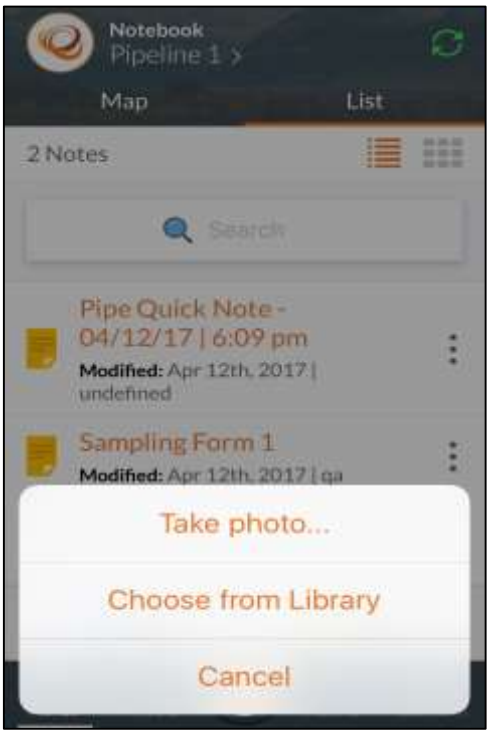


Figure 94: Photo

3. Once you take a photo, press **Use photo**. If you choose from library, select the photo. The Photo is now attached to the note. Click on the photo name to view the photo. A preview of the photo is displayed. You can attach multiple photos to a note. To attach another photo, press the Photo icon.

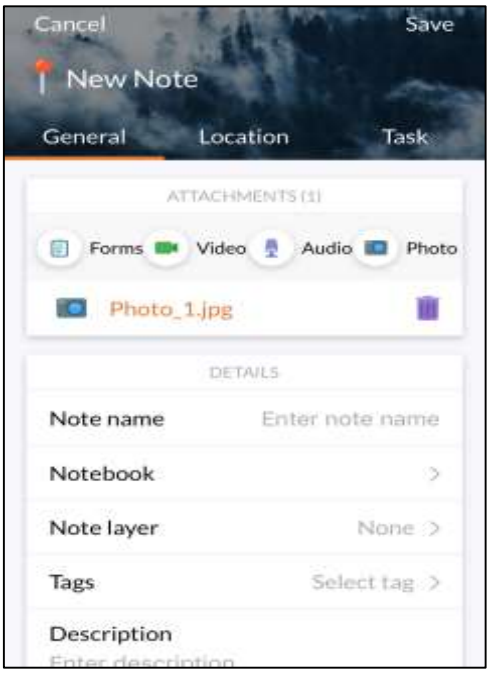


Figure 95: Photo attached in the note

- To view the details and the location coordinates of the photo, press the Details button.

Figure 96: Photo preview

- The **General** tab displays information such as orientation, image length and width, and model and make of the camera used. The **GPS** tab displays the location coordinates of the place the photo was taken. Press the Back button to return to the note.

Figure 97: Photo – General & GPS Details

5.7. Creating a Point Note

11. Press the Quick Launch Icon at the bottom center of the screen and then the **Point** icon. The Map view opens displaying a pin marker at your current location.
12. If you want to mark your current location, on the **Capture** tab, press the **Capture** button. Press **Done**. You will be redirected to the note creation screen.

Figure 98: Point - Capture

13. Or, if you want to tap somewhere else on the map, on the **Draw** tab, press the **Tap** icon. The Target and Drop options are displayed. With the Target icon selected, the location coordinates of your location are displayed. You can press the Drop icon anywhere you want and a pin marker will be dropped at that point. Press **Done**. You will be redirected to the note creation screen.

Figure 99: Point - Drop

14. If you do not want the location coordinates displayed, press the Target icon, which will enable the Tap icon and disable the Target icon. You can tap anywhere on the map and a pin marker will be dropped at that point. Press **Done**. You will be redirected to the note creation screen.

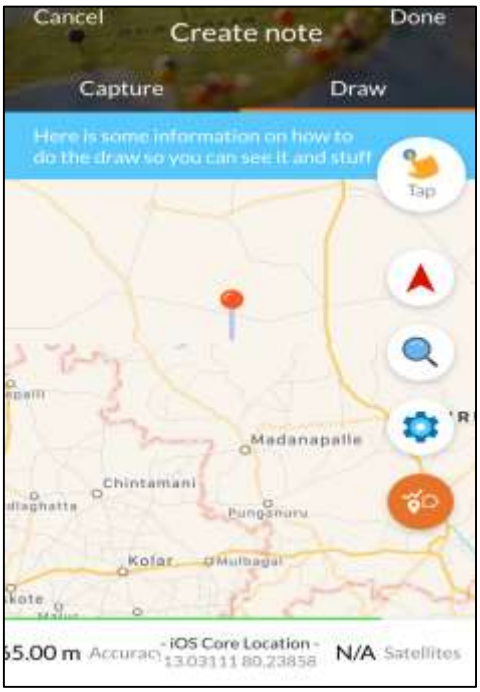


Figure 100: Point - Tap

15. The Location tab displays the coordinates for the point that you selected. Enter the note name and add required resources and press Save. Your note is now created.

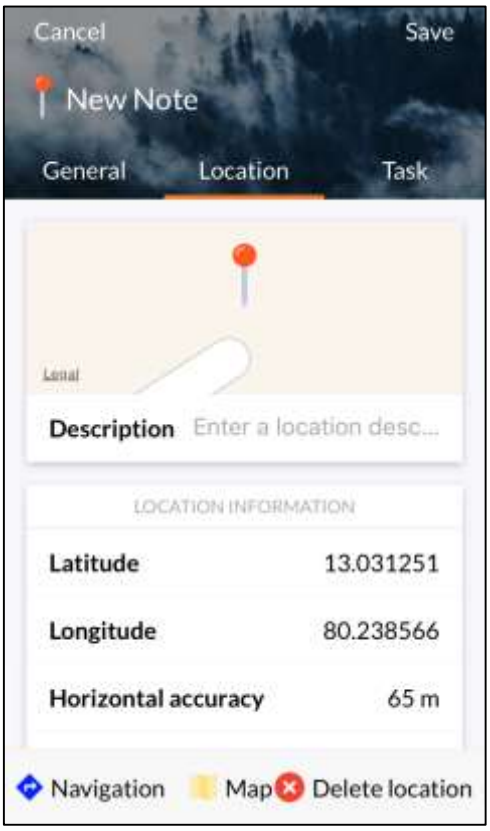


Figure 101: Location coordinates

Note: A warning message is displayed if the accuracy is between the specified warning threshold and the restriction threshold, and you will be restricted from capturing the location if the accuracy exceeds the restriction threshold specified in the Location Services Settings.

For example, if the warning threshold is set at 5 meters and the restriction threshold is set at 10 meters, a warning message is displayed if the accuracy is anywhere between 5 and 10 meters and a restriction message is displayed if the accuracy exceeds 10 meters.

5.8. Creating a Polyline or Polygon Note

Before you start recording, toggle on the buttons in the Visibility Options under Measurements in the **Settings** menu to measure the distance of the lines or the area of the polygons that you draw.

16. Press the Quick Launch Icon at the bottom center of the screen. If you want to create a polyline, select the **Line** icon or if you want to create a polygon, select the **Polygon** icon. The Map view opens displaying a pin marker at your current location.
17. On the Record tab, press the **Start** button to create lines and polygons tracking your moves. Once you start recording, vertices are created after you cover the distance specified in the Location Settings, based on the refresh rate interval. The distance between each vertex is displayed in the unit that you specified

in the settings. If you leave the Record screen, the recording is paused. You can pause and resume your recordings by pressing the Pause button.

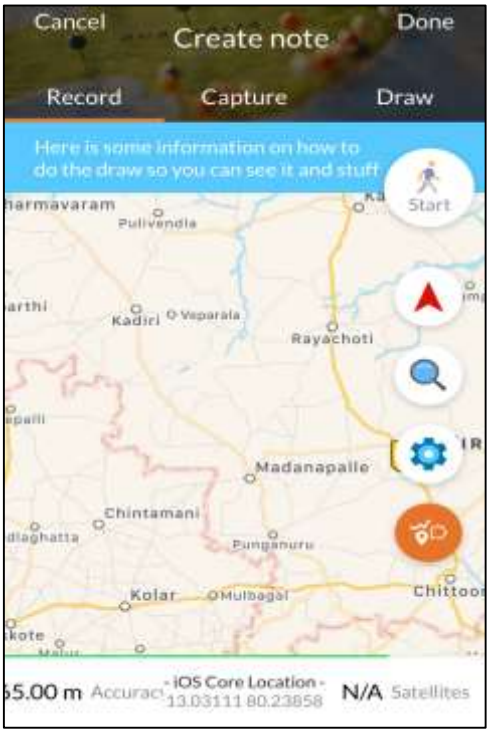


Figure 102: Start recording

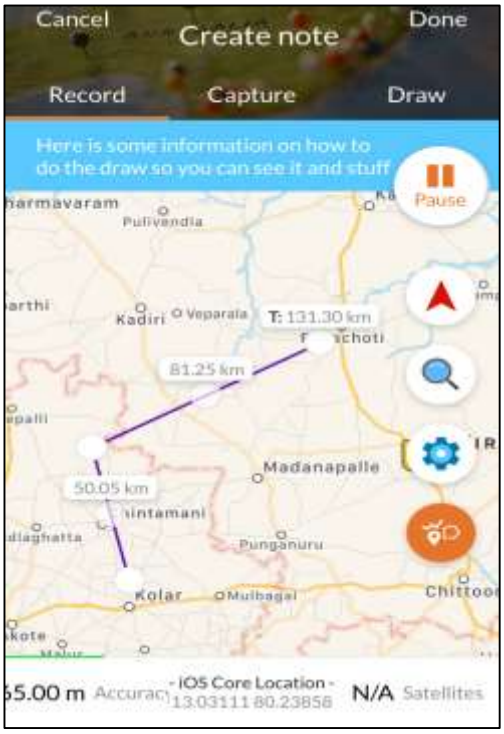


Figure 103: Pause recording

18. To capture your current location during recording, on the **Capture** tab, press the **Capture** button. A vertex is created at your current location. You can then resume your recording on the **Record** tab.

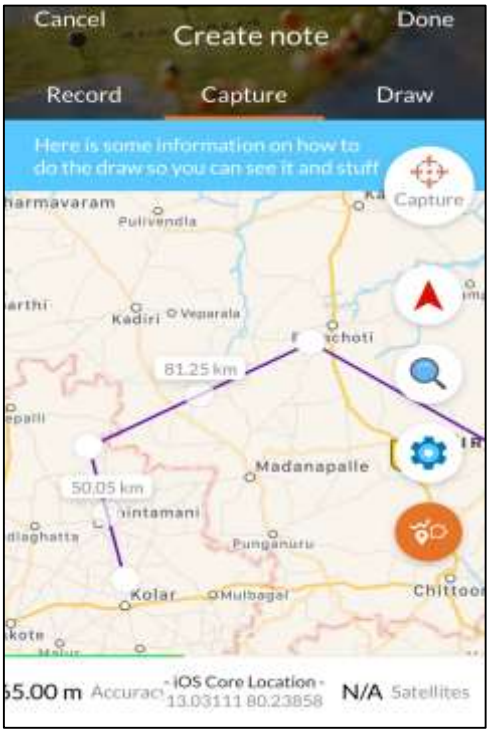


Figure 104: Capture

19. You can also draw a line or polygon using the **Tap** icon on the **Draw** tab by tapping on the map where you want. If the Target icon is on, the location coordinates of the vertices are displayed on the map. You can then resume your recording on the **Record** tab.

Figure 105: Drop

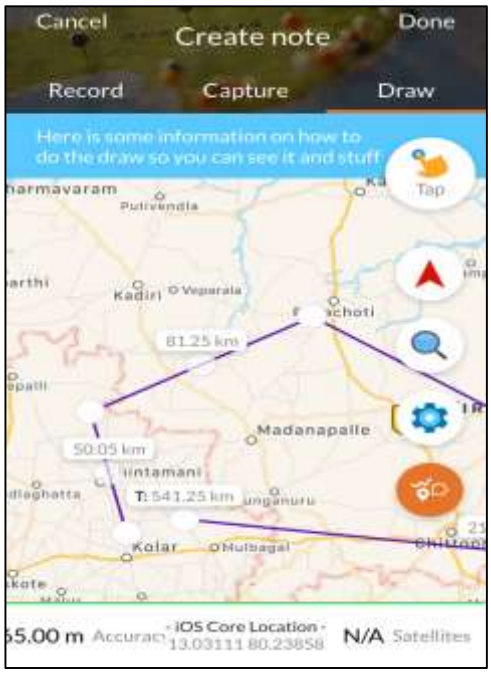


Figure 106: Tap

20. Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. If it is a polygon, the area and the perimeter of the polygon is shown. Press Back to go to the Note creation screen.
21. The coordinates for the vertices created during your recording are displayed on the Location tab.
22. Enter the note name and add required resources and press Save.

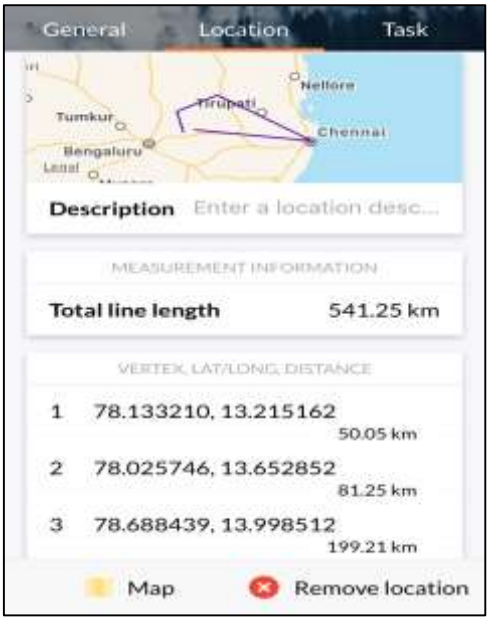


Figure 107: Location coordinates

6. Notebooks

6.1. View Notebooks

1. Press the **Notebook** section on the top section of the screen. The **Notebooks** list view opens displaying the list of notebooks available in the server with the Download icon, along with the notebook name, count of notes inside, created by and modified timestamp details. The device syncs automatically with the server every minute.
2. To download a notebook, press the download icon. The progress bar will show the download status of each resource in the notebook in the order of form templates, maps, map overlays, and notes along with the number of resources that are downloaded. Press the cancel icon to stop downloading. All the notes that were downloaded until you cancelled the downloading will be discarded.

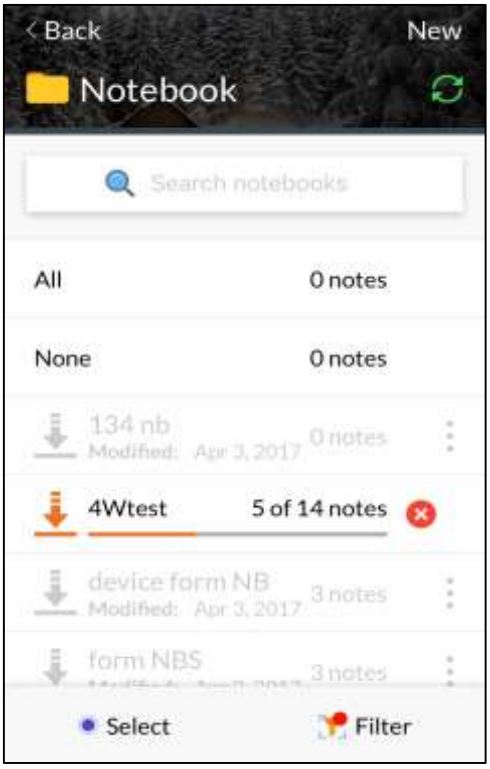


Figure 108: View notebooks

3. To create a new notebook, press the **New** button at the top right corner of the screen. You will be directed to the **Create Notebook** screen.
4. You can view only the notebooks that you have been granted access to. If the access had been denied after you downloaded a notebook, a red access restriction icon is displayed near the notebook indicating that you have been denied access to that notebook. Any changes that you make in the notebook will not be synced with the server after the access has been denied.
5. When you press on a notebook name, the notebook is selected and the notes, forms, and maps of the selected notebook are listed.

6. In the **Search notebooks** field, you can search by entering the name of the notebook that you want to view.

23. To share or delete a notebook, press the settings icon on the right side of the corresponding notebook. In the Tab view, press the icons:

    - **Send**: Press this icon to share the notebook with other users through mail and export the notebook with the notes into a geopackage file. The file is exported as a zip file in your local drive.
    - **Remove**: Press this icon to delete the selected notebook. Press **Ok** in the confirmation dialog box.

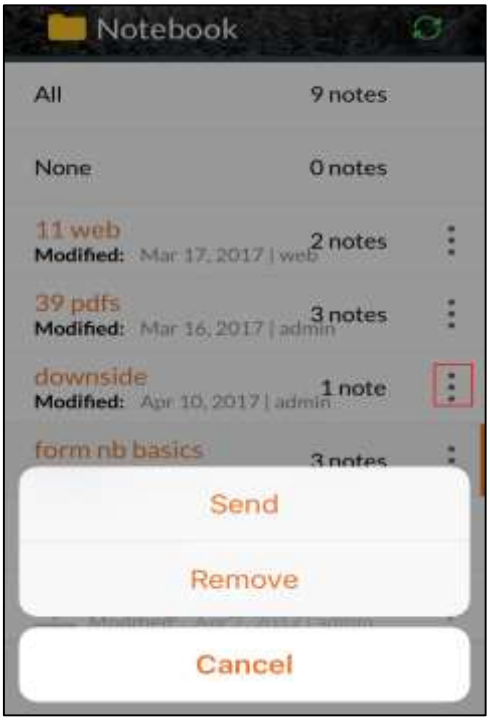


Figure 109: Notebook Share/Delete

7. To delete multiple notebooks, press the **Select** option, select the required notebooks, and then press the delete icon.

8. The **Filter** icon allows you to filter and sort the notebooks. In the **Sort** dropdown, you can select the parameters from the following options, based on which the notebooks will be displayed:

    - Notebook name
    - Modified date
    - Created by
    - # of notes

24. You can use the Filter options to filter the records based on:

    - Modified date
    - Created by

6.2. Creating a Notebook

1. Press the **Notebook** section on the top section of the screen. You can view all the notebooks that were recently updated or created.
2. To create a new notebook, press the **New** icon at the top right corner of the screen. The Notebook creation screen opens.
3. On the **General** tab, enter the **Name** and **Description** for the notebook to be created.

Figure 110: Create Notebook - General

4. On the **Maps** tab, you can view the list of available maps. Toggle on the maps that you want to attach to the notebook. You can attach multiple maps to the notebook.

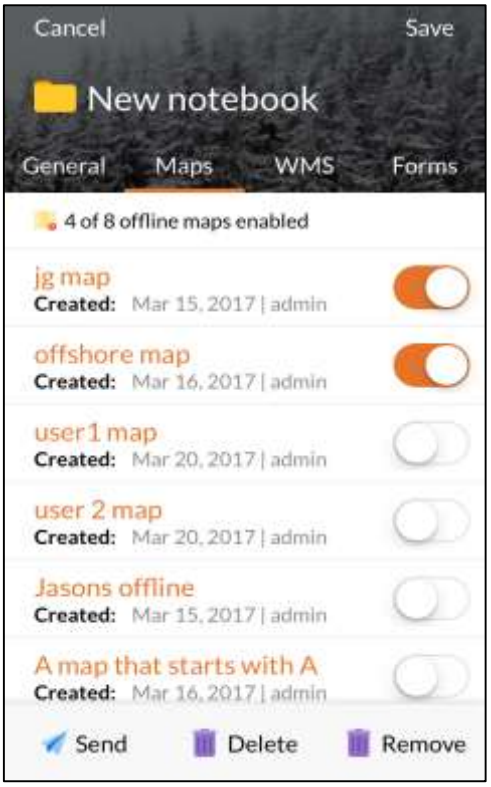


Figure 111: Create Notebook - Maps

5. On the **WMS** tab, from the list of existing map overlays, toggle on the map overlays that you want to attach to the notebook. You can attach multiple map overlays to the notebook.

Figure 112: Create Notebook - WMS

6. On the **Forms** tab, toggle on the forms that you want to attach to the notebook. You can attach multiple forms to the notebook.

Figure 113: Create Notebook - Forms

7. Press the **Save** button on the top right corner to save the notebook with the attached forms, maps, and map overlays.

7. Settings – Location & Measurement

Press the Settings icon on the lower right of the screen to view the following options that display your server connection settings and allow you to modify location settings and import map files.

1. **Server:** The Status of your connection with the server is displayed along with the server to which you are connected. The date and time of the last sync is also displayed here.
2. **Storage:** The total storage available in your device is displayed here.
3. **Logout:** Press this option to log out of the app.

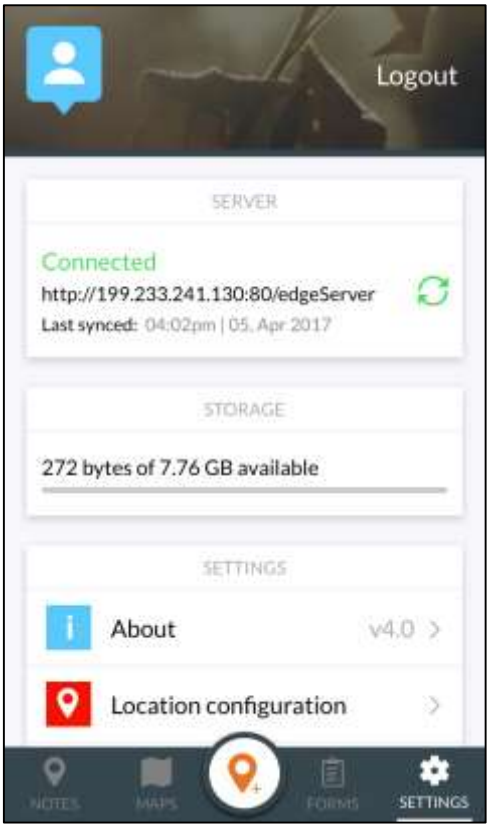


Figure 114: Settings

7.1. Modify Location Settings

1. **About:** Press here to see the version number of TerraGo Edge installed in your device and related documents such as the Terms of Use, End User License Agreement, Support, and Feedback request.

Figure 115: About

2. **Location Configuration:** You can specify location and measurement settings here.

Figure 116: Location Configuration

- **CONNECTED LOCATION PROVIDERS:** The iOS/Android location services and any third party external GPS devices (such as Bad Elf, SXBlue, Trimble, etc.) that you have paired using Bluetooth services are displayed here. Toggle on the location service providers to determine your location. Based on the accuracy of the data provided, Edge will either use the standard location service or the third party GPS device data.

  You can connect external GPS devices to your iPad or iPhone via Bluetooth and this overrides the GPS on the device to capture high accuracy location data. Some of the third party external GPS devices that Edge supports are:

  - Bad Elf
  - CHC
  - EOS
  - SXBlue
  - Trimble

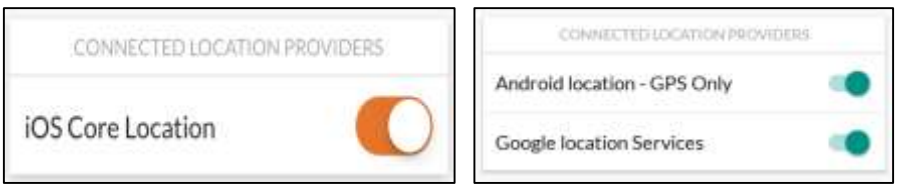


Figure 117: Location Providers

- **LASER RANGEFINDERS:** Any laser rangefinders (such as LTI True Pulse 360B, etc.) that you have paired using Bluetooth services are displayed here. If this **Enable laser rangefinders (LRFs)** button is toggled on, Edge will use the paired device to capture the location data.

  Note: Since the LTI True Pulse 360B Laser rangefinder is a non-iOS GNSS receiver, the NMEA-BT adapter from Aman Enterprises (which connects to the iOS devices wirelessly using the native Bluetooth built into the iOS devices) will enable you to connect the Laser rangefinder with a serial port to the iOS devices.

Figure 118: Laser rangefinders

3. **DEVICE CONFIGURATIONS:**

Figure 119: DEVICE CONFIGURATIONS

- **Auto record interval:** You can specify the distance between two points after which a vertex will be created depending on the refresh rate interval specified, while autorecording.
- **Coordinate display:** You can specify the format in which the coordinates should be displayed:
  - **DDD.DDDDD** (Decimal degrees)
  - **DDD MM SS.S** (degrees, minutes, decimal seconds)
- **Proximity alert:** If this button is toggled on, a proximity alert message with sound and vibration is displayed when the user's current distance from the selected note's location point is less than or equal to the defined proximity distance, which is the close proximity area.
- **Proximity alert distance:** You can specify the close proximity alert distance here. This is the distance at which an alert saying "You're almost there" is displayed to the user for 3 seconds when the user's current distance is less than or equal to the defined proximity distance from the selected note's

location point. When the user is in the close proximity area, the line, distance, and direction are displayed in green color, after which it changes to blue when the user leaves the close proximity area. By default, the alert distance is set to 5.

4. **SERVER CONFIGURATIONS:** These fields display the settings specified in the server.

    - **Location proximity validation:** The location proximity warning or restriction threshold, specified in the server for location proximity of form notes in meters, the value of which when exceeded, will display a warning to the user or will restrict you from saving the form details. For example, if you open a form when the warning threshold is set at 20 meters, a warning message is displayed in yellow if your location proximity exceeds 20 meters. Similarly, if the restriction threshold is set at 20 meters, a restriction message is displayed in red if the location accuracy exceeds 20 meters.
    - **Poor accuracy warning:** The warning threshold, specified in the server, which when exceeded but less than the restriction threshold, will display you a warning. For example, if the warning threshold is set at 5 meters and the restriction threshold is set at 10 meters, a warning message is displayed if the location accuracy is anywhere between 5 and 10 meters.
    - **Poor accuracy restriction:** The restriction threshold, specified in the server, which when exceeded, will restrict you from capturing the location. For example, if the restriction threshold is set at 10 meters, a restriction message is displayed if the location accuracy exceeds 10 meters.
    - **GPS refresh rate interval:** The Refresh rate interval field displays the rate interval settings specified in the server at which the location data is provided to the Edge app.

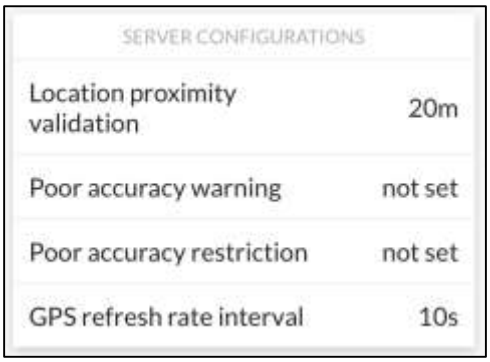


Figure 120: Server configurations

5. **User Locator:** This option will allow you to show or hide your location on the map view. If the **Share my location** button is selected on, your location is shared with all users and your device is synced with the server every two minutes. If **Off**, your location is not shared with the server and your status is displayed as **Deactivated** in the map view. If for any reason, your device does not sync with the server for more than 5 minutes, you will appear **Offline**. If you do not enable this option to show your location, your device status will be displayed as **Deactivated**.

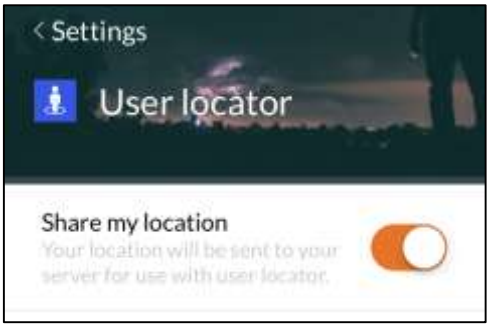


Figure 121: User Locator Settings

7.2. Modify Measurement Settings

1. You can specify the measurement settings here. You can select the Measurement type as **Static** or **Dynamic**.

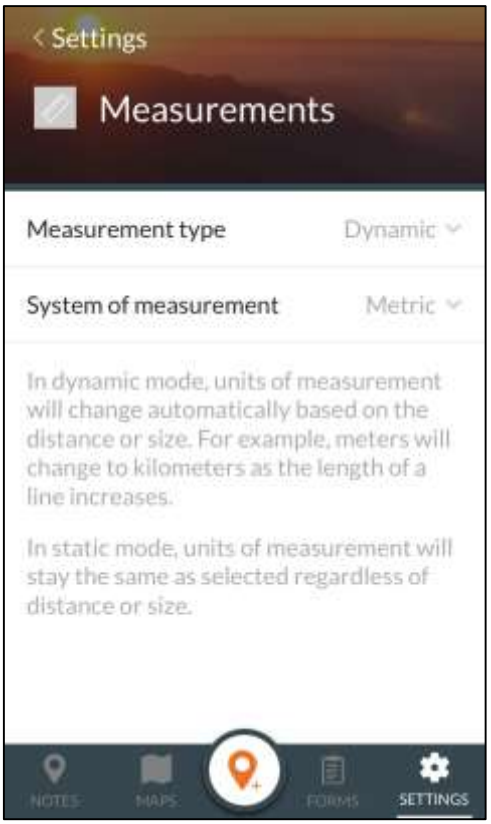


Figure 122: Measurement settings

2. **Dynamic:** When you select **Dynamic** mode, the measurement unit will change dynamically based on the region that you are in. You can still change the system of measurement to Metric or Imperial. The settings you make will take into effect, irrespective of the region based settings. Also, when you are measuring larger distances, the measurement unit will change after a particular distance.

   For example, if you have selected imperial system, distances less than 1320 feet will be displayed in feet after which in miles, areas less than 6969600 square feet will be displayed in feet after which in square miles, and time will be displayed in minutes. Similarly, if you have selected metric system,

distances less than 250 meters will be displayed in meters after which it will change to kilometers, areas less than 250000 square meters will be displayed in square meters after which in square kilometers, and time will be displayed in minutes.

- **System of measurement:** Select the system of measurement from the following options:
    - **Metric**
    - **Imperial**

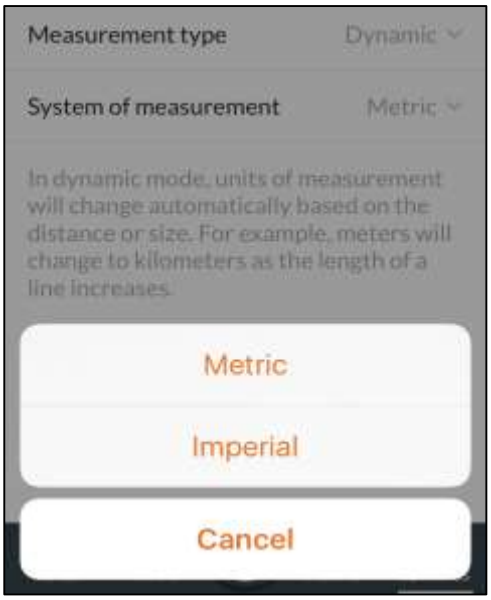


Figure 123: Dynamic - System of measurement

3. **Static:** When you select **Static** mode, the measurement unit will remain the same as you specify in the distance units or area units, irrespective of the region that you are in. If you select Static, you can specify the distance units and area units as follows.

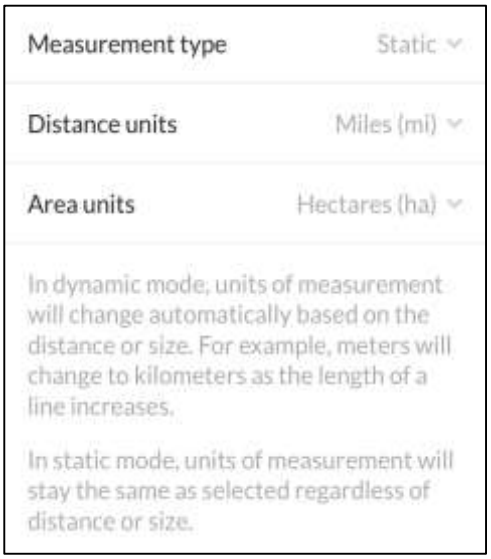


Figure 124: Static mode

- **Distance units:** You can select the unit of the distance here.

- **Meters (m)**
- **Kilometers (km)**
- **Feet (ft)**
- **Miles (mi)**
- **Time (s)**

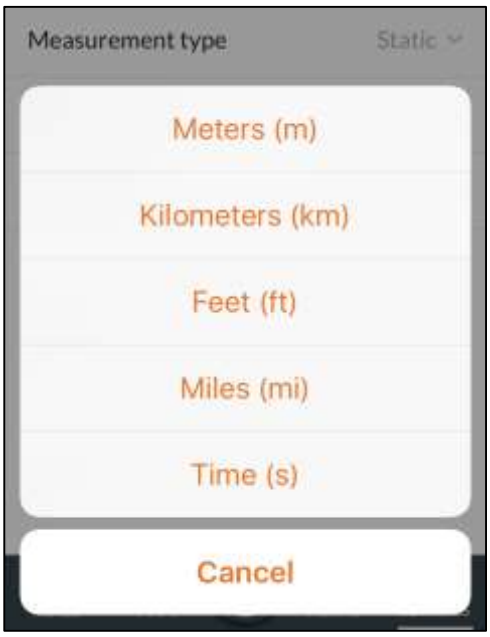


Figure 125: Static mode - Distance units

Note: If you select the distance unit as Time and then create a polyline or polygon, the time taken to travel between two vertices is calculated by dividing the distance travelled by the user (meters) by average walking speed (5.0 kilometers per hour or about 3.1 miles per hour)

- **Area units:** You can select the unit of the area here.
  - **Square meters (m2)**
  - **Hectares (ha)**
  - **Square kilometers (km2)**
  - **Square feet (ft2)**
  - **Acres (ac)**
  - **Square miles (mi2)**

Figure 126: Static mode - Area units

8. Importing GeoPDF / Geopackage / Raster Files

You can import geoPDF files with single or multiple geopackages and also raster. When you import a file, the notes will be created in the notebook that you specify.

When you select a geoPDF file with multiple geopackages, select the geopackage file for which you want to create the notes and then click Continue.

1. To import an offline GeoPDF, a Geopackage or a Raster file, open the file using TerraGo Edge.

Figure 127: Opening Geopackage file

2. In the Notebook field, select the notebook into which you want to import the PDF or the geopackage file or create a new notebook by selecting the New button.
3. If you want to import only the map or the raster or the features and feature classes, toggle on the **Import Map**, **Import Raster**, or **Import features & feature classes** buttons.

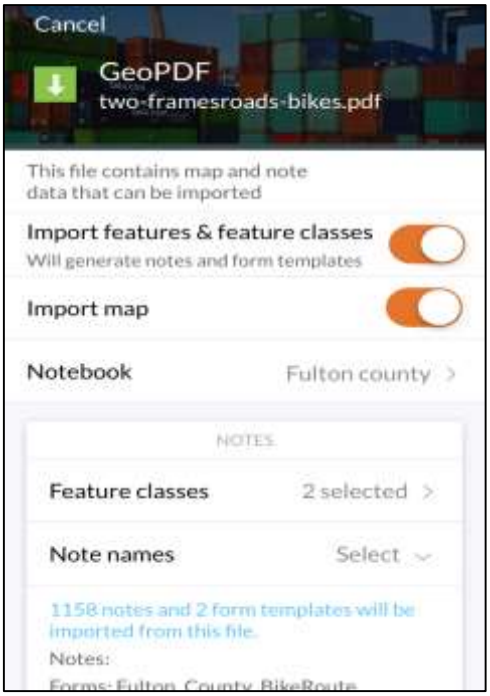


Figure 128: Import Map / Features

4. If you are importing a file with only notes or maps, only the respective data is shown and you will not be able to toggle on the **Import Map**, **Import Raster**, or **Import features & feature classes** buttons.

Figure 129: Importing GeoPDF

5. Under the **Notes** section in the **GeoPackage Names** field, if the file has multiple geopackages, you can select the geopackage that you want to import. Based on the geopackage that you select, the corresponding feature classes and number of notes are displayed.

Figure 130: Select Geopackage

6. In the **Feature classes** field, select the feature classes that should be imported.

Figure 131: Feature Classes

7. You can specify the note name using the following options:

- **Attribute:** Based on the feature classes selected, the corresponding attributes are displayed. The note layer will be based on the feature class and the note name will be based on the attribute.
- **Feature ID:** If you choose this option, the notes are named based on the fields in the geopackage.
- **Feature class name:** If you select this option, the note layer will be based on the feature class. The number of notes and the form templates that will be created is displayed.
- **Custom Name**: You can enter a custom name for the notes. The notes are named with a number added to the custom name that you enter.

Figure 132: Note name

8. Press the Import button on the top right corner of the screen.
9. The progress of the map import process is displayed as shown below:

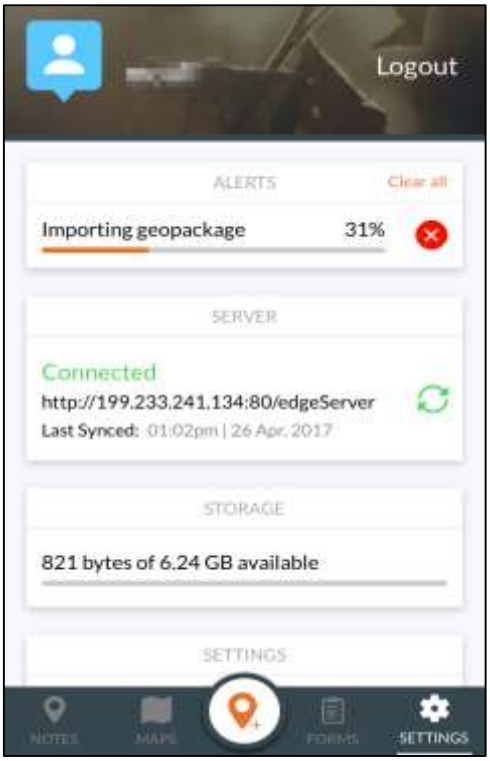


Figure 133: Map import progress

10. Once the map import process is complete, a notification is displayed. A notebook with the converted map will be created and downloaded. You can view the map in the Maps section.
11. If you are importing a Geopackage file, the progress of the notes import process is displayed in the notebooks list view.

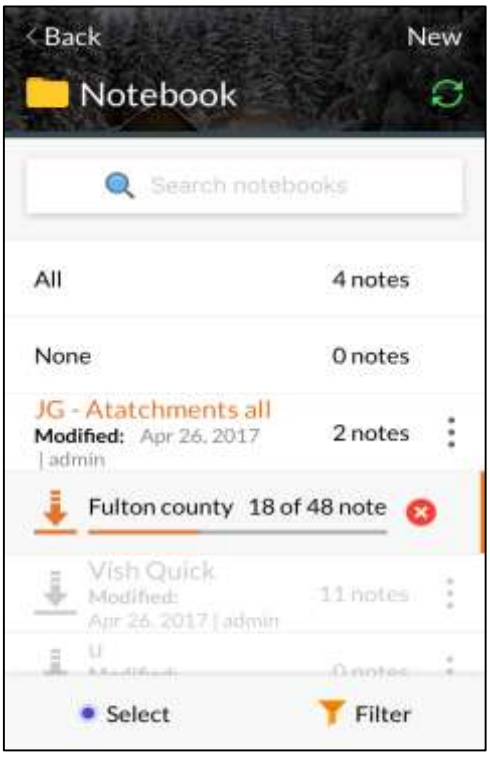


Figure 134: Note import progress

12. Once the process is complete, a notebook is created with the notes as shown below:

Note: You can import only one file at a time. You can import the next file only after the current import process is complete.

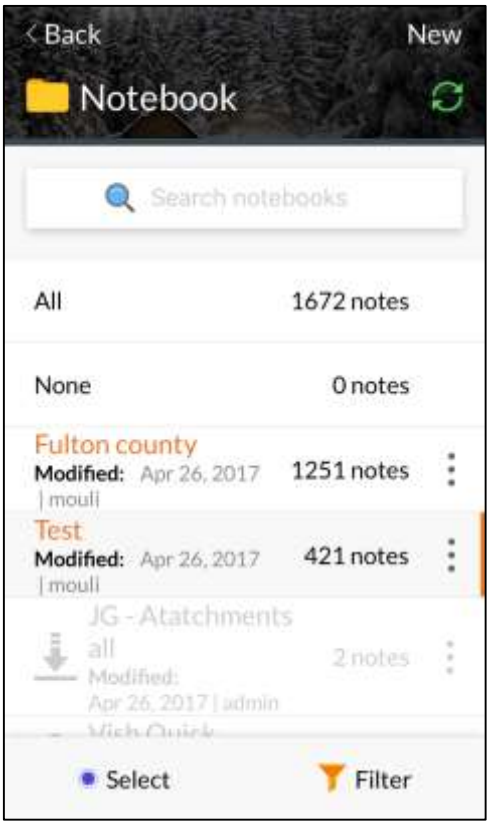


Figure 135: Notebook created

iPad / Tablet

Trial Version

You can now try all the advanced features of TerraGo Edge as a free user with limitations in just sharing and syncing data with the server.

If you like the product and decide to buy the Edge license, all you need to do is purchase one online and enter the Product Key to activate the fully functional version. You do not need to uninstall the trial version or install anything extra. Once you activate your license, all your data that you created in the device as a free user will be synced with the server and updated with the username that you use after the product license activation.

Note: Once you activate your license, you will not be able to login in as a free user then.

1. Once you install the TerraGo Edge application from the Apple Store or Play Store, the application opens displaying the Login screen.
2. Press the **USE FOR FREE** button.

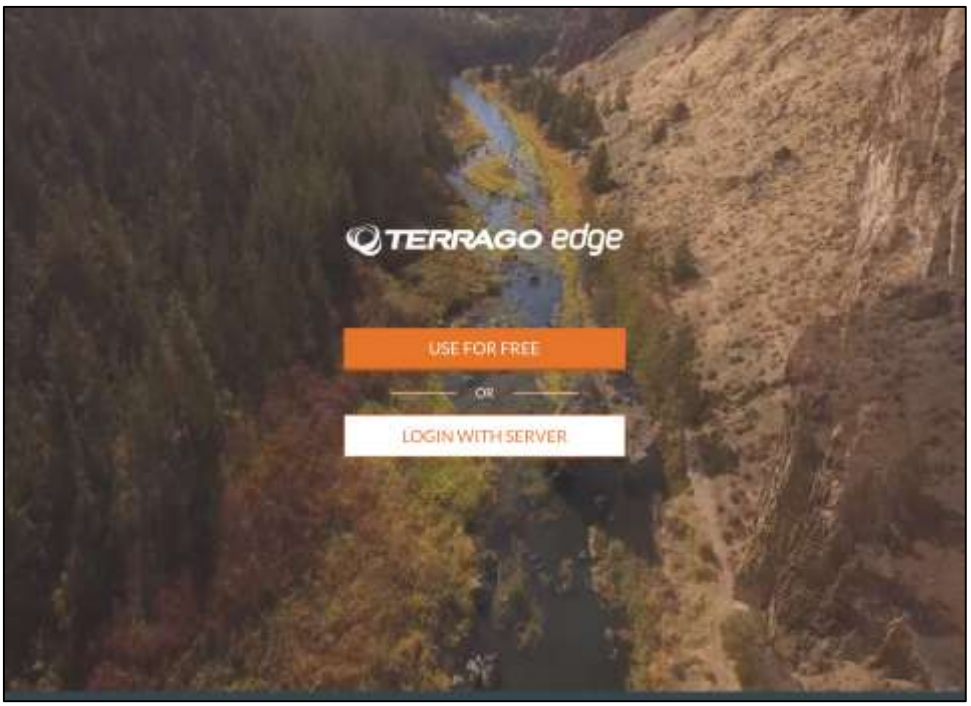


Figure 136: Free User Login

3. Enter your email address and press the **GET STARTED** button.

   Note: To continue without entering the email address, press **Skip** on the top right corner of the screen.

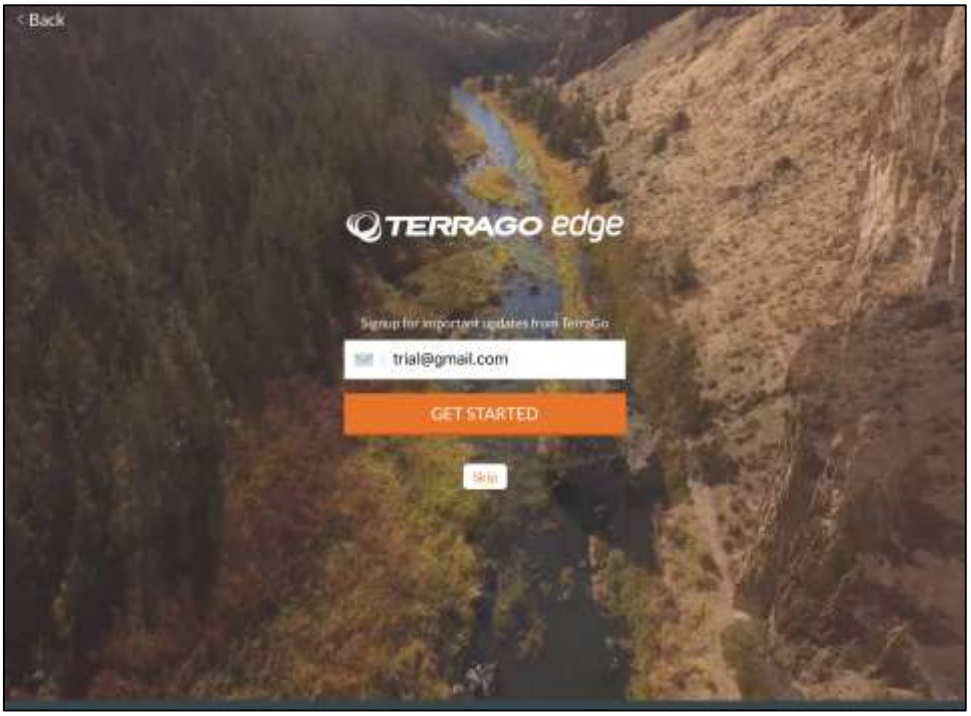


Figure 137: Email address

4. The **Map** view of the **Notes** opens as shown below displaying a pointer at your current location:

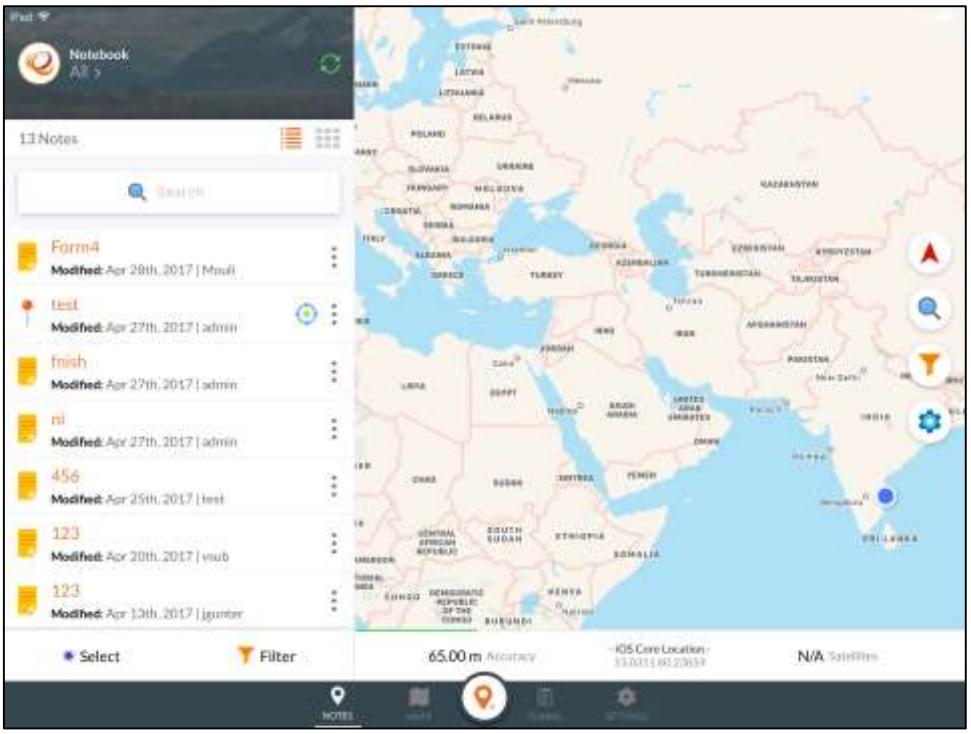


Figure 138: Edge

Logging In

A license key is sent to the email address that you registered for each device that you add. You will also receive a separate mail with the account and password details.

1. Once you install the TerraGo Edge application from the App Store, the application opens displaying the Login screen.
2. Enter the server address, username, and password given in the Account Details mail.
3. Enter the authorization code generated for the device.

-or-

4. To launch the application the first time after installation, tap on the **license.lic** file attached in the email and open with TerraGo Edge. The application now opens displaying the Login screen with the server details, user name, password, and authorization code autopopulated.

Figure 139: License Mail

5. Enter the password given in the Account Password Details mail that you received.
6. Press the **LOGIN** button to continue. The **Map** view of the **Notes** opens displaying a pointer at your current location.

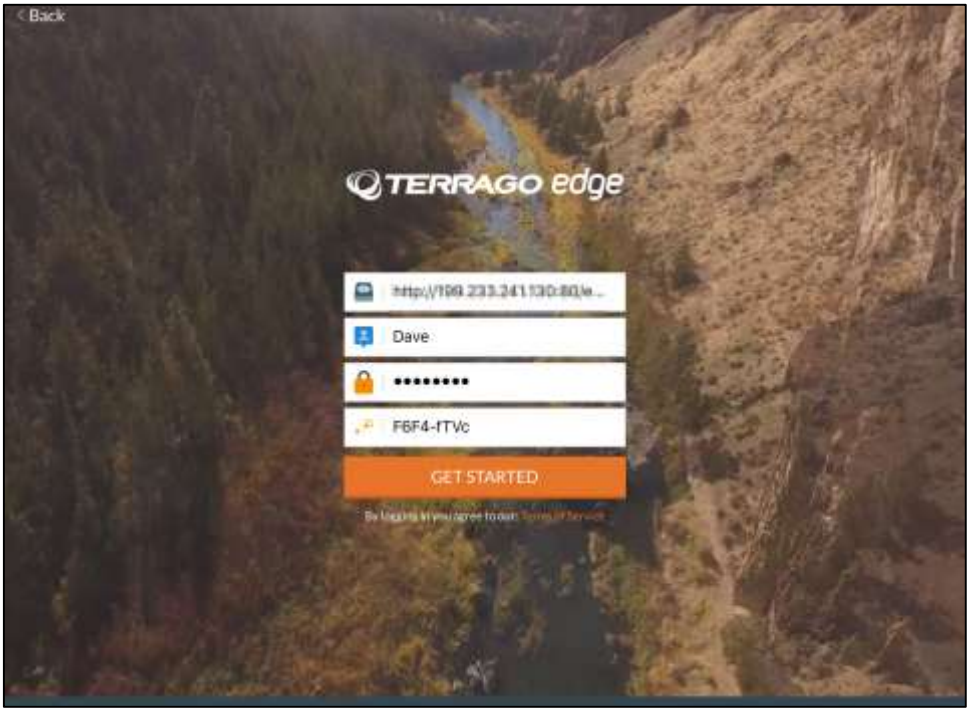


Figure 140: Login Screen

1. Home

1. Once you log in, by default, the screen displays the map view of all the notes and a pointer icon is displayed at your current location. The Notes list view and tab view are displayed on the left panel.
2. The action bar at the bottom of the screen displays the Notes, Maps, Forms, and Settings tabs with the Quick Launch icon at the center.

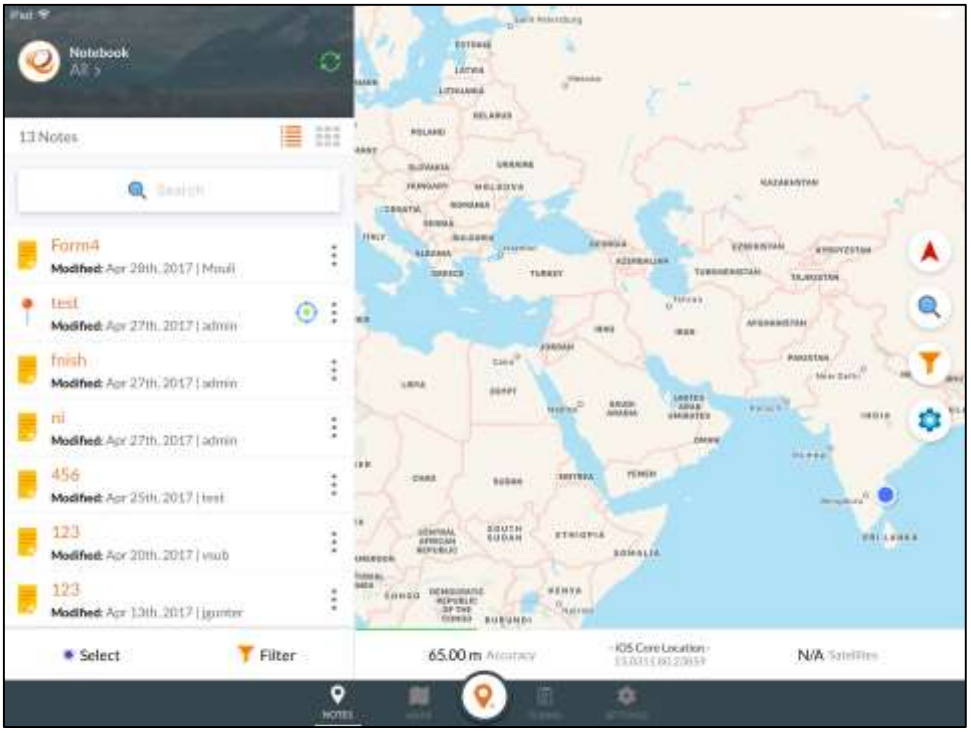


Figure 141: Notes Map View

3. Press the Quick Launch Icon at the bottom center of the screen to create new notes.

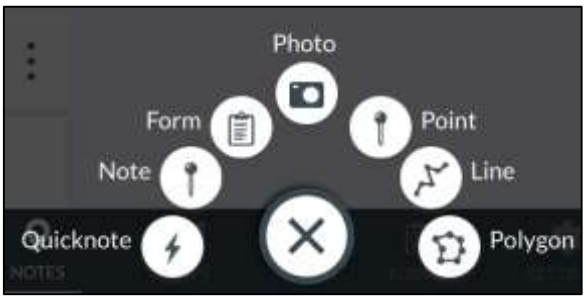


Figure 142: Quick Launch

4. Using the options, you can:

- Create a quick note
- Create a note
- Create a form note
- Create a photo note
- Create a point note

- Create a line note
- Create a polygon note

2. View Notes

The Notes list view on the left panel displays the notes that were recently updated or created with details. You can press the **List** and **Tab** view icons to view the notes in list and tab view. The right panel displays the map view of the notes. The top section of the screen displays the notebook name and the total number of notes is also displayed.

You can specify if you want to view the Notes and Tasks or only the Tasks by selecting the options using the **Filter** icon.

2.1. View Notes – List & Tab View

1. The **Notes** list & tab view displays the notes that were recently updated or created with details such as Note Type, Note Name, Modified date, Created by, and Location.

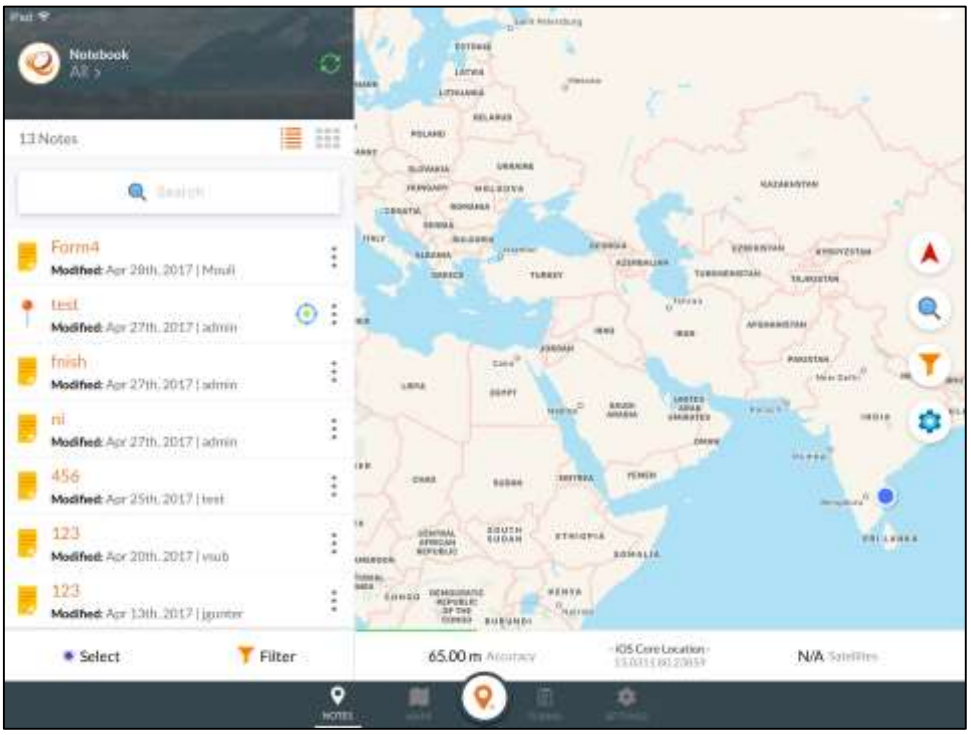


Figure 143: Notes - List View

2. In the List view, the notes are displayed in a list. The Tab view displays the notes as cards.

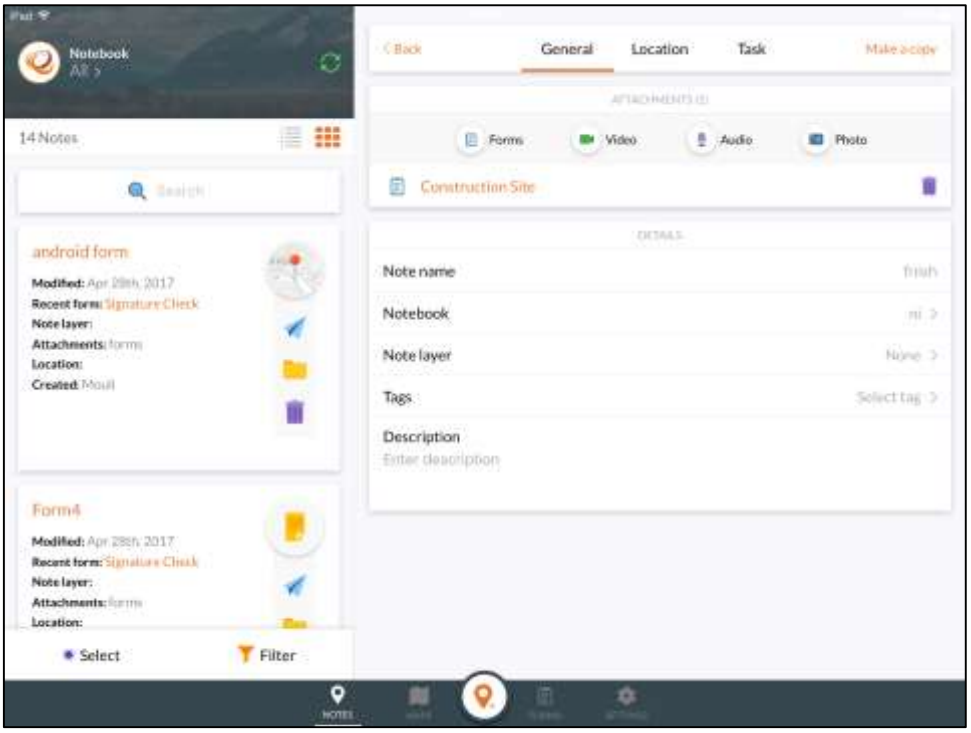


Figure 144: Notes - Tab View

3. If you want to select a different notebook, press the navigation arrow near the notebook name, based on which the corresponding notes and tasks are displayed. The list displays all the notebooks available in the server with the **Download** icon. Press to download the notebook. You can create a new notebook by pressing the **New** button on the top right section.
4. To view and modify a note, press on the note name. The note opens as shown below on the right panel:

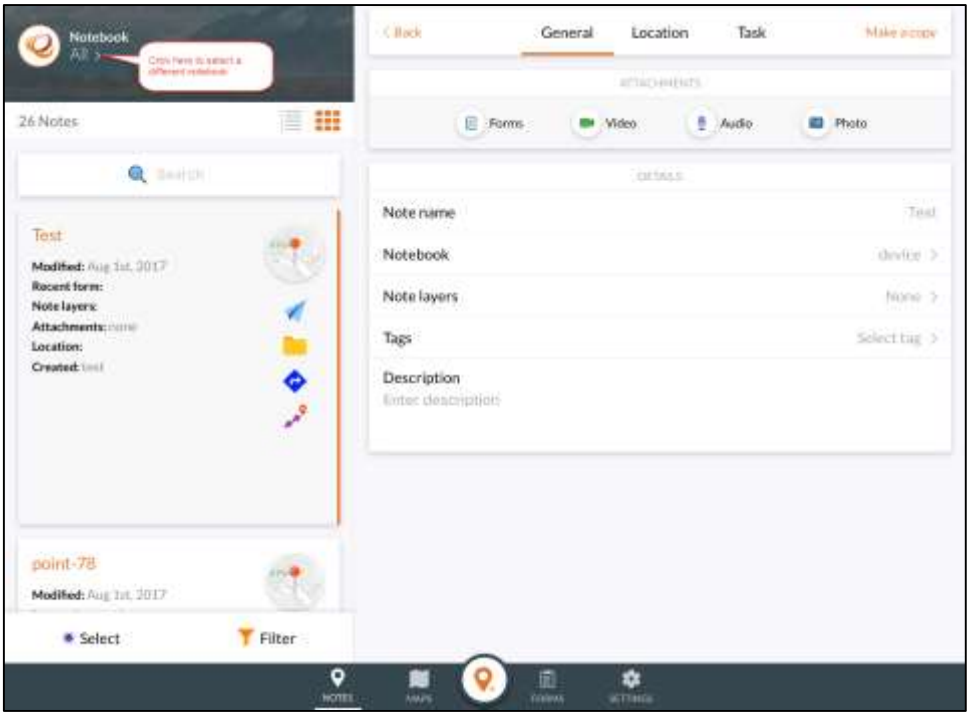


Figure 145: Note

5. **Start navigation** : When you select this option, the map view opens displaying the directions from your current location to the selected note's point location. When you press the Guidance button on the top left corner of the screen, the guidance screen opens.
6. **Show guidance** : When you select this option, the guidance screen opens displaying a straight line and the distance between your current location and the note's point location. The distance units is displayed based on the current measurement settings.
7. The **Filter** icon allows you to filter and sort the notes and also choose if you want to display the notes or tasks.
8. In the **Sort** dropdown, you can select the parameters from the following options, based on which the notes will be displayed:

   - Modified
   - Modified by
   - Form name
   - Note layer
   - Attachment type
   - Location description
   - Created date
   - Created by

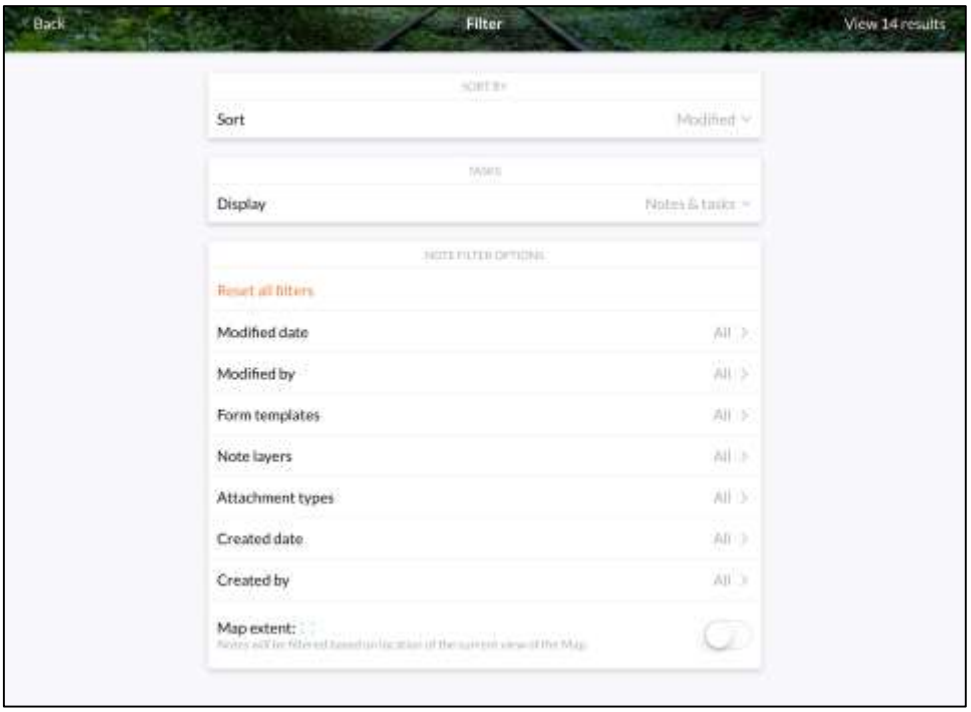


Figure 146: Filter & Sort

9. Under **Tasks**, in the Display dropdown, you can select from the following options, based on which the notes will be displayed.

    - Notes & tasks – Both Notes and Tasks are displayed
    - Tasks only – Only tasks are displayed
    - My tasks – Only tasks assigned to the signed-in user will be displayed

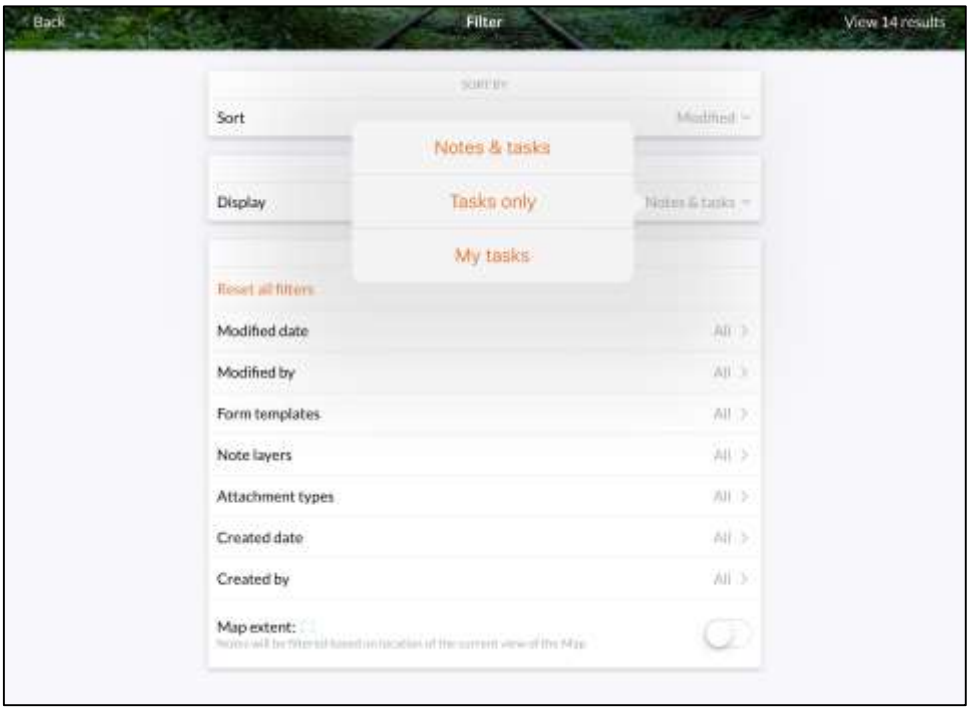


Figure 147: Notes & Tasks Options

10. You can use the **Filter** options to filter the records based on:

    - Modified date
    - Modified by
    - Form templates
    - Note layers
    - Attachment types
    - Created date
    - Created by
    - Map extent

11. To search for a note, enter the name of the note that you want to view in the **Search** field.
12. To create a new note, press the Quick Launch icon at the bottom center of the screen. You will be redirected to the Create Note screen. **Note**: The Quick note option will be available only if it is enabled in the selected notebook.

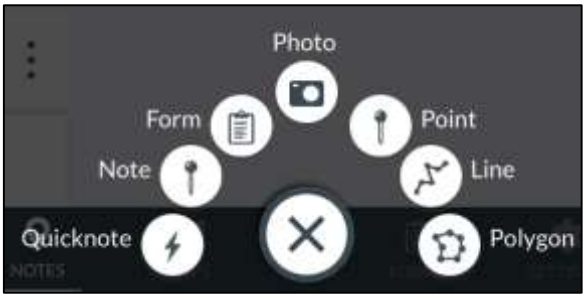


Figure 148: Quick Launch

13. The Notes map view screen displays the location of the note. The recenter icon re-centers your position on the screen.
14. To view a certain location on the map, press the Search icon and enter the location name in the **Map search** field.
15. In the list view, to move, share or delete a note, press the settings icon on the right side of the corresponding note.

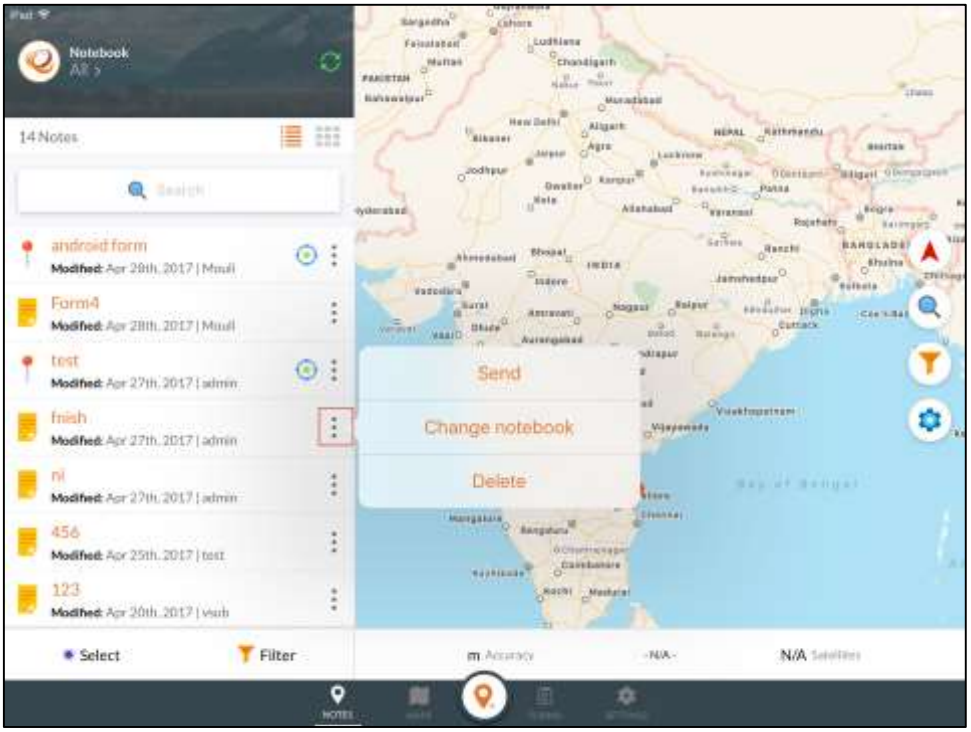


Figure 149: Notes - List view

16. In the Tab view, press the corresponding icons as shown and explained below:

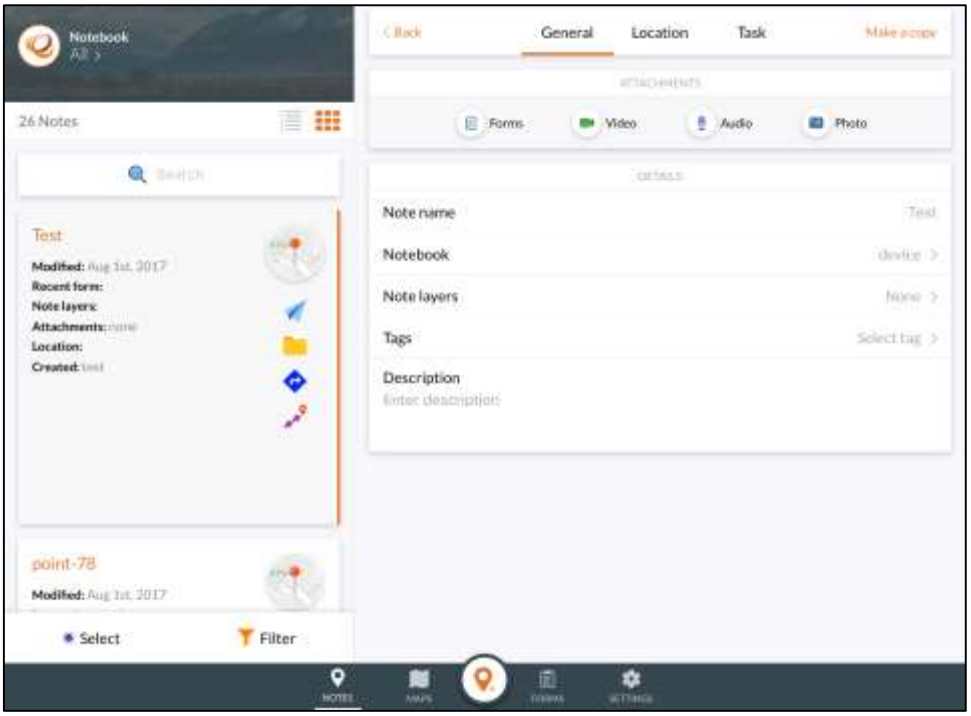


Figure 150: Tab view

- **Send**: Press this option to share the note with other users as PDF, geopackage, or as an export file.

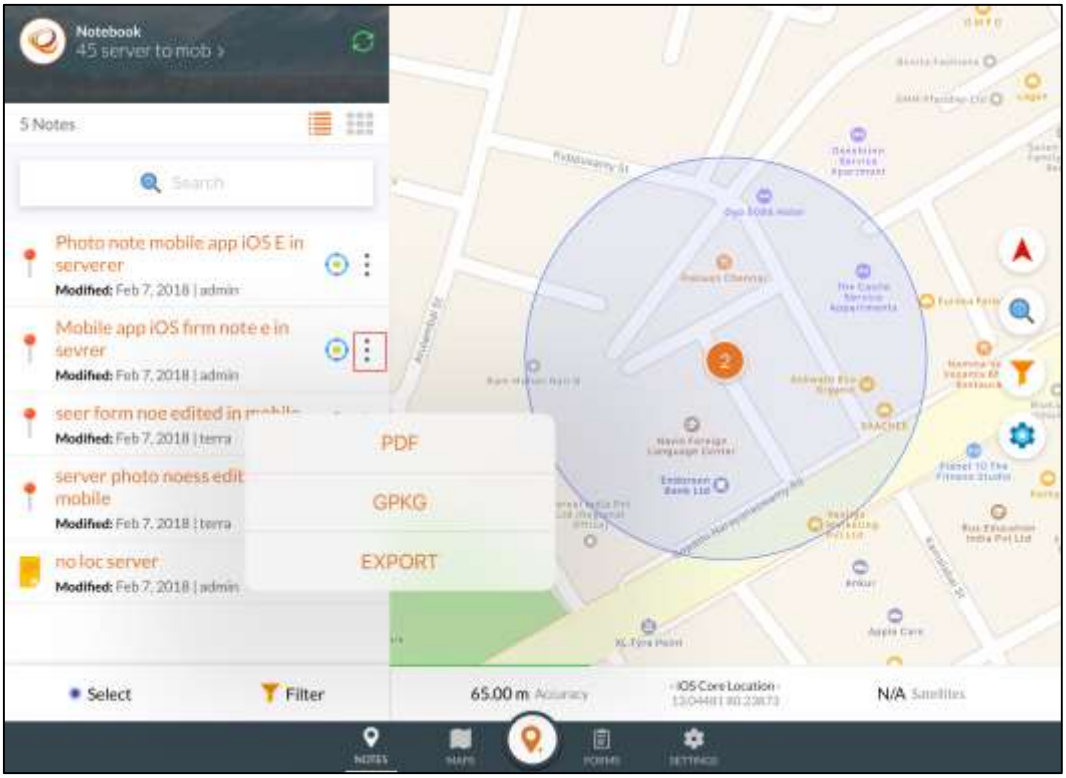


Figure 151: Share Note

- Press the **PDF** option. The note is now exported as a PDF and a preview of the note is displayed.

  Now press the Share icon to send the note PDF through mail, message, air drop or drop box.

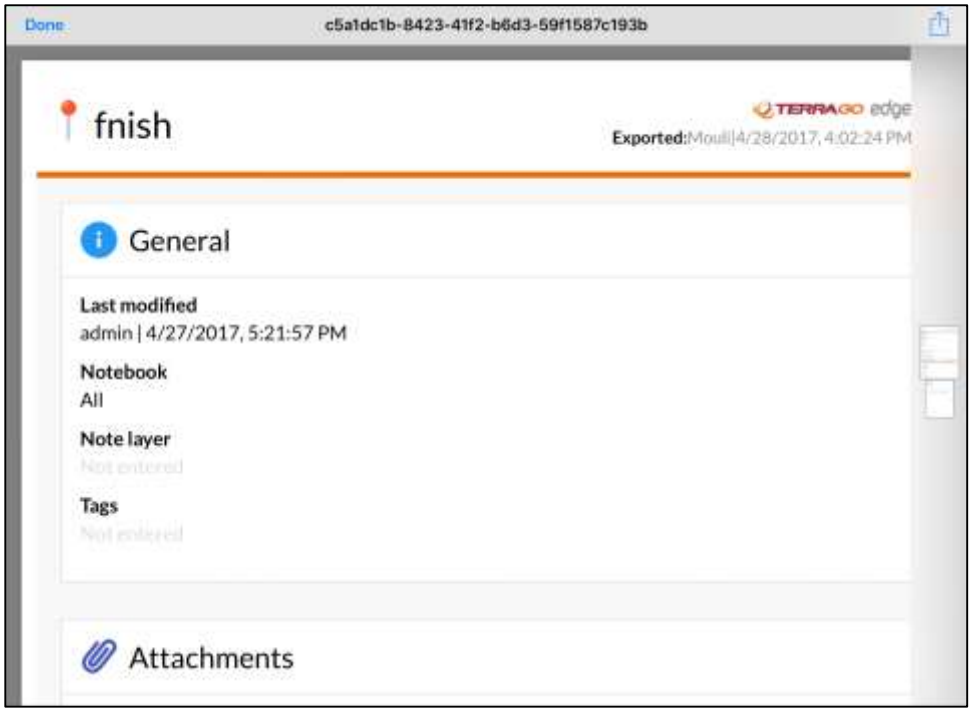


Figure 152: Note share - PDF

- Press the **GPKG** option to share the note as a geopackage file with other users. Press the **Mail** icon and enter the email addresses of the people you want to share the note with. The note is sent as a zip file.

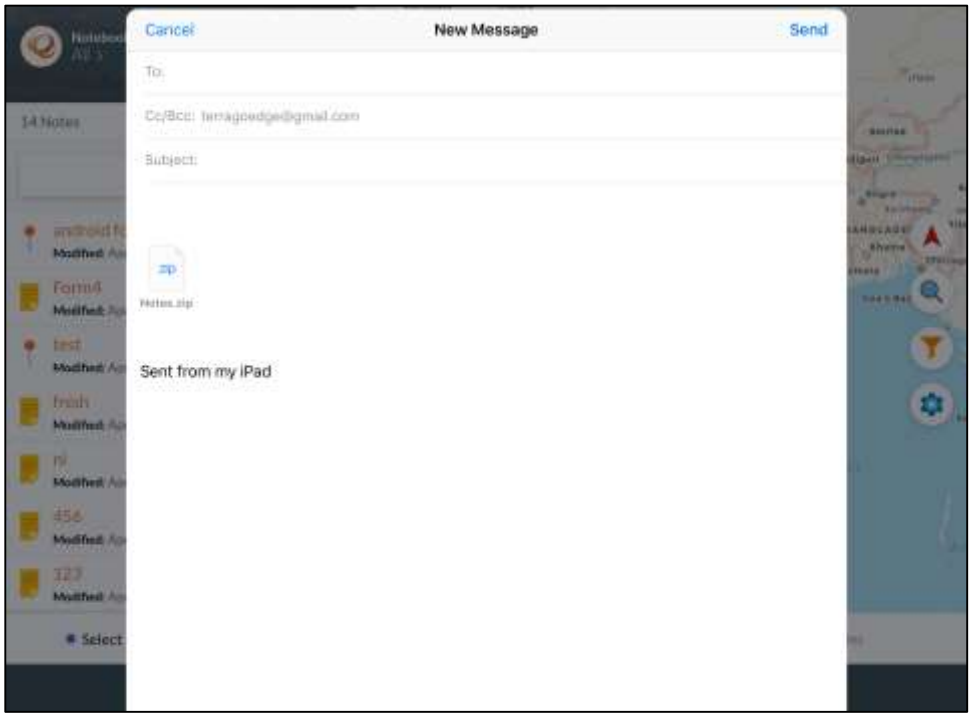


Figure 153: Note share - GPKG

- Press the **Export** option to share the note as an export file with other users. Press the **Mail** icon and enter the email addresses of the people you want to share the note with. The note is sent as an export file.

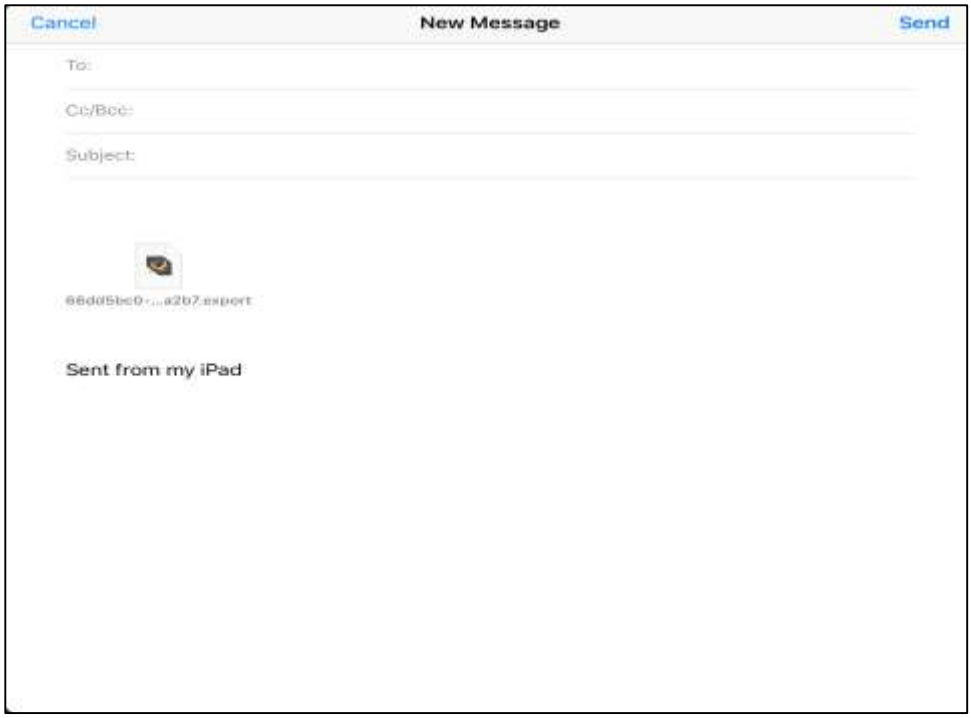


Figure 154: Note share - Edge

- **Change Notebook:** Press this icon to move a note from one notebook to another notebook or to move an unassigned note to a notebook. Every change is added in the note's revision history.

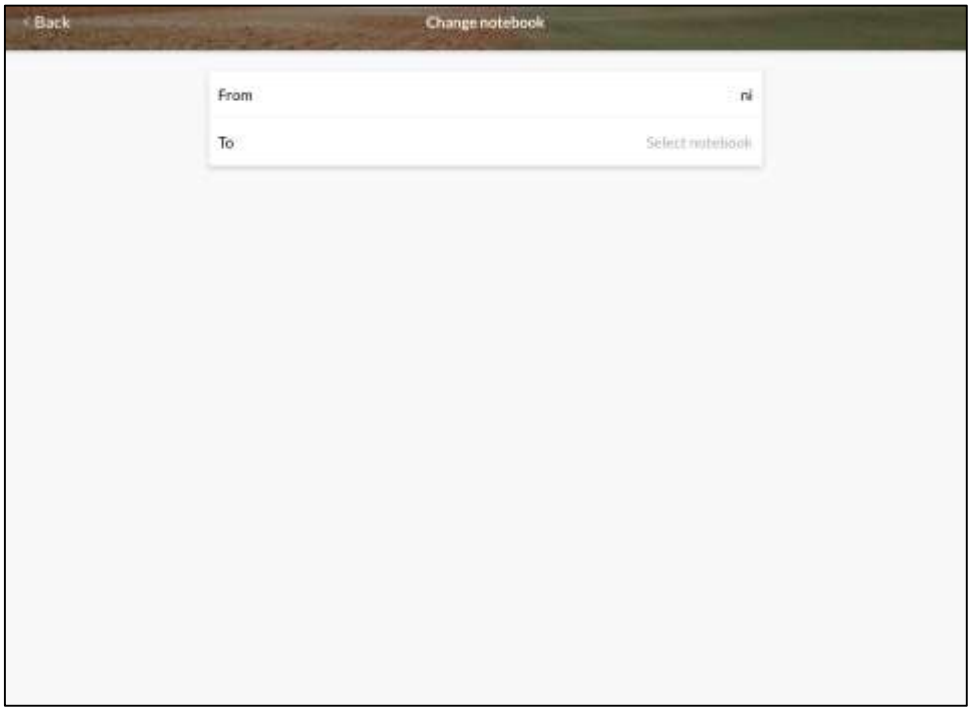


Figure 155: Change notebook

- **Delete**: Press this icon to delete the selected note. Press **Ok** in the confirmation dialog box.

17. You can press the **Select** icon at the bottom of the screen to share, move, or delete multiple notes or tasks.

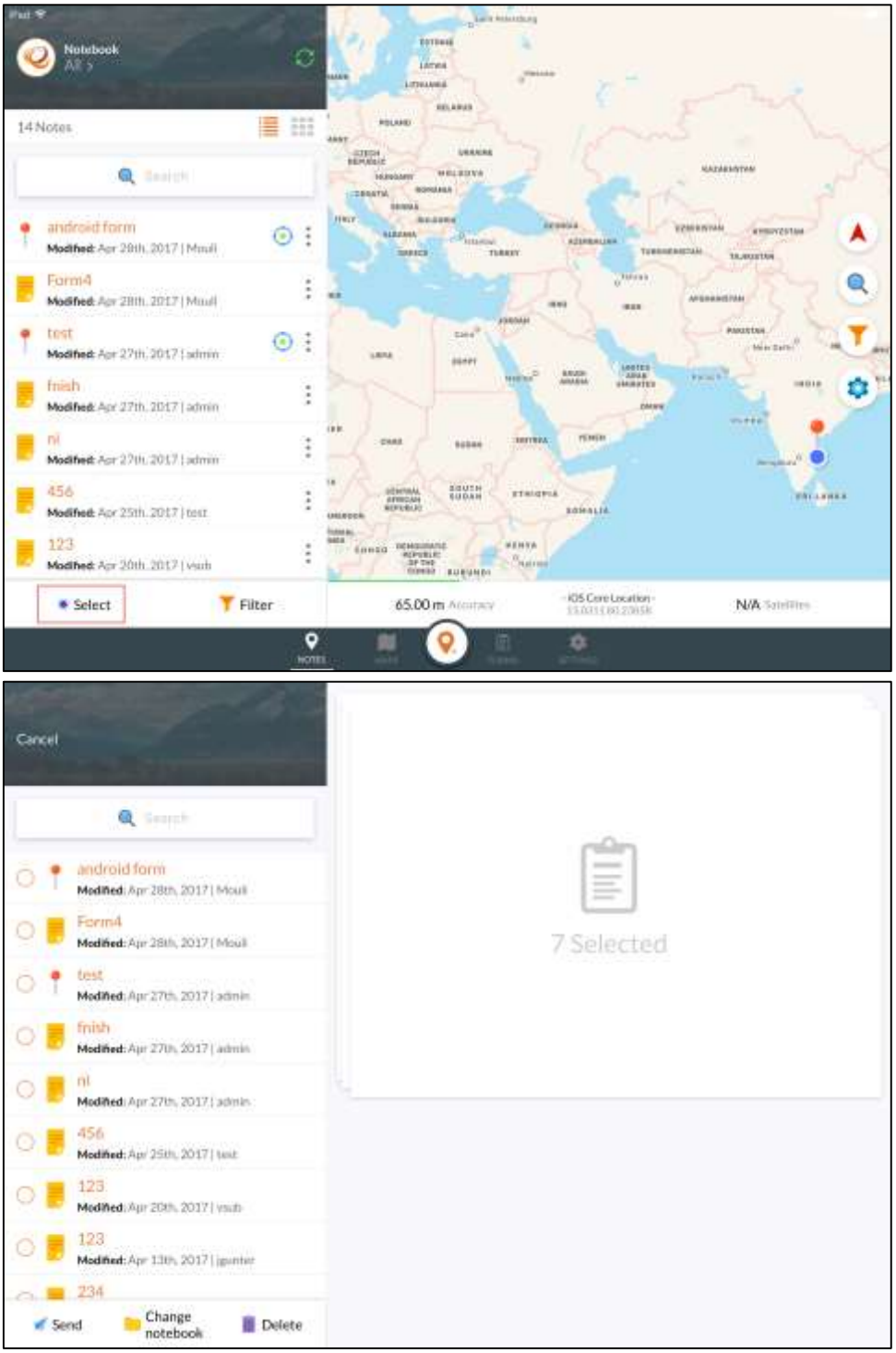


Figure 156: Multiple Notes

18. You can share the notes as a pdf, geopackage or an export file.

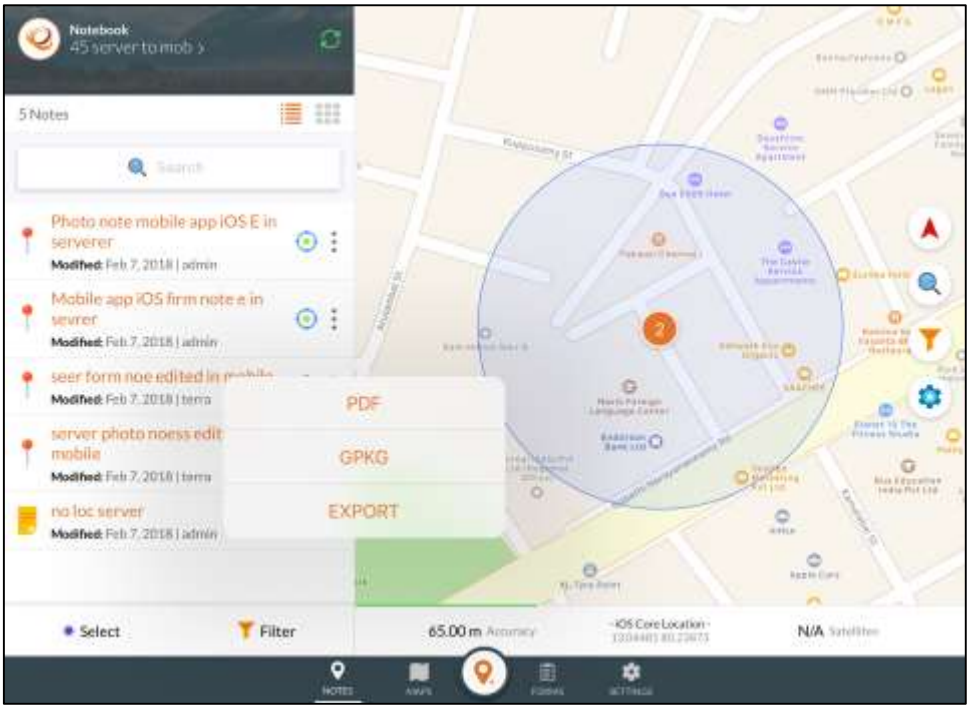


Figure 157: Share notes – List view

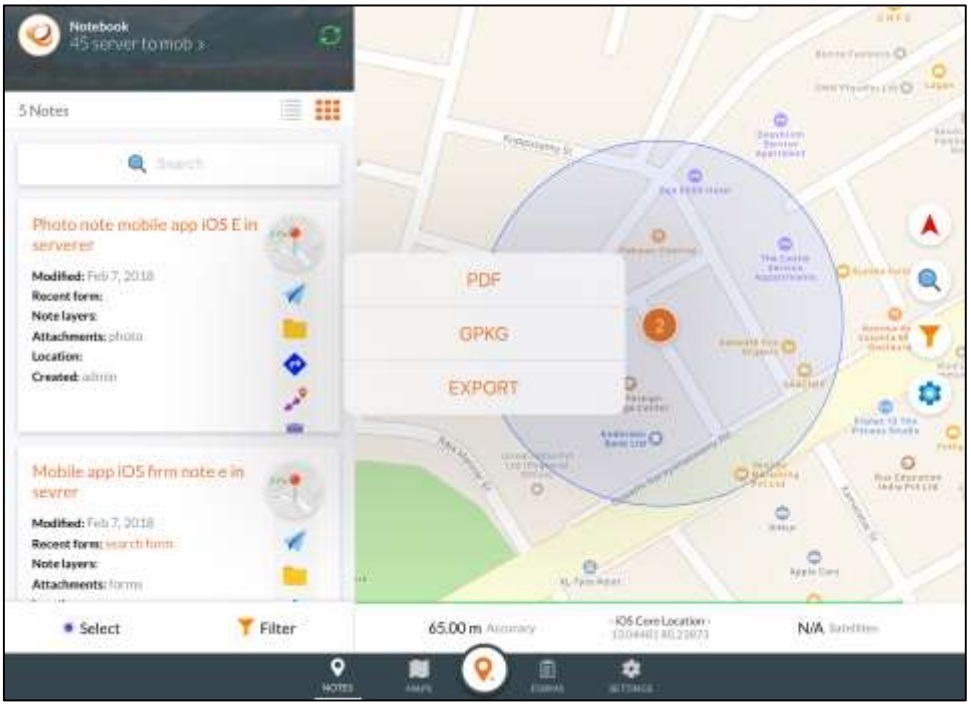


Figure 158: Share notes – Tab view

3. View Maps & Overlays

3.1. Offline and Online Maps

1. The **Maps** section displays all the offline and online maps available in the server. A preview of the map or the map overlay that you select is displayed on the right panel.

2. The **Offline** tab displays the list of offline maps related to the notebooks available in your device with the map name, creator, and creation date with timestamp details.

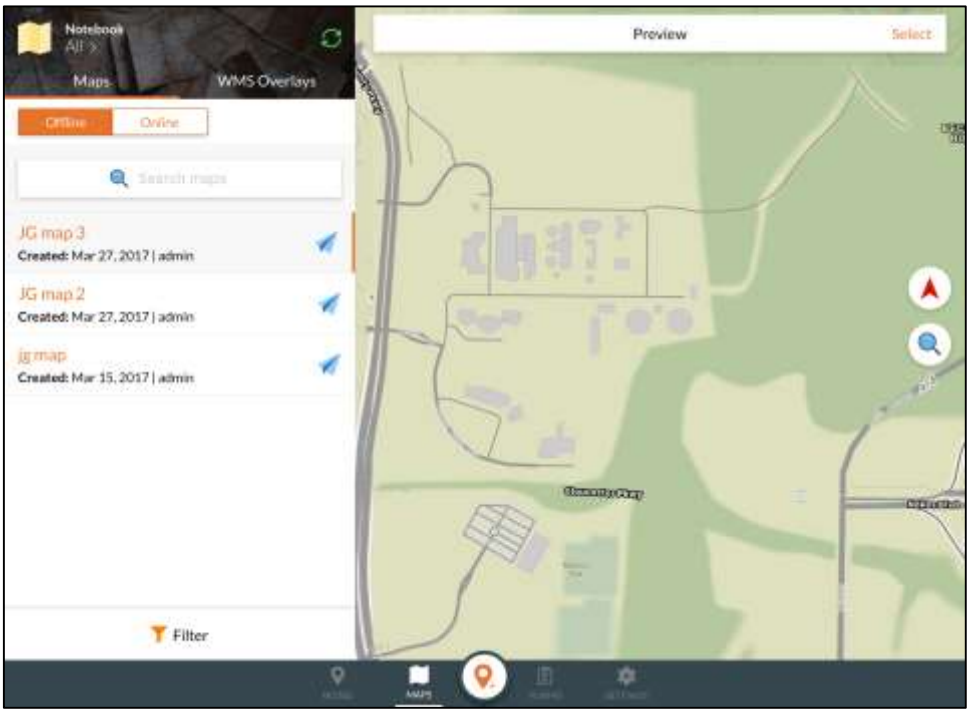


Figure 159: Offline Maps

3. The **Online** tab displays the list of all the online maps.

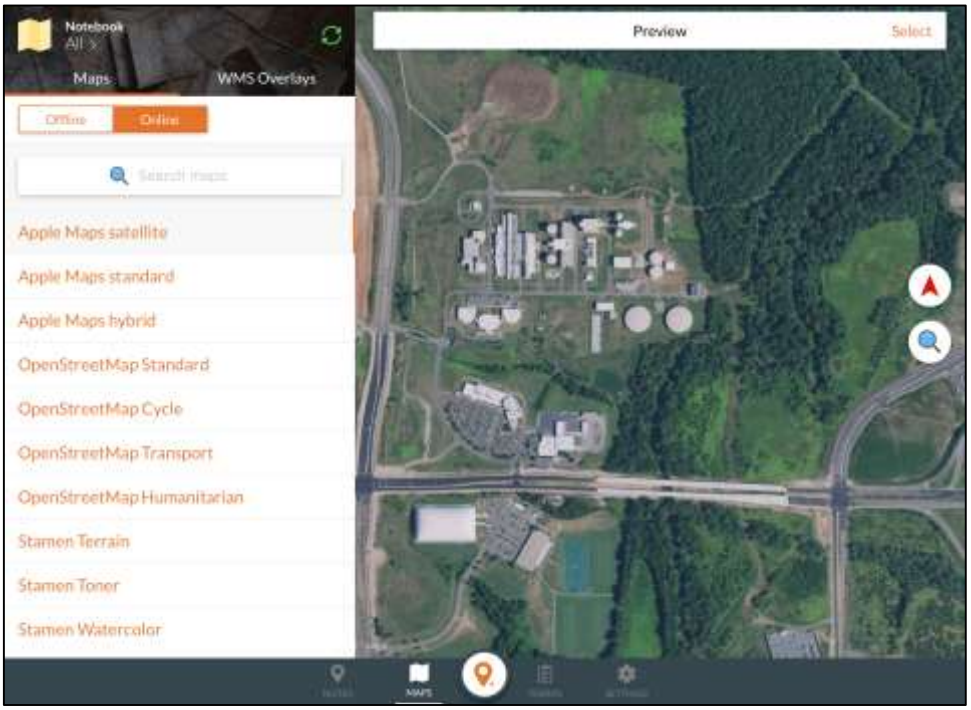


Figure 160: Online Maps

4. In the map preview, if you press the **Select** option on the top right corner of the screen, the selected map is displayed in the Notes map view. The recenter icon re-centers your position on the screen. To view

a certain location on the map, press the Search icon and enter the location name in the **Map search** field.

5. Press the **Filter** icon to sort and filter the maps. In the **Sort** dropdown, you can select the parameters from the following options, based on which the maps will be displayed:
    - Map name
    - Created date
    - Created by
6. You can use the **Filter** options to filter the records based on the following parameters:
    - Created date
    - Created by
7. You can search for a map by entering your queries In the **Search maps** field.
8. Press the **Send** icon corresponding to the map to share through mail.

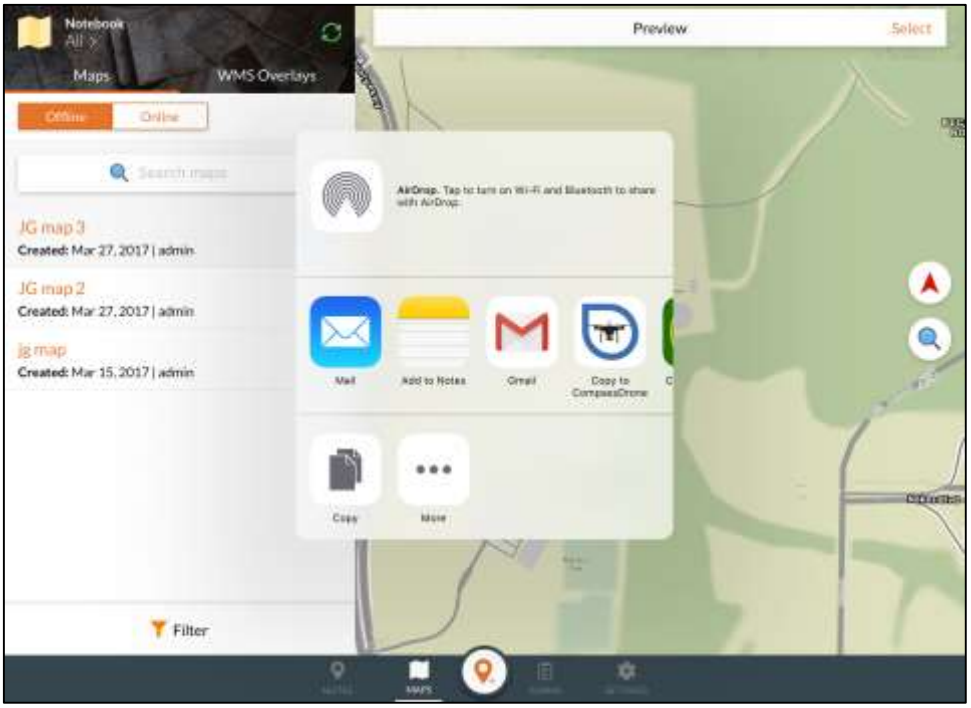


Figure 161: Share Map

3.2. Overlays

1. The **WMS Overlays** tab displays all the available WMS Overlays with the overlay title, created from, type, and created date. A preview of the map overlay that you select is displayed on the right panel.

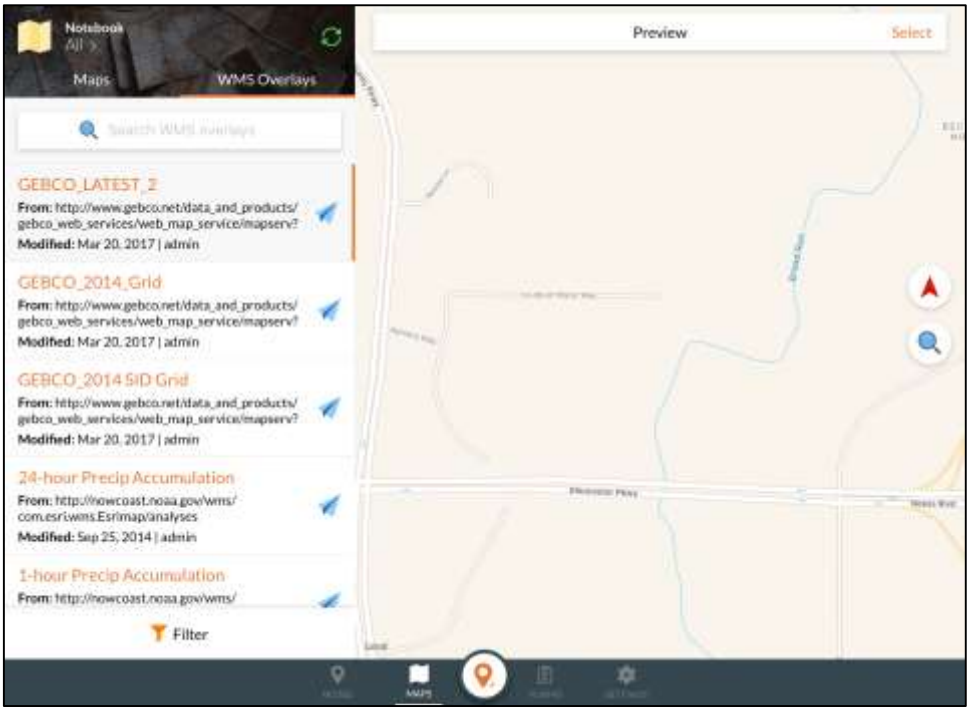


Figure 162: Maps Overlays

2. In the map overlay preview, if you press the Select option on the top right corner of the screen, the selected map overlay is displayed in the Notes map view. The recenter icon re-centers your position on the screen. To view a certain location on the map, press the Search icon and enter the location name in the search field.
3. Press the **Filter** icon to sort and filter the records. In the **Sort** dropdown, you can select the parameters from the following options, based on which the map overlays will be displayed:
    - Title
    - Created Date
    - Created By
4. You can use the **Filter** options to filter the map overlays based on the following parameters:
    - Modified on
    - Modified by
    - From
5. Press the **Send** icon corresponding to the WMS Overlay to share through mail.
6. You can search for a WMS overlay by entering your queries in the **Search WMS Overlays** field.

4. View Forms

1. The **Forms** section displays all the forms related to the notebooks that are available in your device. The selected form template is displayed on the right panel.

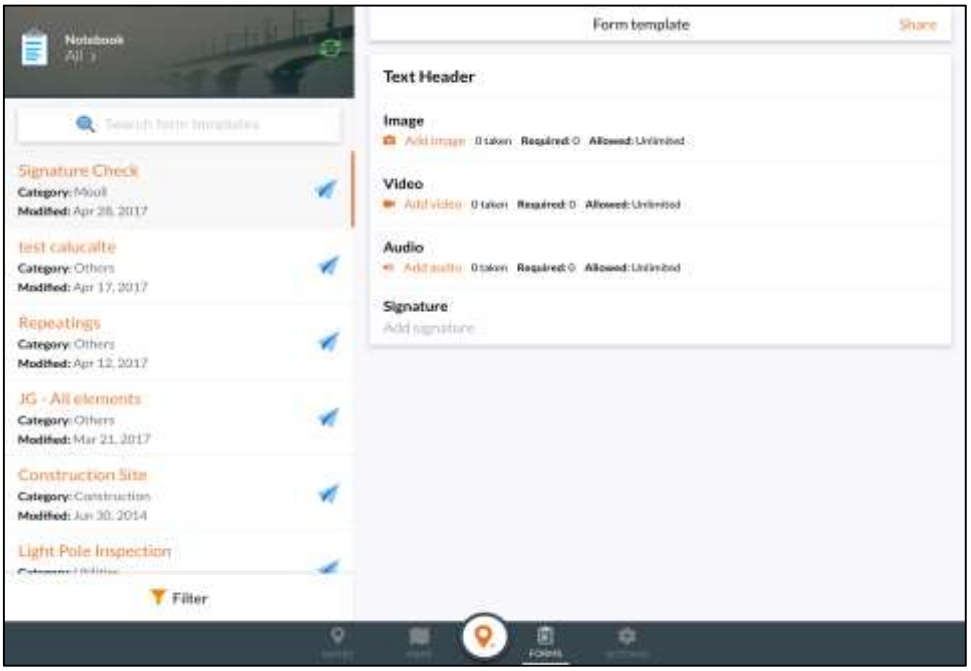


Figure 163: View forms

2. Press the Send icon to share the form as a PDF with other users through mail.
3. Press on the form name to enter the form details and create a form note. You'll be taken to the note creation screen.

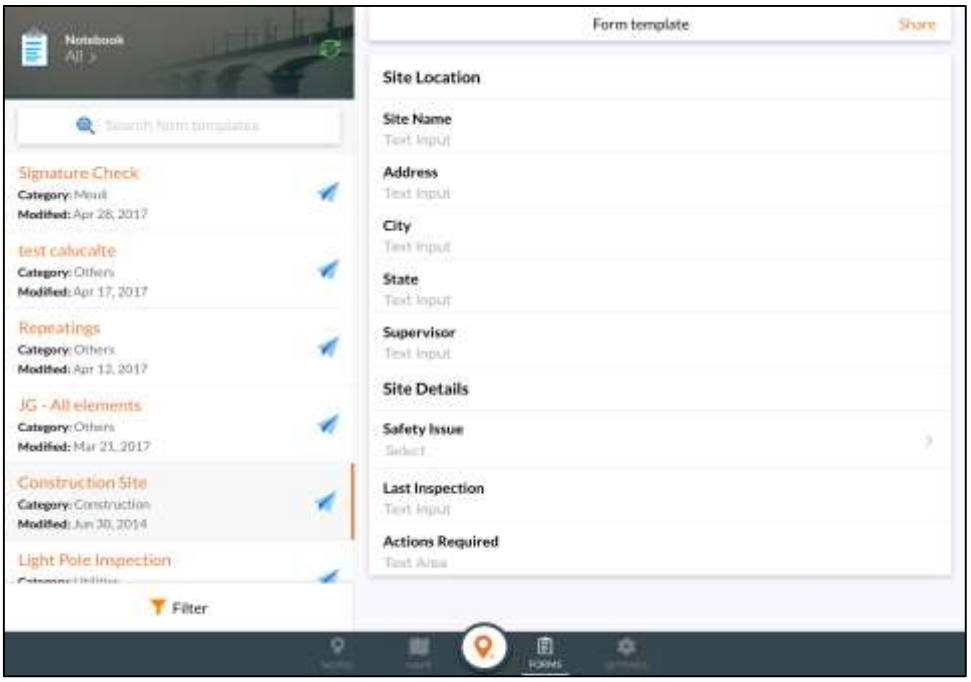


Figure 164: Enter form details

4. The **Filter** icon allows you to filter and sort the forms. In the **Sort** dropdown, you can select the parameters from the following options, based on which the forms will be displayed:

   - Category
   - Name
   - Modified date
   - Modified by

5. You can use the **Filter** options to filter the records based on:

   - Modified date
   - Modified by
   - Category

6. You can search for a form by entering your queries in the **Search form templates** field. You can also search by using the form data as your queries.

5. Creating Notes

5.1. Creating Assigned/Unassigned Notes

1. Press the Quick launch icon and select the **Note** icon. The note screen opens as shown below:

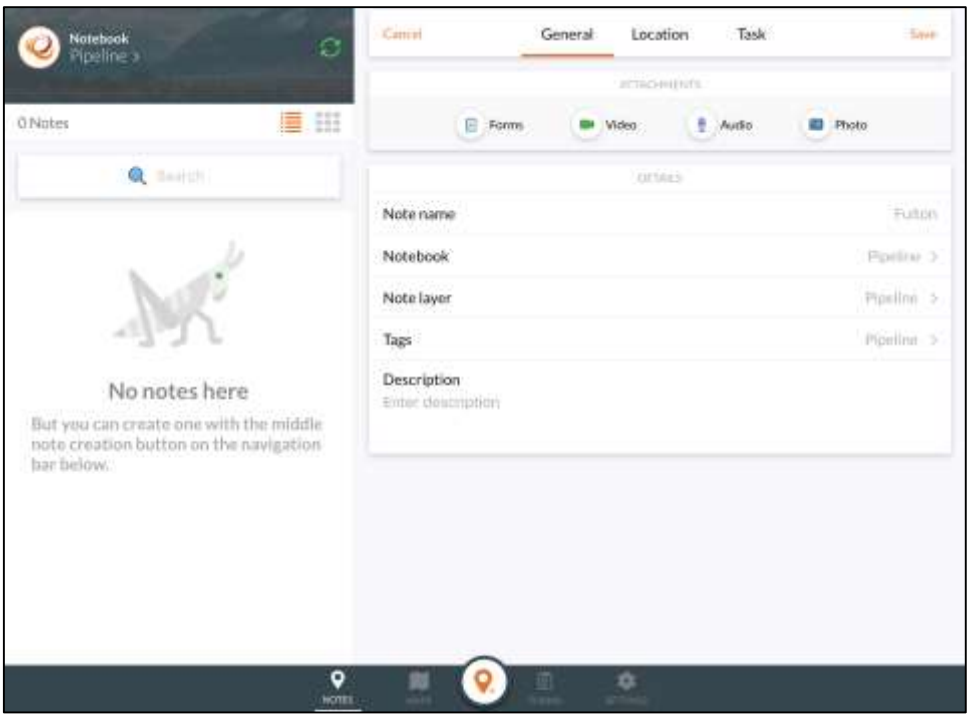


Figure 165: Note – General

2. To create assigned notes, select the notebook in the Notebooks section. If you want to create unassigned notes, select None.

3. On the note screen, there are three tabs: **General, Location**, and **Task.**
4. On the **General** tab, enter a name and a short description for the note in the **Note name** and **Description** fields.
5. The **Notebook** field displays the notebook that you selected. If you want to change the notebook, press the navigation arrow to select a notebook in which you want to assign the note to.
6. In the **Note Layer** field, press the navigation arrow to select a note layer name. To create a new note layer, press **New** at the top right corner of the screen. In the **New Layer** screen that opens, enter the name of the new note layer and press the **Save** button. The note layer will be added to the list. Select the note layer and press **Back** to go back to the note screen. The note will be created under the new layer that you created.

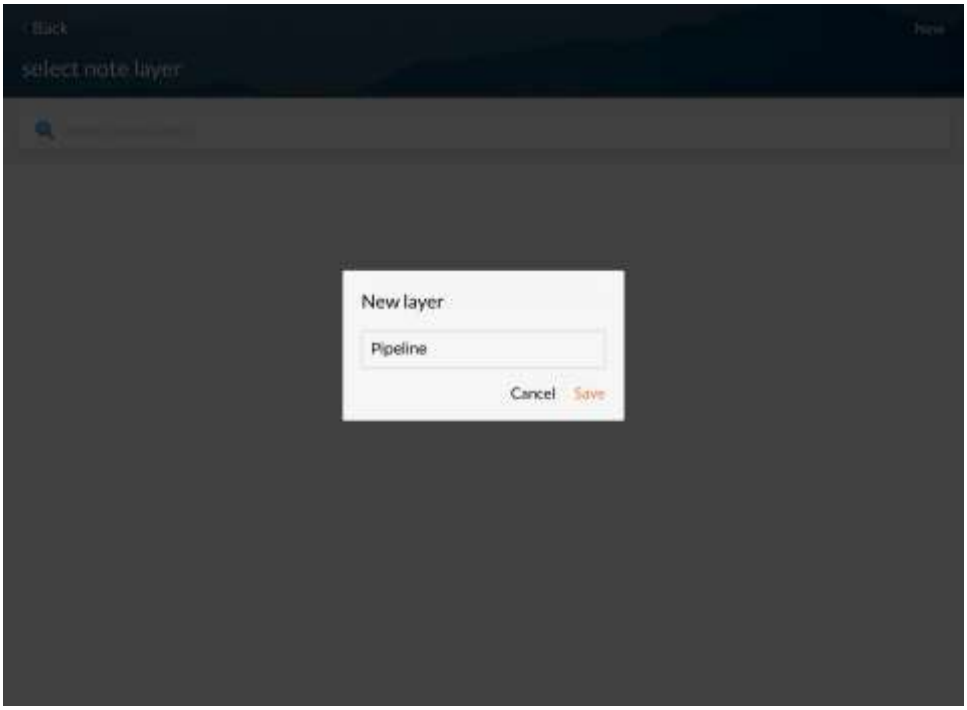


Figure 166: Create note layer

9. If Symbology is enabled, the note's pin marker is symbolized in the notes list view and map view based on the color assigned for the selected note layer.

   Note: The symbology feature enables you to symbolize the pin markers by setting different colors for each note layer, thus providing you with a better interpretation of the data in the map. Each note layer is assigned a color, based on which the corresponding note's pin marker will be symbolized. You can use upto 20 colors. This symbology feature will be provided in Edge only upon customer's request.

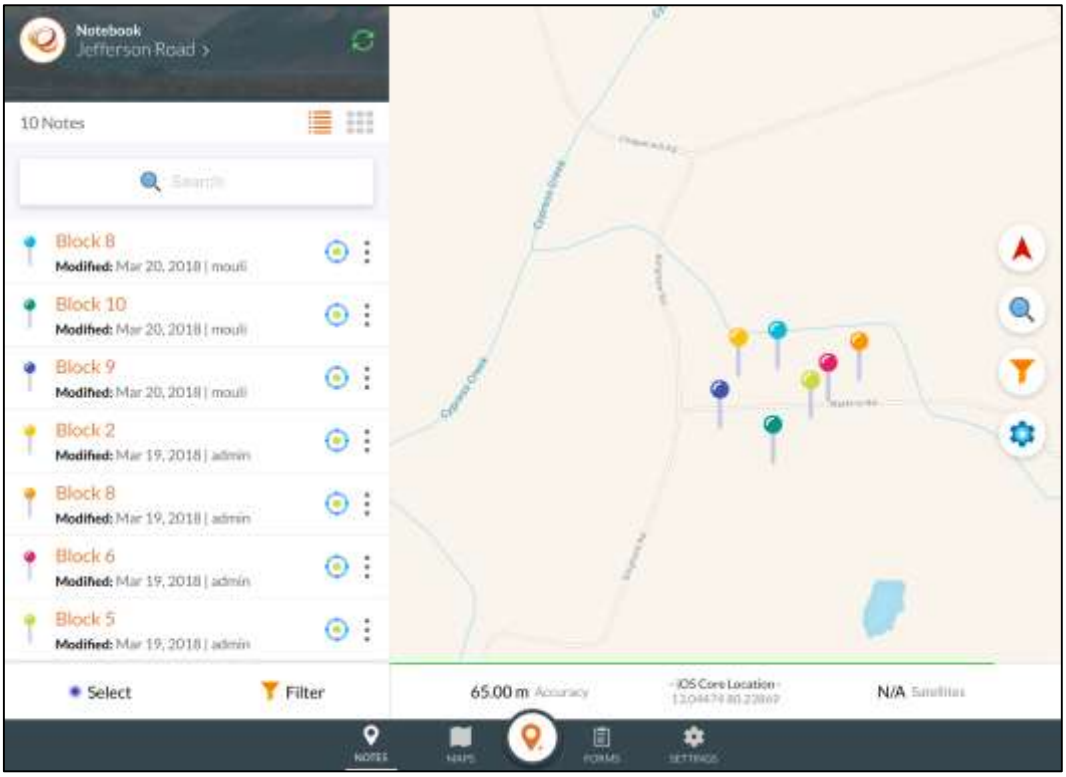


Figure 167: Symbology - Note pin marker

7. In the **Tags** field, press the navigation arrow to select and add tags for the ease of identification. Multiple unique tags can be attached to a note. To create a new tag, press **New** at the top right corner of the screen. In the **New tag** screen that opens, enter the name of the new tag and press the **Save** button. The tag will be added to the list. Select the tags that you want to attach to the note. Press **Back** to go back to the note screen.

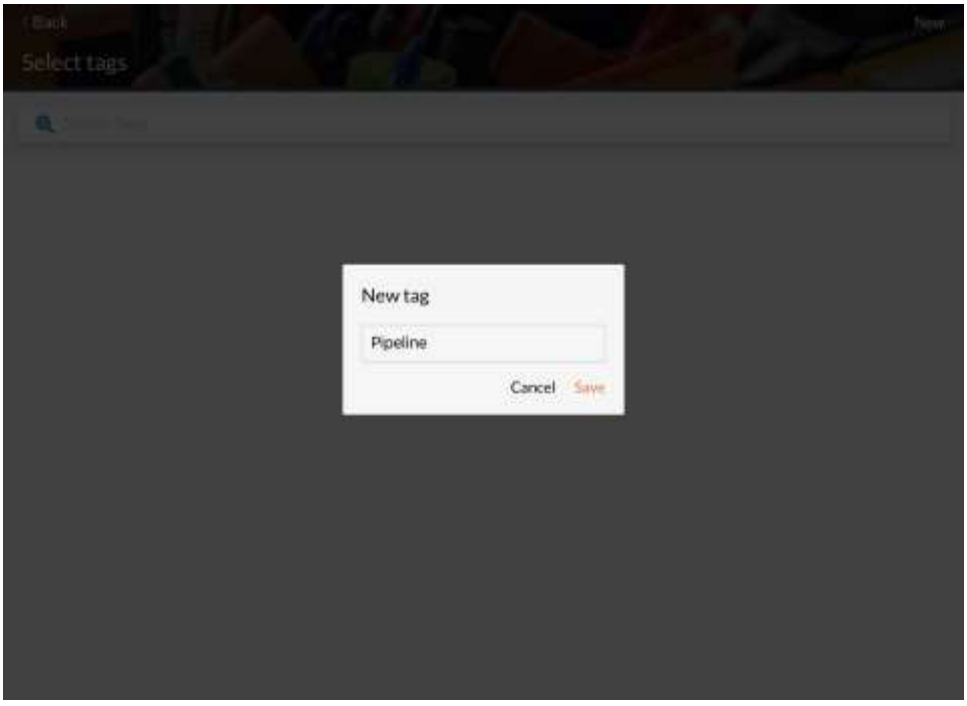


Figure 168: Adding tags

5.1.1. Adding Location to a Note

On the **Location** tab, the **Location** section displays the location coordinates of your current location and the **Location Metadata** displays the GPS metadata such as accuracy, altitude, number of satellites, bearing, etc. and also the measurement information.

Note: The location data are provided to the app based on the location service providers and the rate interval that you specified in Location Settings. Based on the accuracy of the data provided, Edge will either use the standard location service or the third party GPS device data. The progress bar will display the rate interval at which the location data is provided to the Edge app that is specified in Location settings.

If the **Enable laser rangefinders (LRFs)** button is toggled on in Location Settings, Edge will use the paired device to capture the location data.

If the location data services are turned off, the Location tab displays the Point, Line, and Polygon icons.

If the **Proximity alert** button is toggled on in Location Settings, a proximity alert message with sound and vibration is displayed when your current distance from the selected note's location point is less than or equal to the defined proximity distance.

1. The **Location** section on the Location tab displays your current location's coordinates. If you press the **Delete location** button, the location coordinates are cleared.

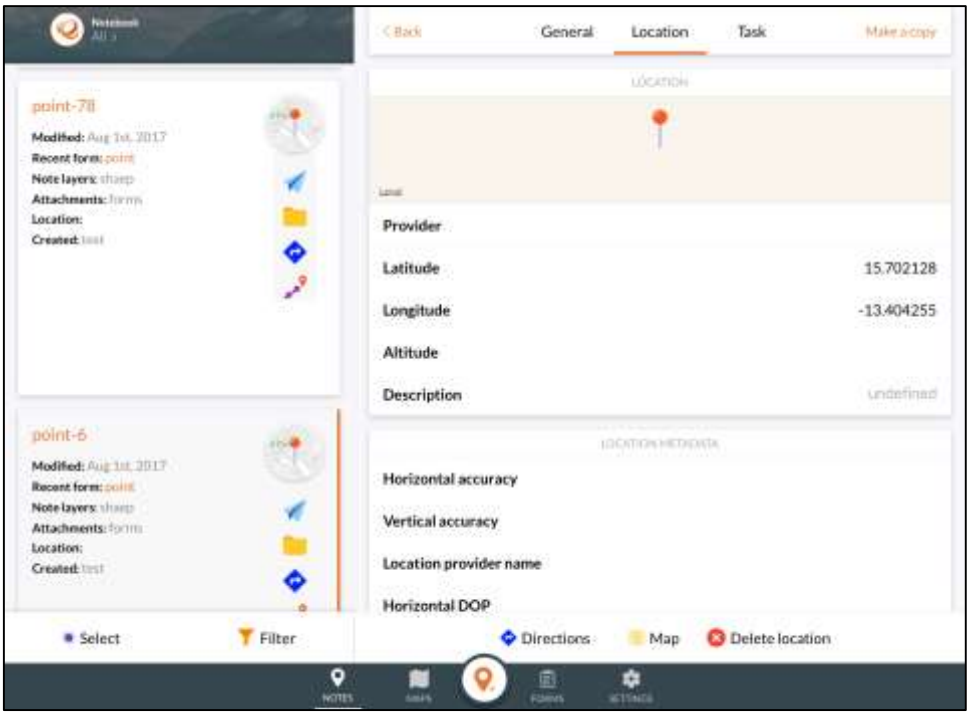


Figure 169: Current Location Coordinates

2. When you press the Navigation icon on the bottom left corner, the map opens displaying the directions from your current location to the selected note's point location. When you press the Guidance button on the top left corner of the screen, the guidance screen opens.

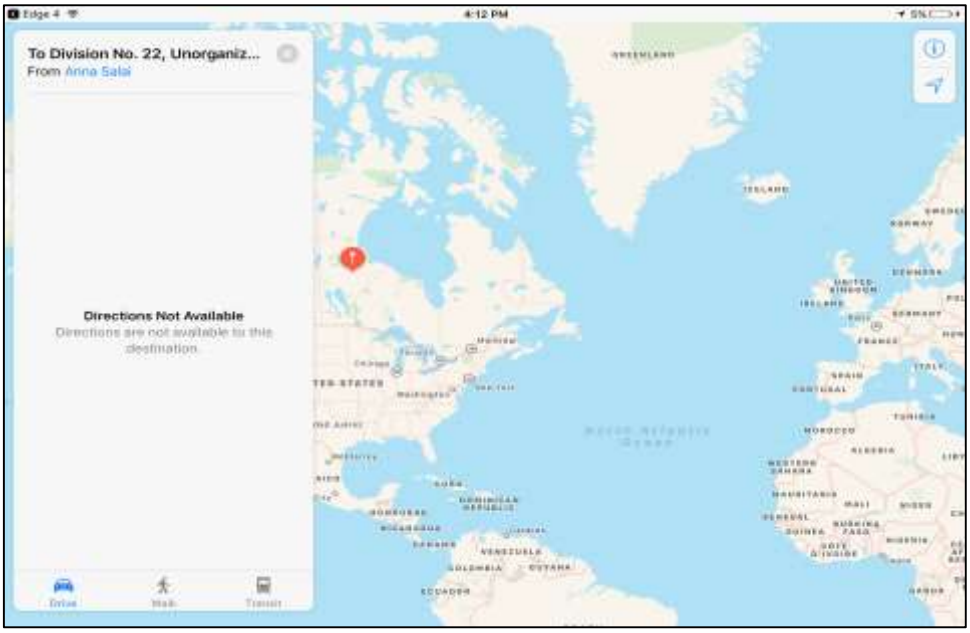


Figure 170: Directions

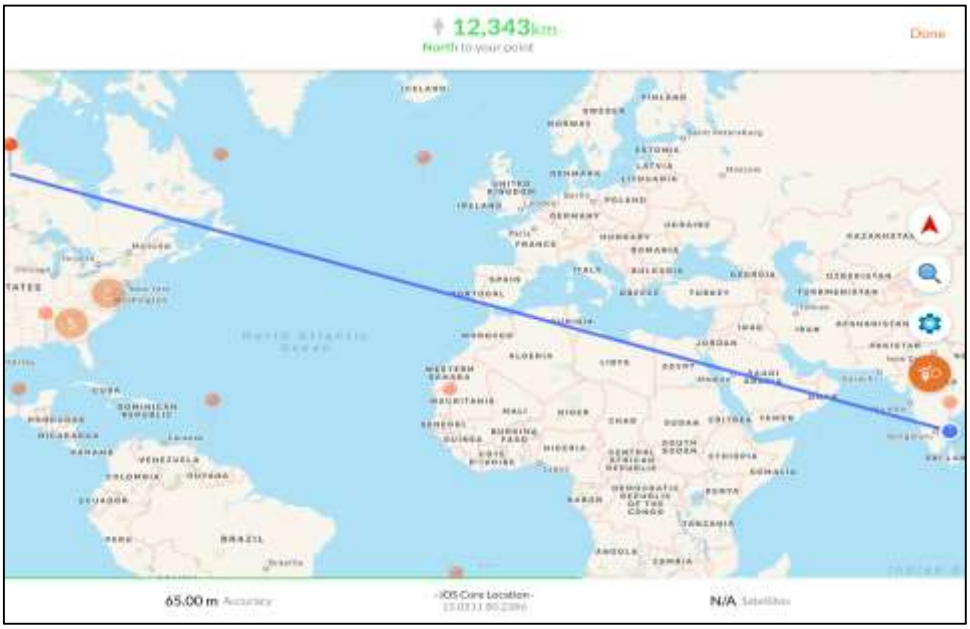


Figure 171: Guidance

3. When you enter the close proximity area (**Proximity alert** button must be toggled on in Location settings), which is when your current distance is less than or equal to the defined proximity distance from the selected note's location point, a proximity alert message with sound and vibration is displayed. This proximity alert distance can be specified in location settings. An alert message with saying “You’re almost there” is displayed for 3 seconds when you enter the close proximity and the line, distance, and direction are displayed in green color, after which it changes to blue when you leave the close proximity area. A straight line is displayed between your current location and the note’s point location. Also the distance and direction from your current point is displayed. You can dismiss this alert by pressing the **Dismiss** button. You can change the proximity alert distance by pressing the **Settings** button.

4. To view the map, press on the map near the **Description** or the **Map** icon at the bottom left corner of the screen. The map opens displaying a pin marker at your current location. The recenter icon re-centers your position on the screen. If you press the Guidance button on the bottom left corner of the screen, the guidance screen opens displaying a straight line and the distance between your current location and the note's point location. Press **Back** to go back to the note.

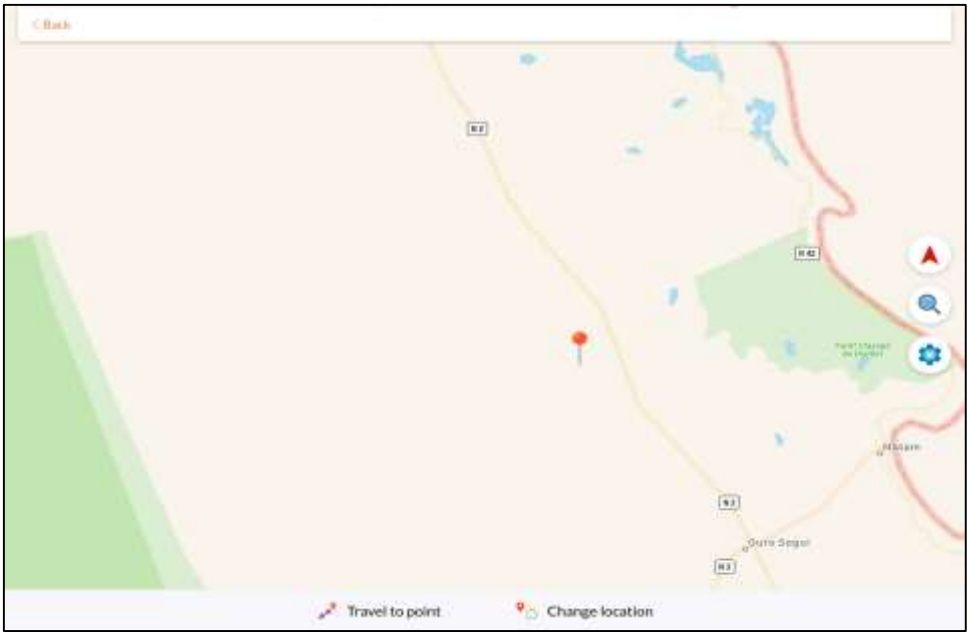


Figure 172: Guidance

5. Press the **Settings** icon on the map screen. The Map settings screen opens as shown below, where you can select map, map overlays, and measurement settings. Press **Back** to go back to the map.

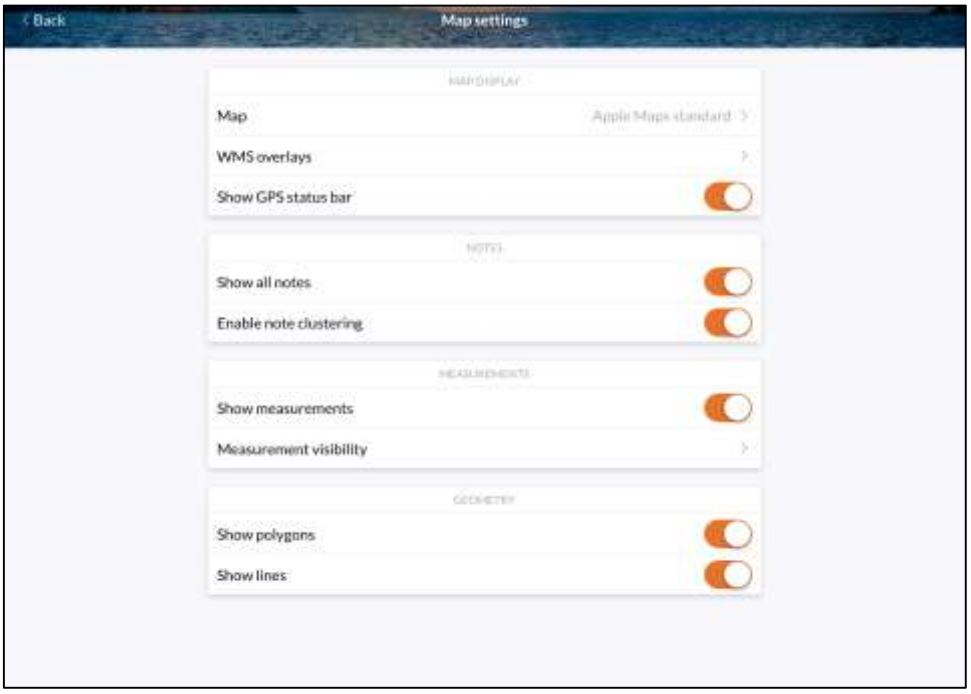


Figure 173: Map Settings

6. Under **Map Display,** in the **Map** and **WMS overlays** fields, you can select from the list of existing map maps and map overlays. If the **Show GPS status bar** button is toggled on, the location coordinates of your current location with additional GPS metadata such as accuracy, altitude, and number of satellites is displayed on the map.
7. In the **Notes** section, if the **Show all notes** button is toggled on, all the notes are displayed in the map as points, polylines, or polygons. When the **Enable note clustering** button is toggled on, the notes appear clustered. In the map view, when you tap a cluster that is at its lowest zoom level and can't be broken out anymore, the notes list opens in a cluster filter mode with a blue info bar at the top of the notes list. You can press the **Clear** icon to return to the notes list view.

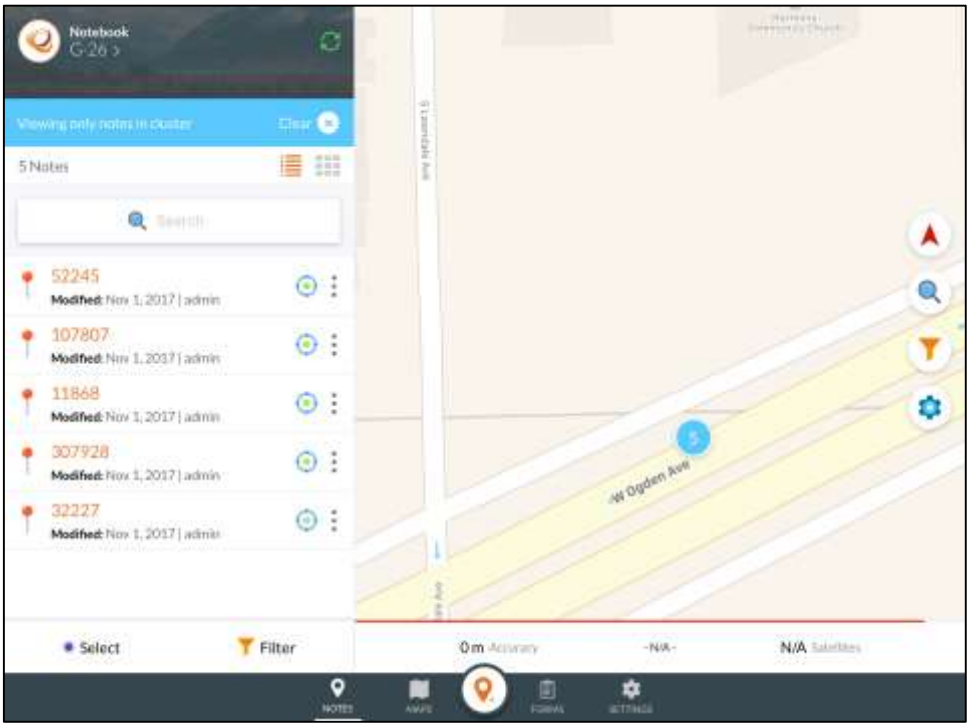


Figure 174: Cluster Filter

8. In the **Measurements** section, if you toggle on the **Show measurements** button, the distance and measurements of the polylines and polygons are displayed on the map.
9. The following toggle buttons are available in the **Measurement visibility** section:

    - **Single line segment length:** This option will allow you to measure the length of a single line
    - **Total line segment length:** This option will allow you to measure the total length of a line
    - **Polygon area:** This option will allow you to measure the area of a polygon that you draw
    - **Polygon perimeter:** This option will allow you to measure the perimeter of a polygon that you draw.

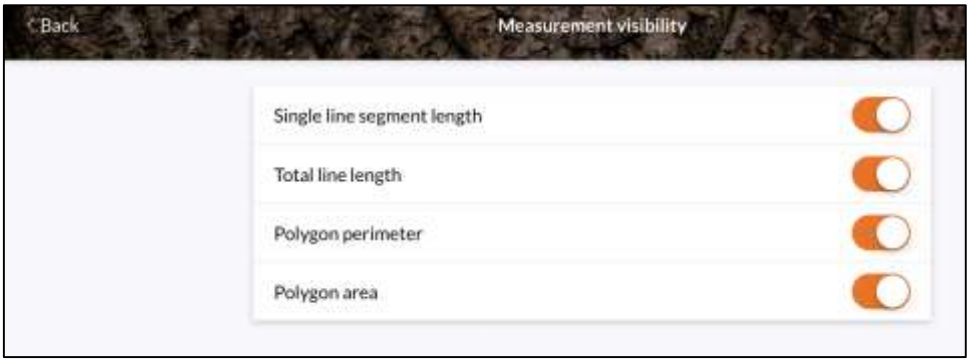


Figure 175: Measurement visibility

10. In the **Geometry** section, when the **Show polygons** and **Show polylines** buttons are toggled on, the polygons and polylines are displayed on the map.

11. The show geometry icon if pressed will display the polygons and polylines on the map. Press **Back** to return to the map.

    Note: This icon is available only in the note creation map view screen.

12. If you want to search for a location, press the Search icon and enter the location that you want in the **Search** field. The map displays the location that you searched.
13. To change your location, press the **Change location** button at the bottom of the map. A popup window opens displaying the **Edit point**, **Replace with line**, and **Replace with polygon** options.

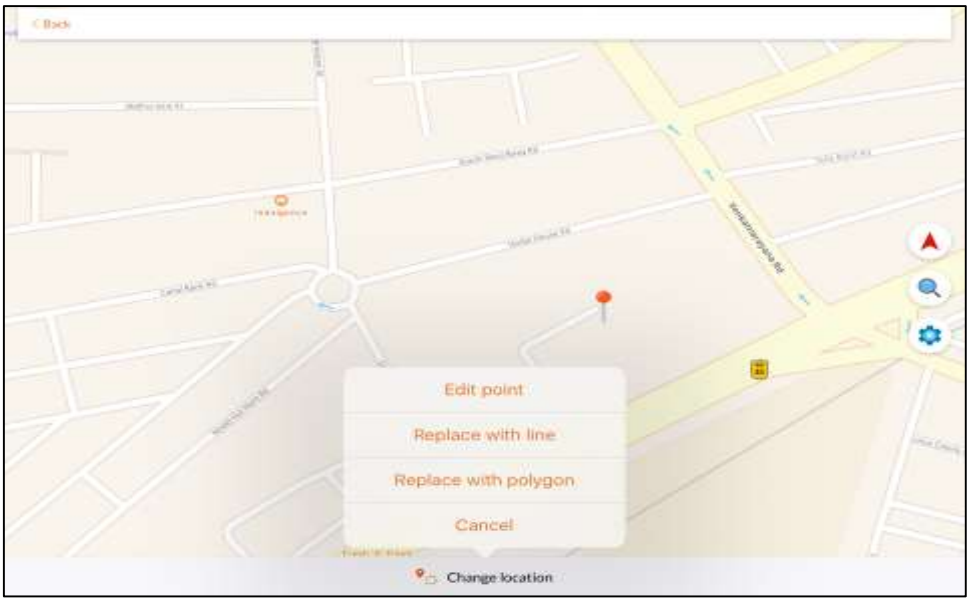


Figure 176: Change Location Options

- **Edit point**: Once you select this option, the map opens displaying a pin marker at your current location.
    - If you want to mark your current location, on the **Capture** tab, press the **Capture** button and press **Done**.

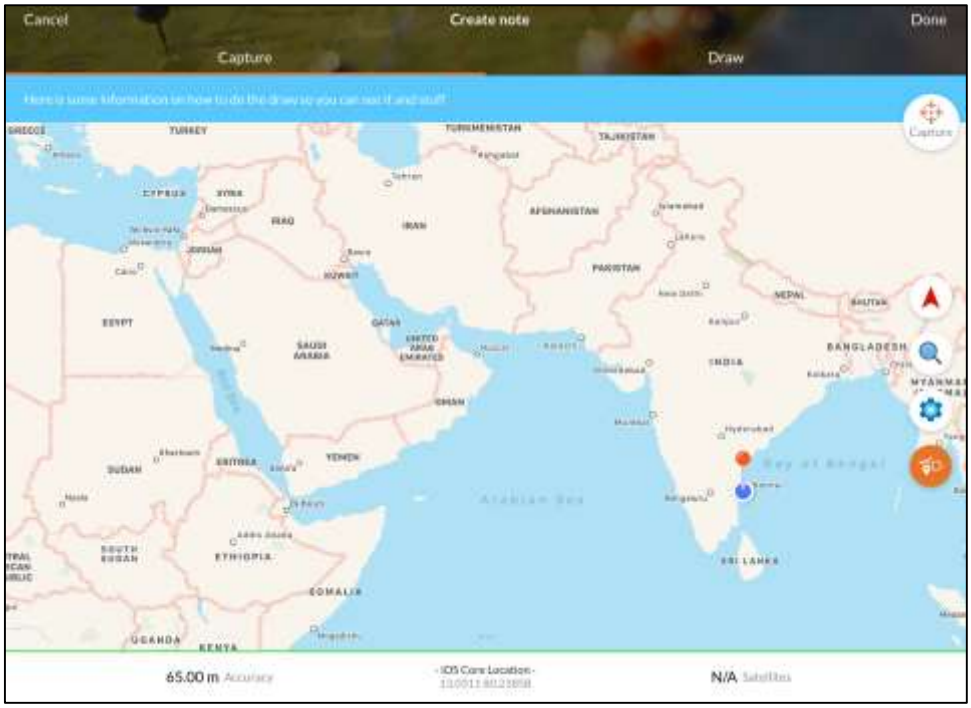


Figure 177: Capture

- Or, if you want to tap somewhere else on the map, on the **Draw** tab, press the **Tap** icon. The Target and Drop options are displayed. With the Target icon selected, the location coordinates of your location are displayed. You can press the Drop icon where you want and a pin marker will be dropped at that point.

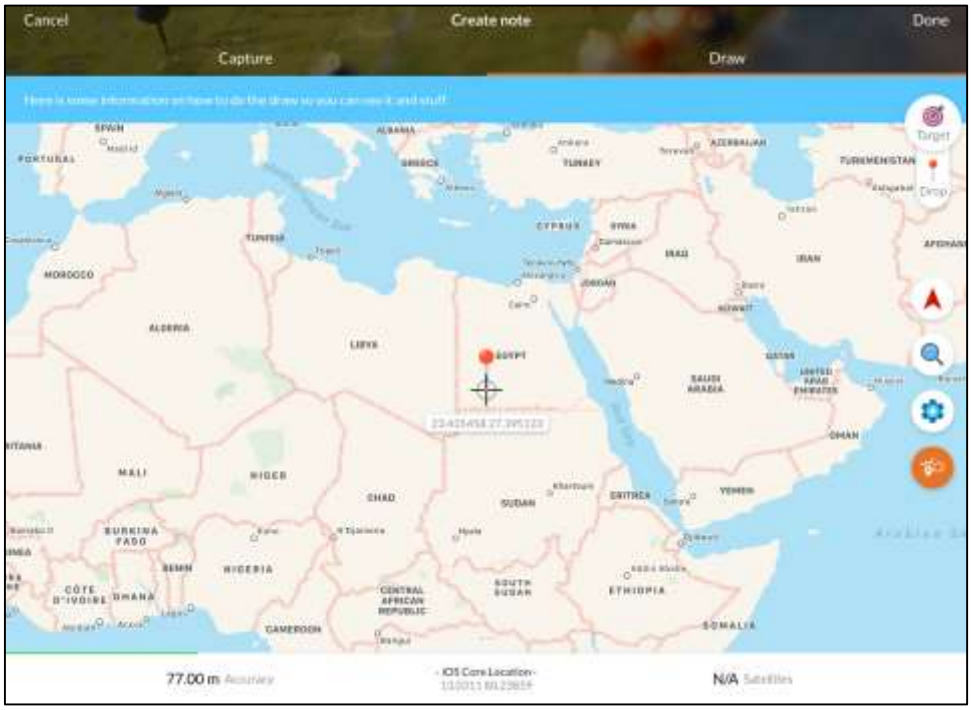


Figure 178: Drop

- If you do not want the location coordinates displayed, press the Target icon, which will enable the Tap icon and disable the Target icon. You can tap anywhere on the map and a pin marker will be dropped at that point. Press **Done**.

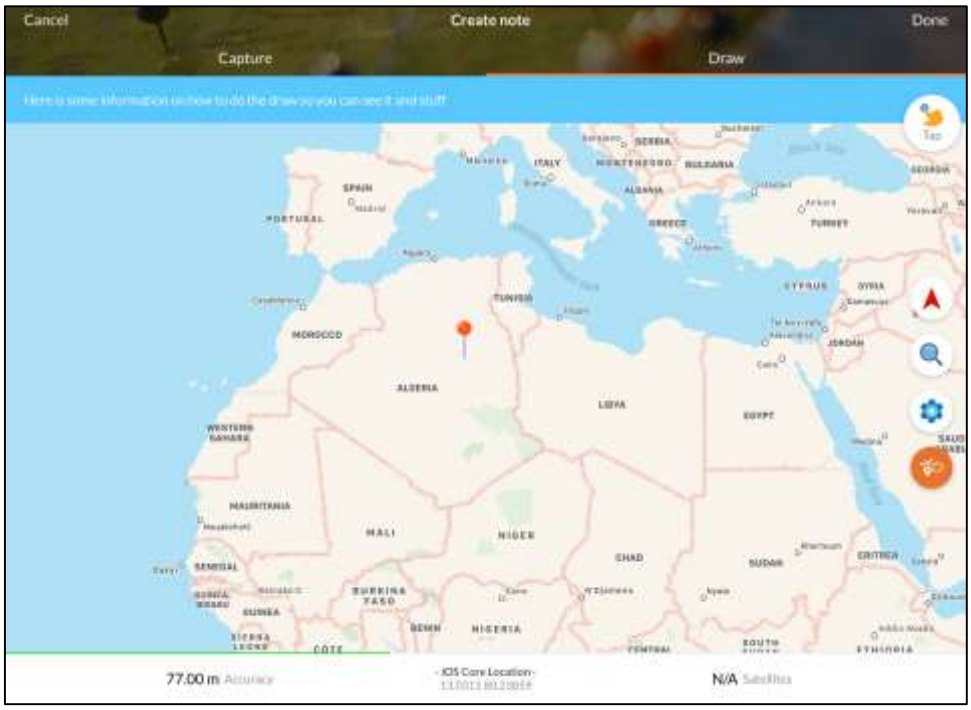


Figure 179: Tap

- The coordinates for the point that you selected are displayed on the Location tab.

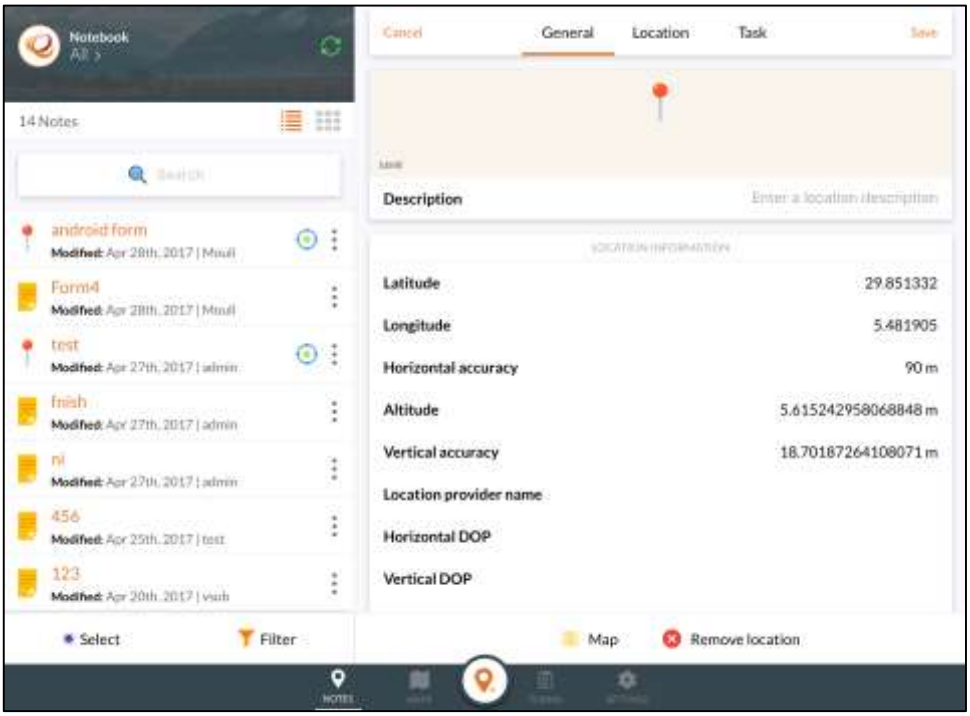


Figure 180: Point – Location Coordinates

Note: If the note type is a polyline, you can only change the location of the polyline. To change it to a point, you must select the Replace options.

- **Replace with line** & **Replace with polygon:** Select these options if you want to change the note type as a polyline or a polygon.

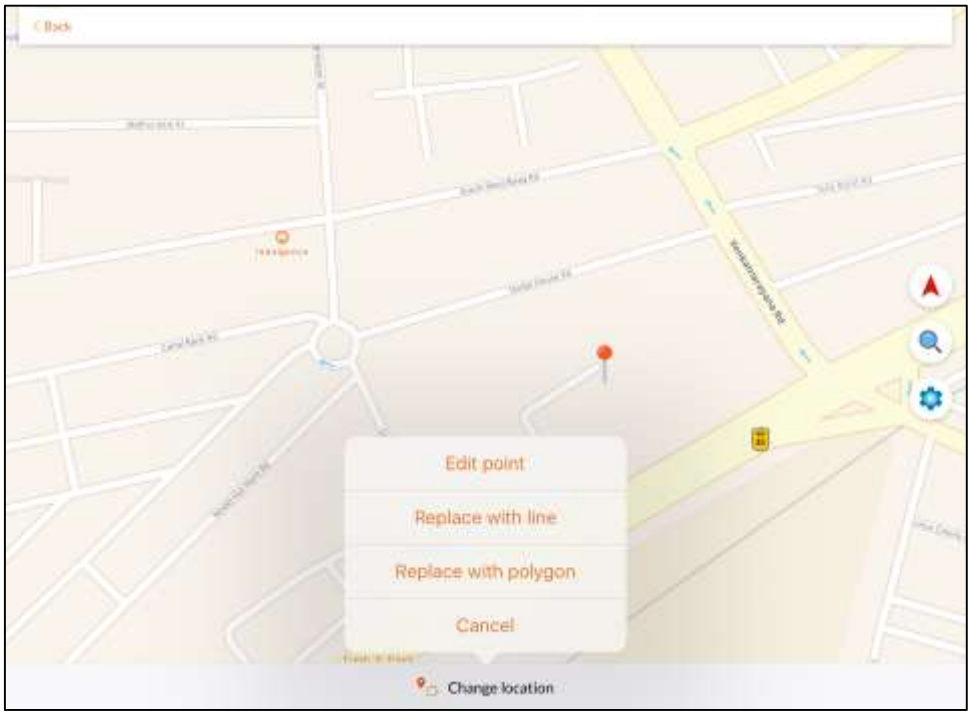


Figure 181: Replace Options

A warning message is displayed if the accuracy is between the specified warning threshold and the restriction threshold, and you will be restricted from capturing the location if the accuracy exceeds the restriction threshold specified in the Location Services Settings.

Note: For example, if the warning threshold is set at 5 meters and the restriction threshold is set at 10 meters, a warning message is displayed if the accuracy is anywhere between 5 and 10 meters and a restriction message is displayed if the accuracy exceeds 10 meters.

- To measure the distance of the lines or the area of the polygons that you draw, toggle on the buttons in the **Measurement visibility** options under **Measurements** in the **Map Settings**.
- On the **Record** tab, press the **Start** button to create lines and polygons tracking your moves. Once you start recording, vertices are created after you cover the distance specified in the Location Settings, based on the refresh rate interval. The distance between each vertex is displayed in the unit that you specified in the settings. If you leave the Record screen, the recording is paused. You can pause and resume your recordings by pressing the Pause button.

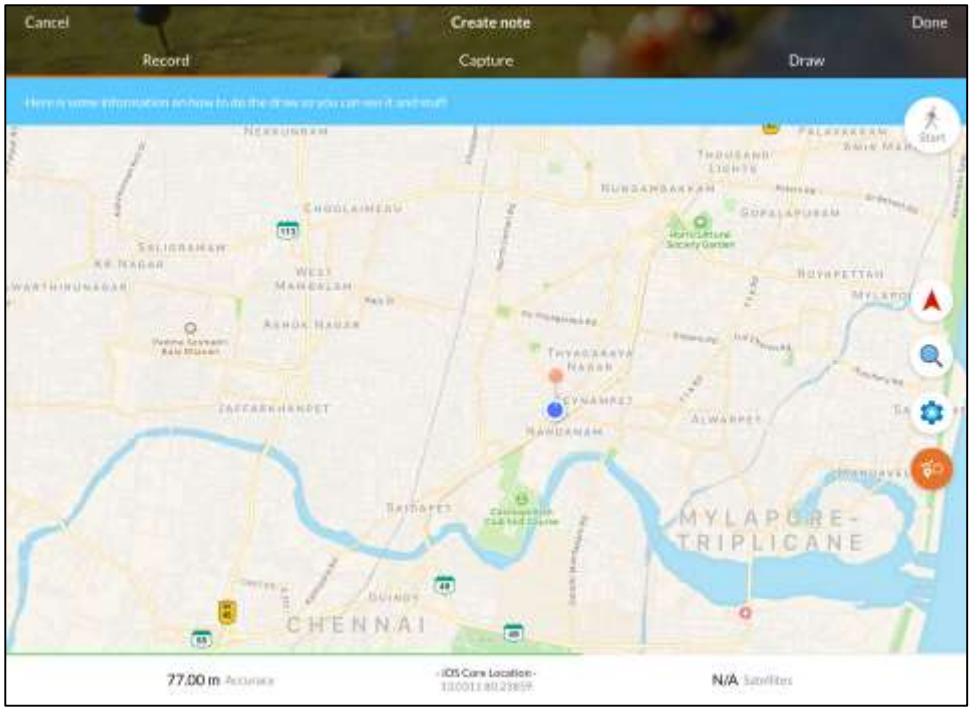


Figure 182: Replace Location – Start Recording

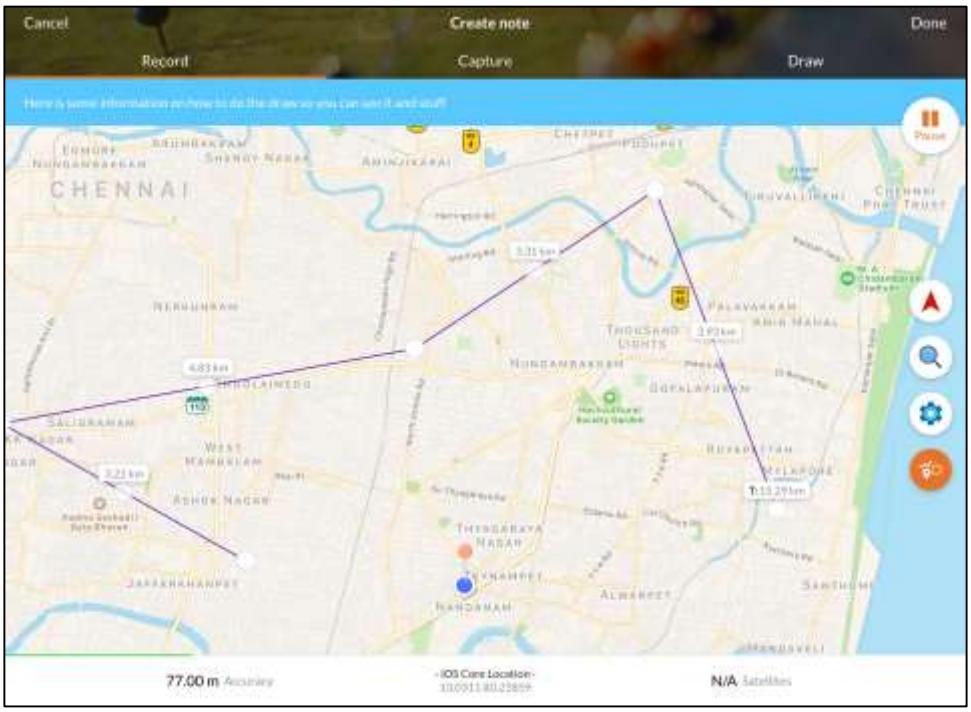


Figure 183: Replace Location – Pause Recording

- To capture your current location during recording, on the **Capture** tab, press the **Capture** button. A vertex is created at your current location. You can then resume your recording on the **Record** tab.

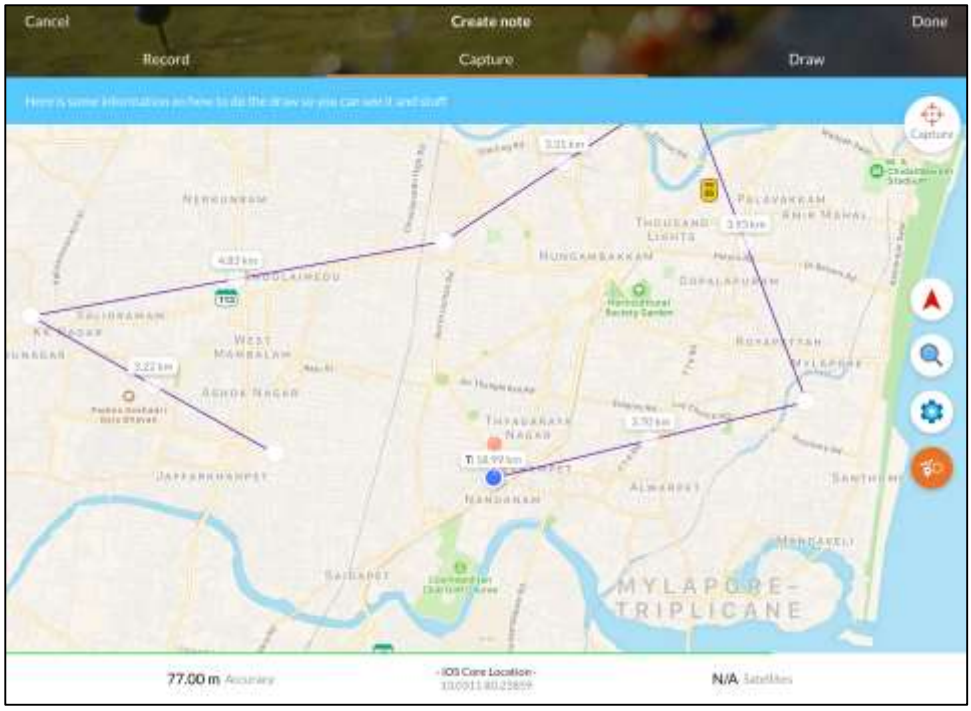


Figure 184: Capture GPS Location

- You can also draw a line or polygon using the **Tap** icon on the **Draw** tab by tapping on the map where you want. If the Target icon is on, the location coordinates of the vertices are displayed on the map and you can drop the pin at the location. You can then resume your recording on the **Record** tab.

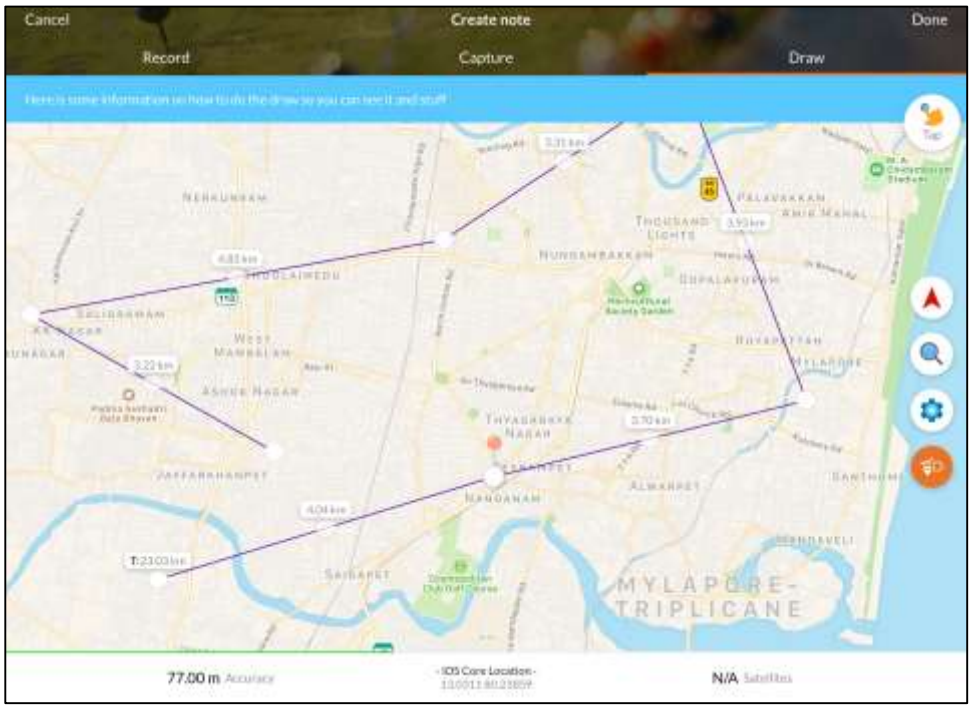


Figure 185: Draw line or polygon - Tap

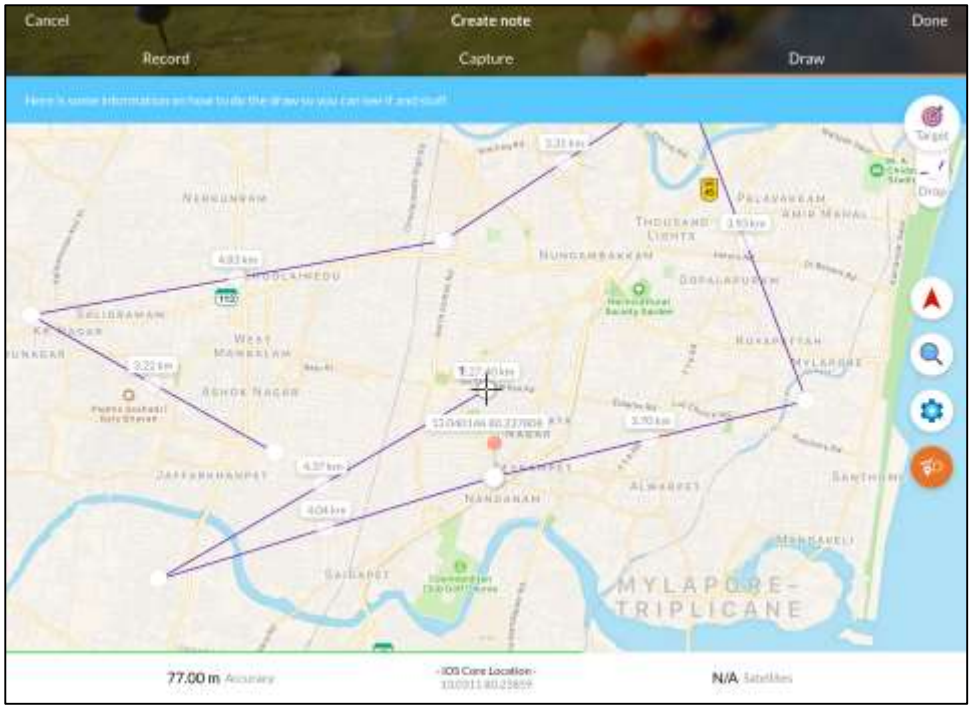


Figure 186: Draw line or polygon - Drop

- Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. If it is a polygon, the area and the perimeter of the polygon is shown. Press Back to go to the Note creation screen.

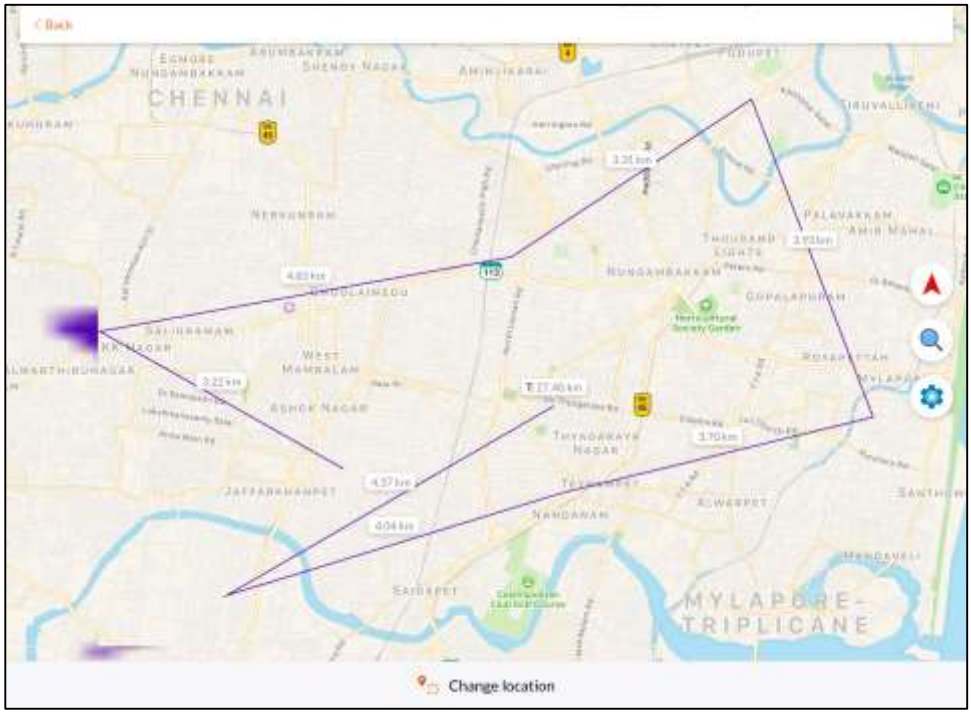


Figure 187: Polyline

- The coordinates for the vertices created during your recording are displayed on the Location tab.

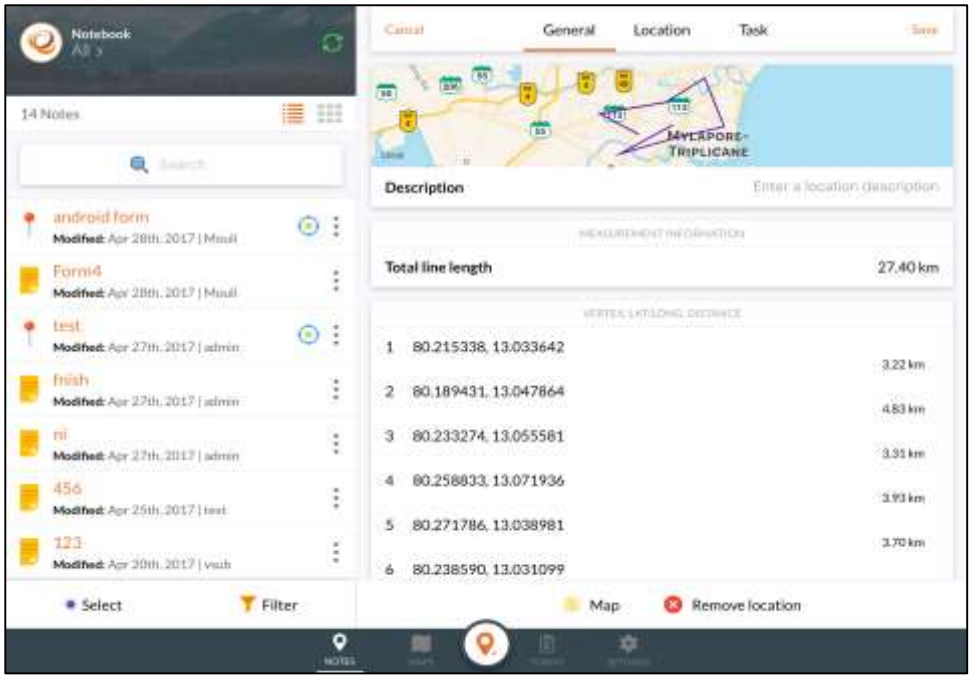


Figure 188: Location Coordinates

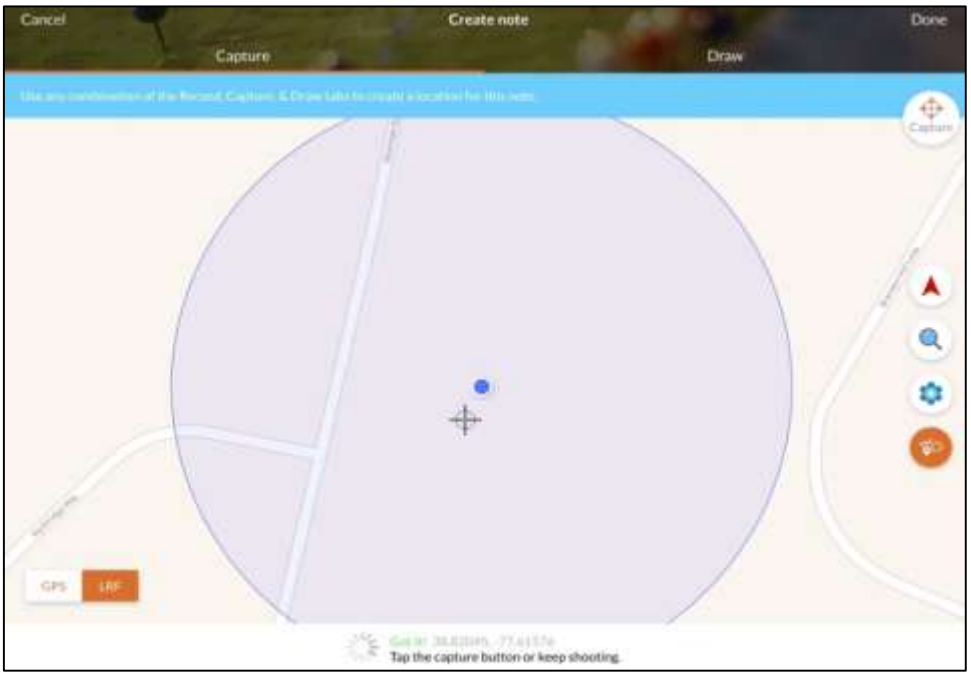
5.1.2. Using Laser Range Finders to Capture Location

Note: The **Enable laser rangefinders (LRFs)** button must be toggled on in Location settings.

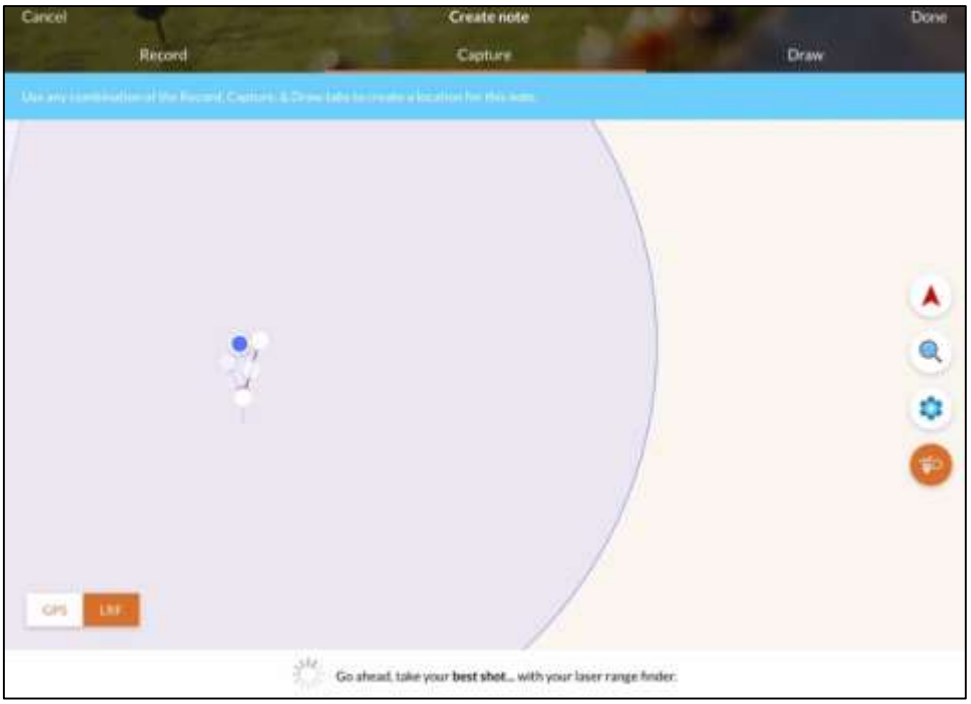
1. Toggle on the **LRF** button at the bottom left of the screen in the capture tab, before you start capturing using the rangefinder.

   Note: By default, **GPS** is toggled on.

2. Once a shot is received from the LRF by Edge and the Capture button is pressed, the captured coordinates are displayed at the bottom of the screen.



3. A pin marker will be dropped at the point you captured. The coordinates for the point that you selected are displayed on the Location tab.
4. You can also draw a line or polygon by using multiple shots. When multiple shots are made, the crosshair icon moves to the new location each time a shot is made.



5. Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. The coordinates for the vertices created during your recording are displayed on the Location tab.

5.1.3. Adding Resources to a Note

1. You can add the following resources to a note from the **Attachments** panel:
    - Form
    - Video
    - Audio
    - Photo
2. You can attach multiple resources to a note. When you do not make any resource attachments to the note, then the resource type of the note will be a text note, by default.

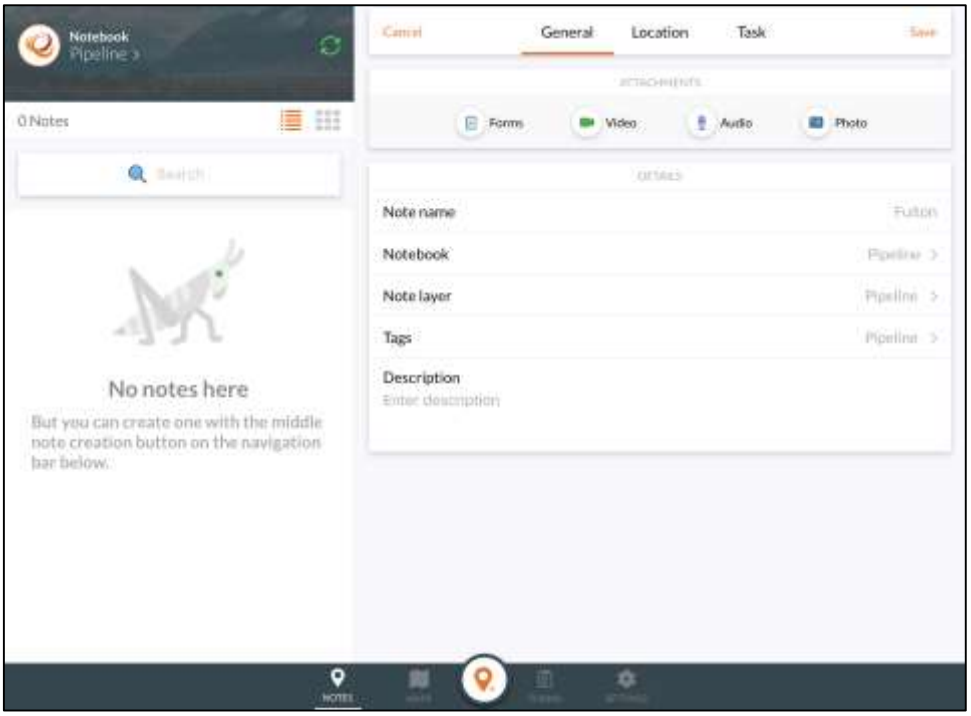


Figure 189: Resource types in a note

3. **Photo:** Press this icon to insert a picture in the note. You can either take a photo using the **Take Photo** option or you can use an existing picture from the library using the **Choose from library** option. To exit the popup menu, press the **Cancel** option.

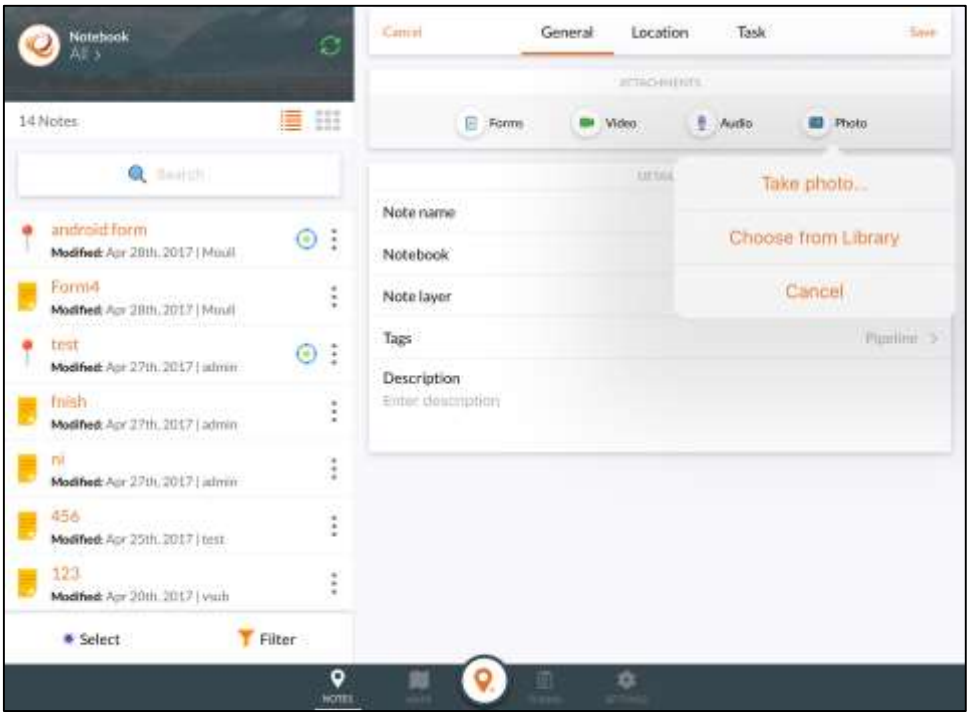


Figure 190: Photo

4. Once you take a photo, press **Use photo**. If you choose from library, select the photo. The Photo is now attached to the note. Click on the photo name to view the photo. A preview of the photo is displayed. You can attach multiple photos to a note. To attach another photo, press the Photo icon.

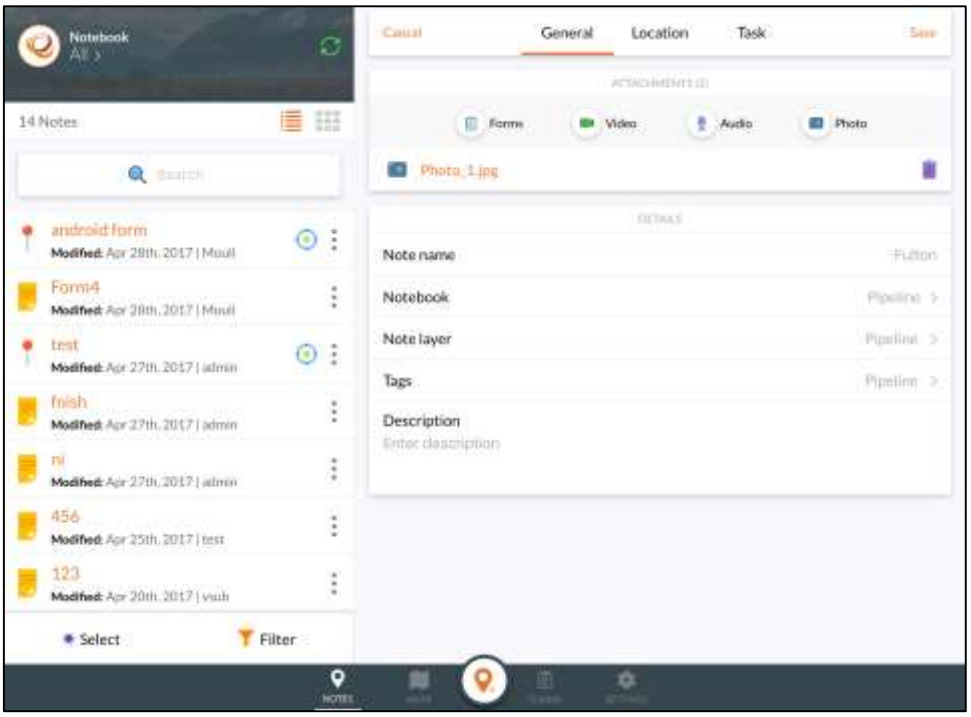


Figure 191: Photo attached in the note

- To view the details and the location coordinates of the photo, press the Details button.

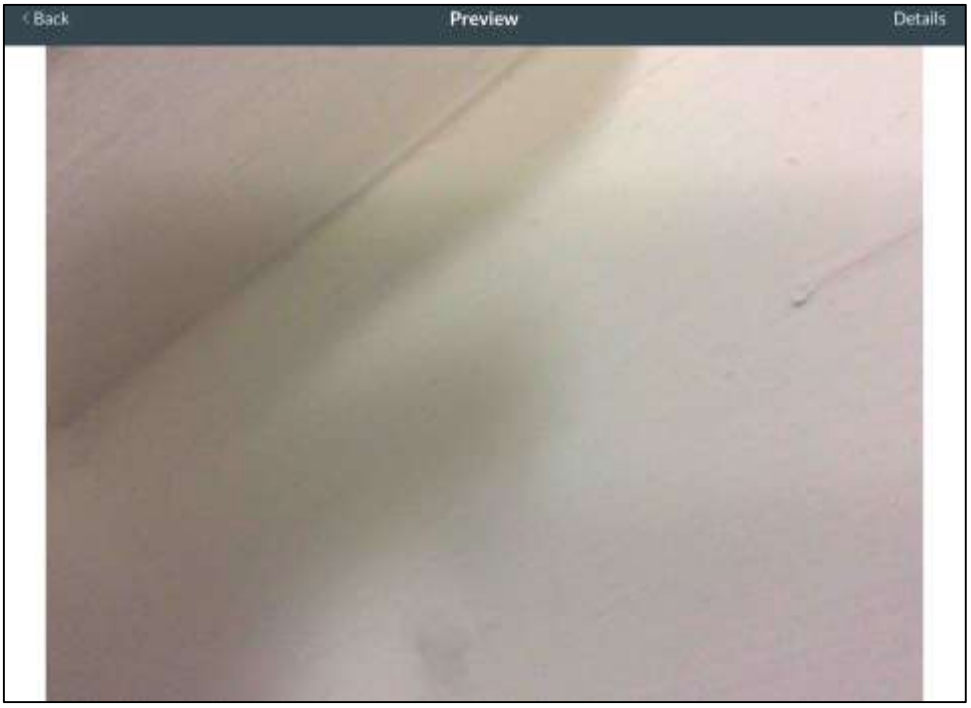


Figure 192: Photo preview

- The **General** tab displays information such as orientation, image length and width, and model and make of the camera used. The **GPS** tab displays the location coordinates of the place the photo was taken. Press the Back button to return to the note.

Figure 193: Photo – General & GPS Details

5. **Video:** Press this icon to insert a video in the note. In the popup menu that opens, you can either take a video using the **Take video** option or you can use an existing video from the library using the **Choose from Library** option. To exit the popup menu, press the **Cancel** option.

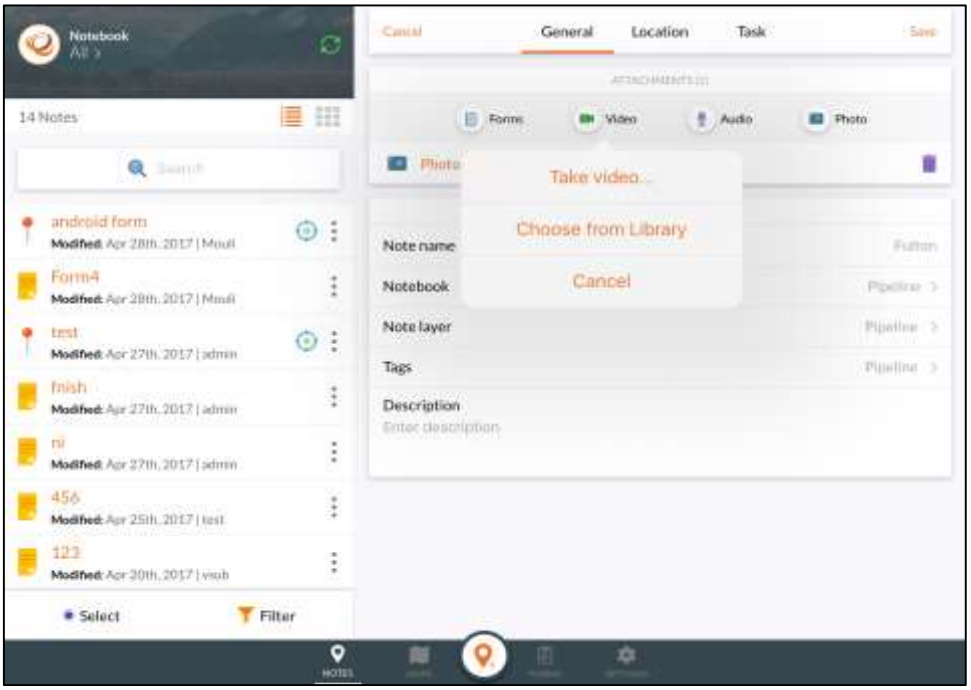


Figure 194: Video

- The video is now attached to the note. Click on the video name to view the video. You can attach multiple videos to a note. To attach another video, press the Video icon.

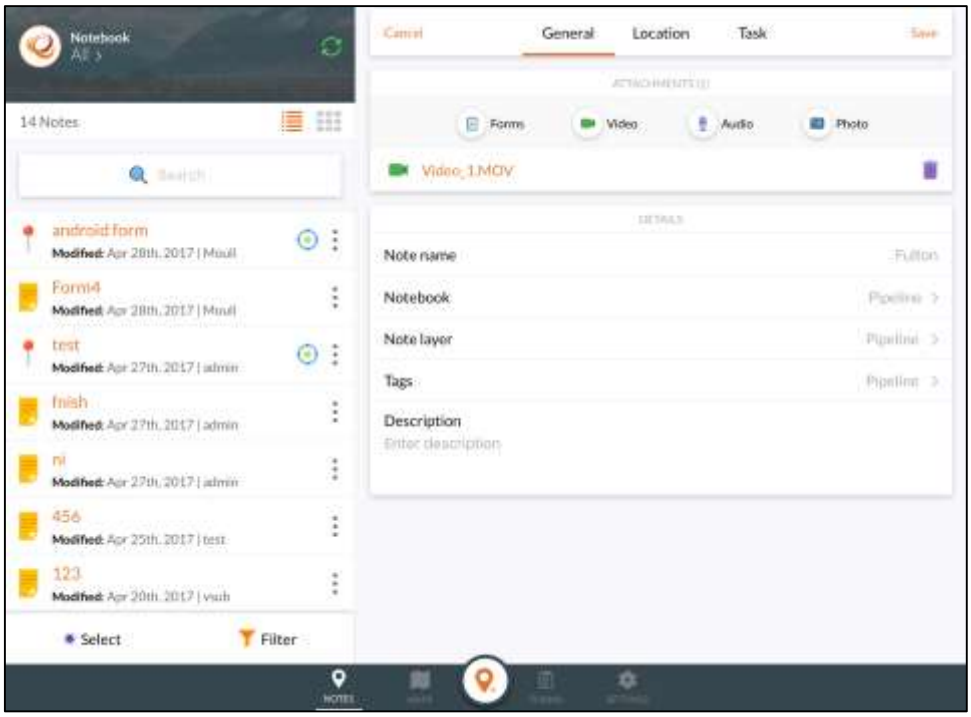


Figure 62: Video attached to note

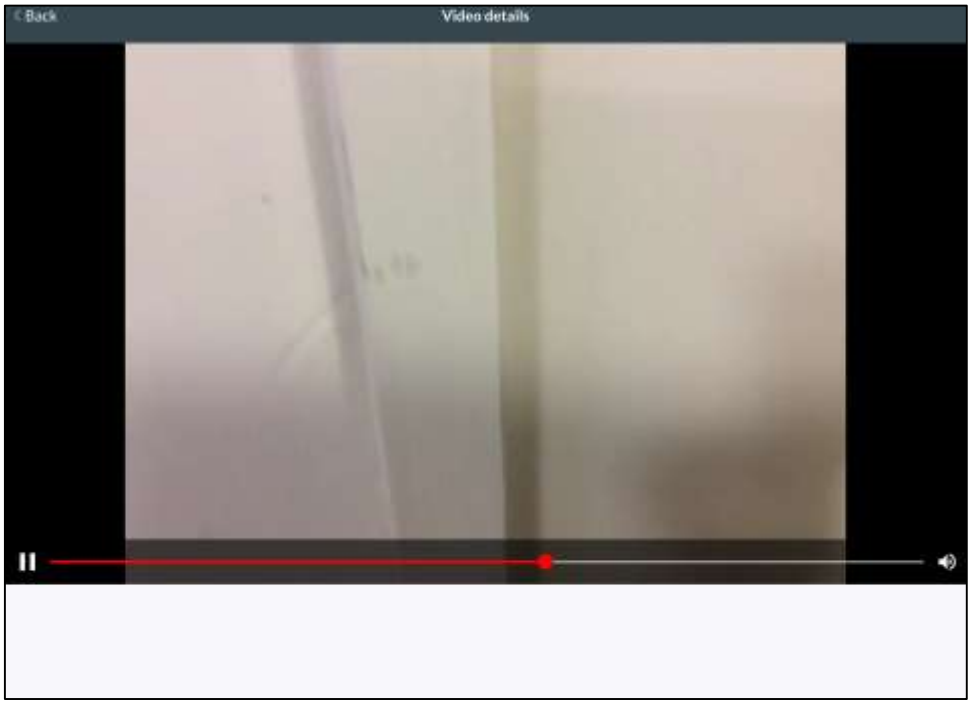


Figure 195: Video preview

6. **Audio:** Press this icon to insert an audio in the note. The **Ready to record** menu opens with **Record** and **Done** buttons. Press the **Record** button to start recording and Pause button to stop recording. Press the Done **button** to return to the note. To exit the **Ready to record** menu, press **Cancel**.

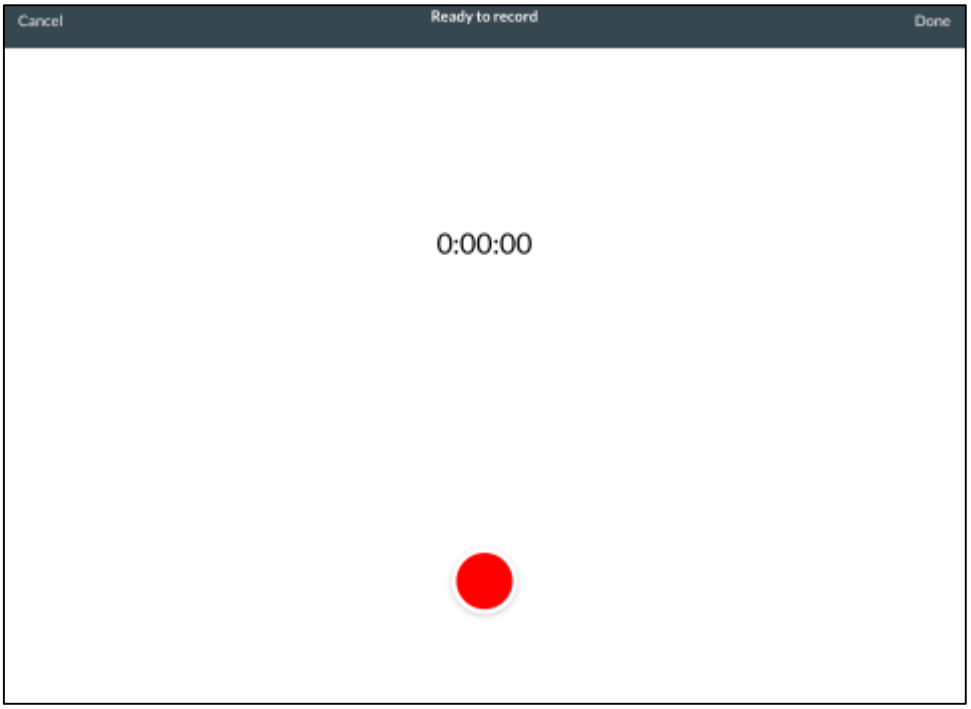


Figure 196: Start recording

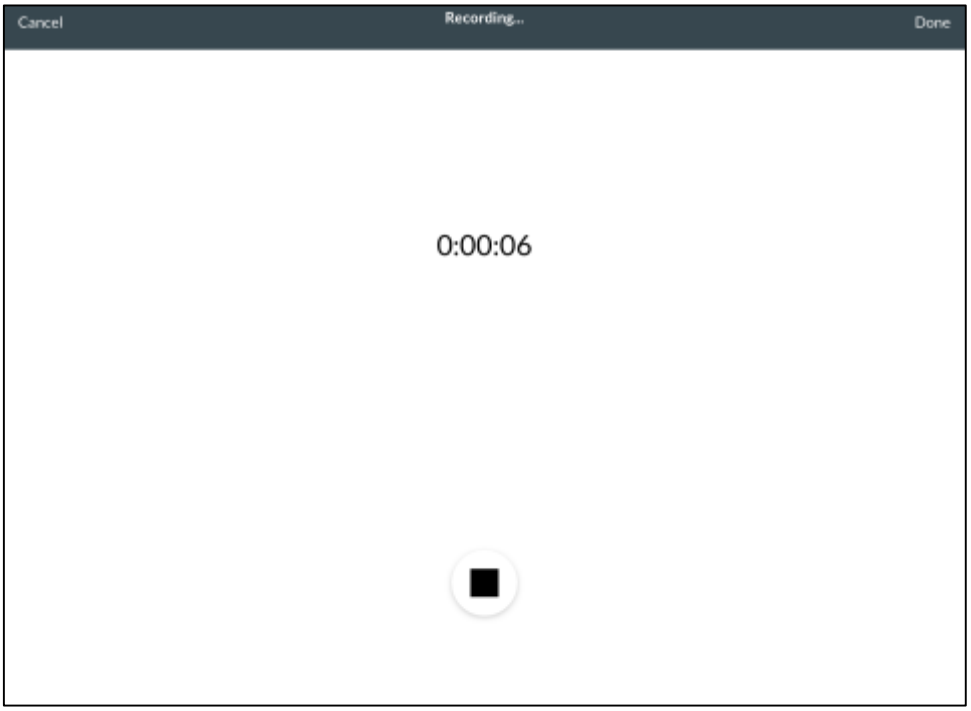


Figure 197: Stop recording

7. The audio is now attached to the note. Click on the audio name to listen to the audio. You can attach multiple audios to a note. To attach another audio, press the Audio icon.

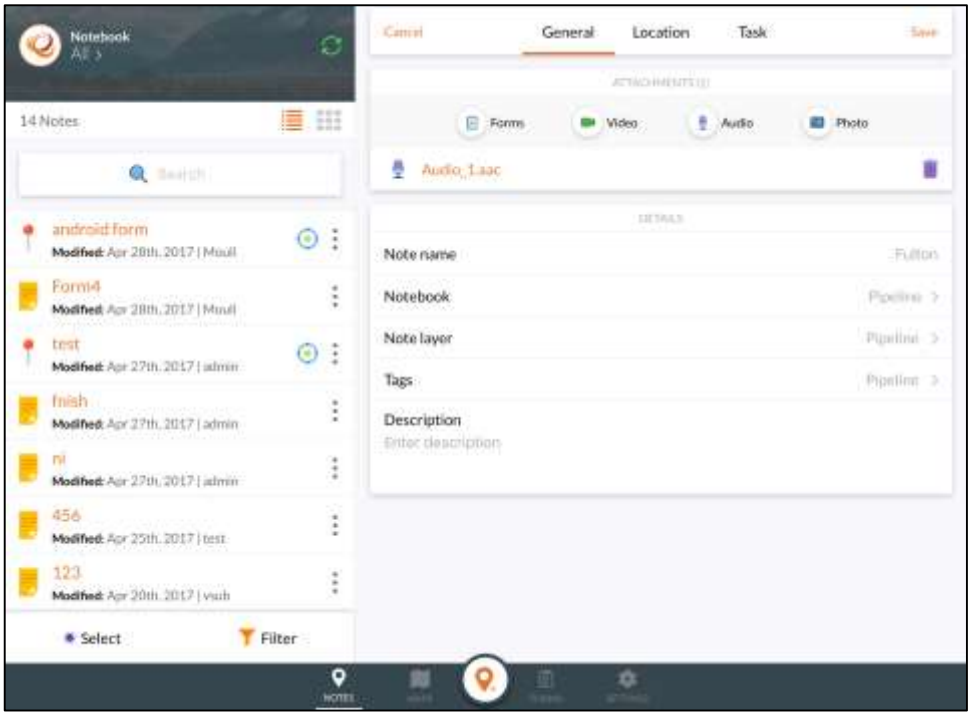


Figure 198: Audio attached to note

Figure 199: Audio preview

5.1.4. Adding Forms to a Note

1. Press the Forms icon to insert a form. The Form templates screen opens displaying all the available forms.

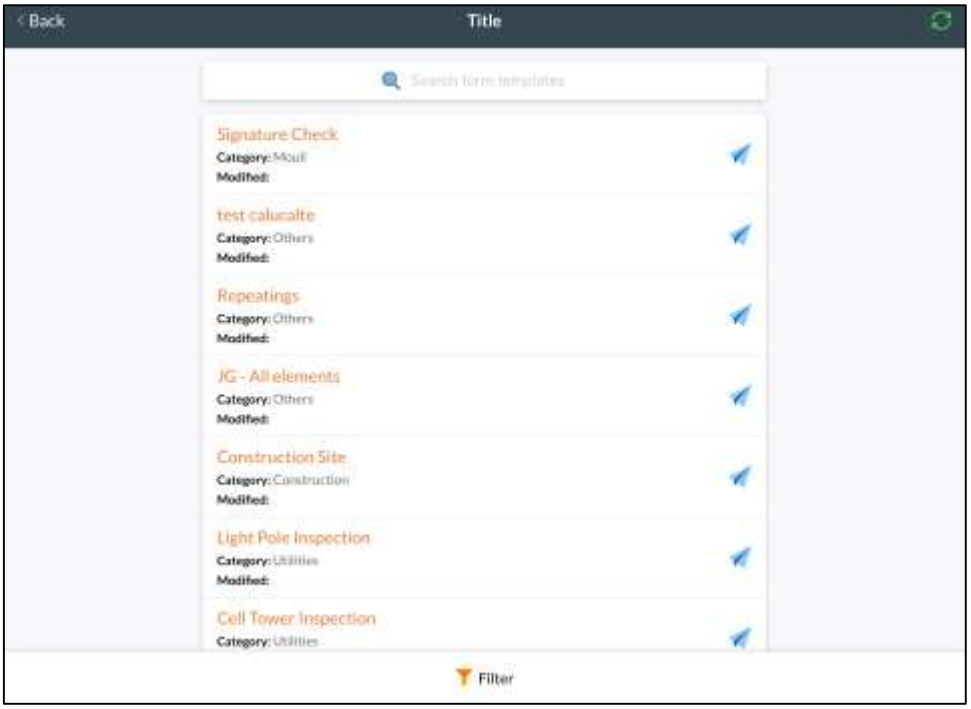


Figure 200: Select Form template

2. Select a form and enter the required details in the form.
3. Press the Send icon to save the form that you attached as a PDF file. The preview is displayed as shown below. Press the Share icon to share the file through mail. Press **Done** to return to the note.
4. Forms include repeating fields and field groups, validating fields for websites and emails, calculation fields, conditional fields, and barcodes. To repeat a field or field group, press the **Repeat** icon on the right side of the field.

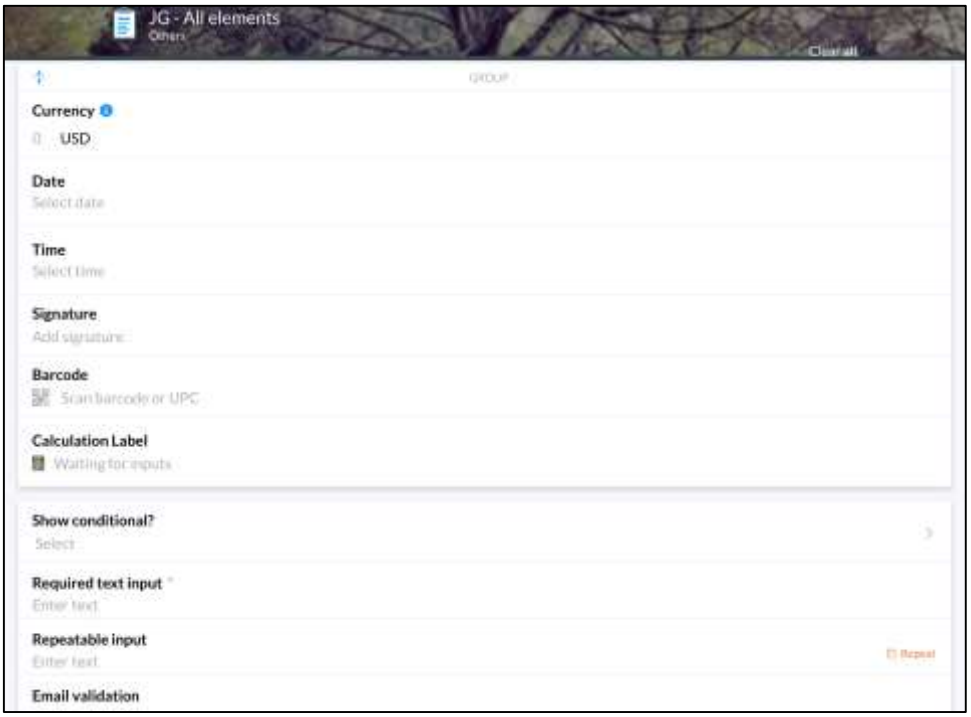


Figure 201: Enter details

5. For entering MAC addresses, you can either scan or enter the barcode manually in the **MAC Address** screen that opens.
6. If the scanned value does not match a MAC address, an alert message is displayed allowing you to **Rescan** or **Edit manually**. The MAC address should be a 16-digit alphanumeric value and contain only 0-9 and A-F characters.

   Note: This MAC address validation is done only if the MAC address field is set for MAC address validation for the selected form in the server, thus ensuring that the MAC address is not duplicated and is a 16-digit alphanumeric value and contains only 0-9 and A-F characters.
7. If you choose to **Enter manually**, you will be prompted to enter a valid MAC address and then retype to confirm.
8. If you choose to **Rescan**, once the scan is complete, the scanned value is displayed.
9. Press **Done** to return to the form. The scanned value will be entered in the form.
10. Press **Clear all** to delete all the details that you entered. Press **Cancel** to go back to the Note creation screen without attaching any form.

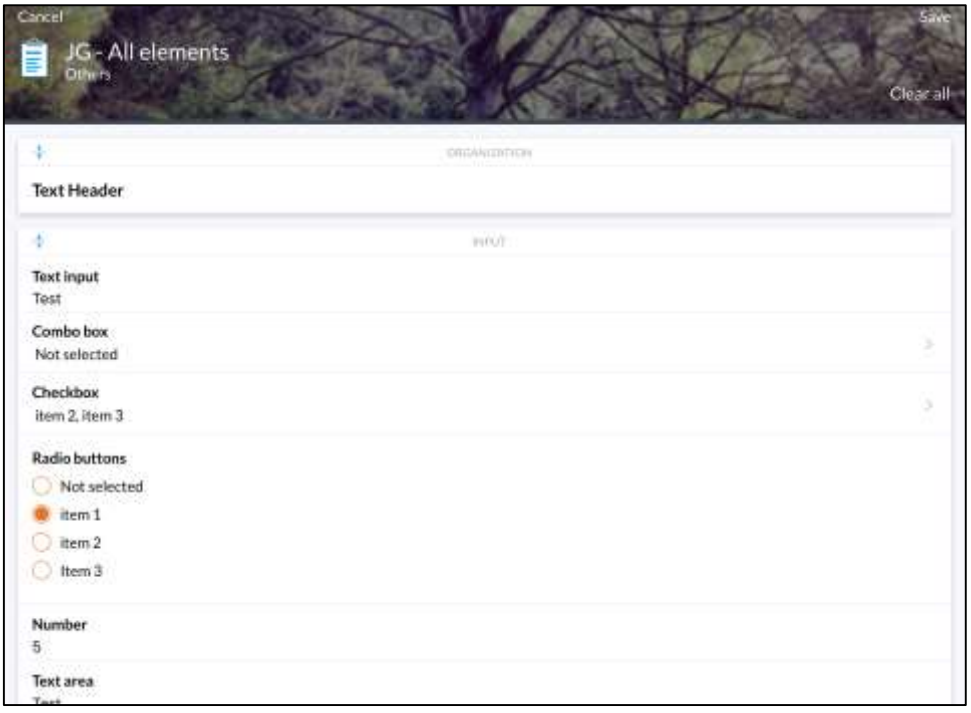


Figure 202: Enter form details

11. Press **Save** on the top right corner of the screen. You will return to the note creation screen. The form is now attached to the note.

    Note: You can attach multiple forms or resources to a note.

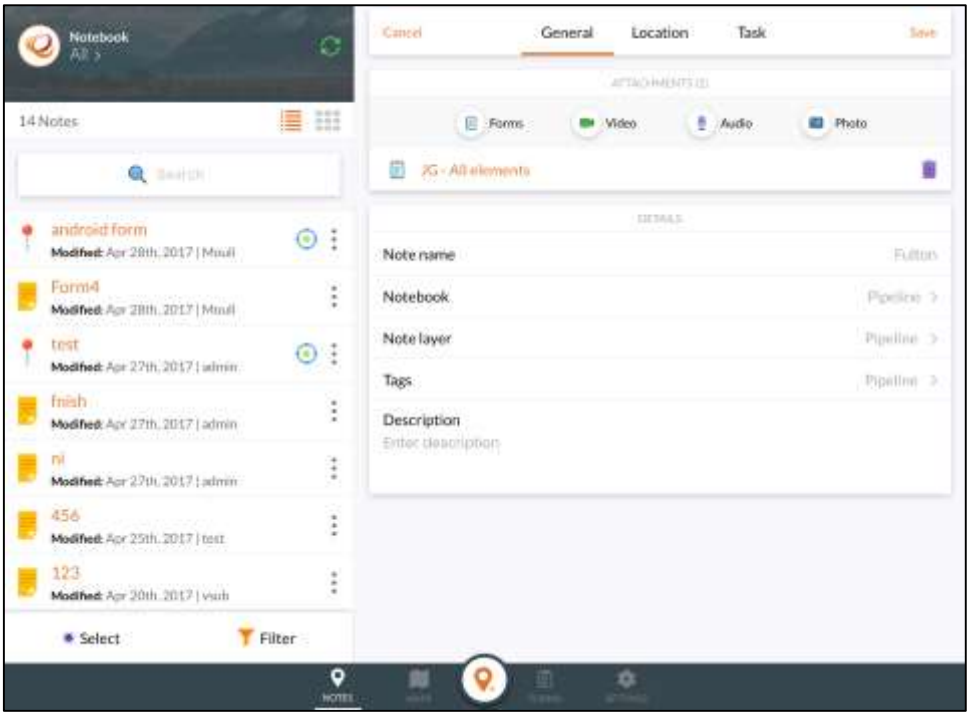


Figure 203: Form attached in a note

12. To attach another form or another resource, press the corresponding icon in the **Attachments** section.
13. To remove the form that you attached, press the **Delete** icon near the form.
14. Press **Save** to save the created note.

5.2. Adding Tasks

1. On the **Task** tab, toggle on the **Enable task** button.
2. In the **Due Date** field, select the due date for the task to be created.
3. In the **Status** field, select the status of the task from the following options:

   - **Completed**
   - **Assigned**
   - **In progress**

4. In the **Assigned to** field, select the user to who you want to assign the task.

   Note: Once you assign the task, a notification is displayed in the device which is logged in by the assigned user. The user can specify in the settings if the notification should be displayed as an alert or as a banner.

   When the user clicks the notification and if the device already has the task note, the Task note tab of the particular note opens. If the Task Note is not yet downloaded in the device, the following alert message is displayed: The task note is assigned to this Notebook. This Notebook has not been downloaded yet. Would you like to get it? Once the user clicks **'Download'**, the Notebook is and the downloaded task note in the Notebook is highlighted with the Notes list focused to it.

5. Press **Save**.

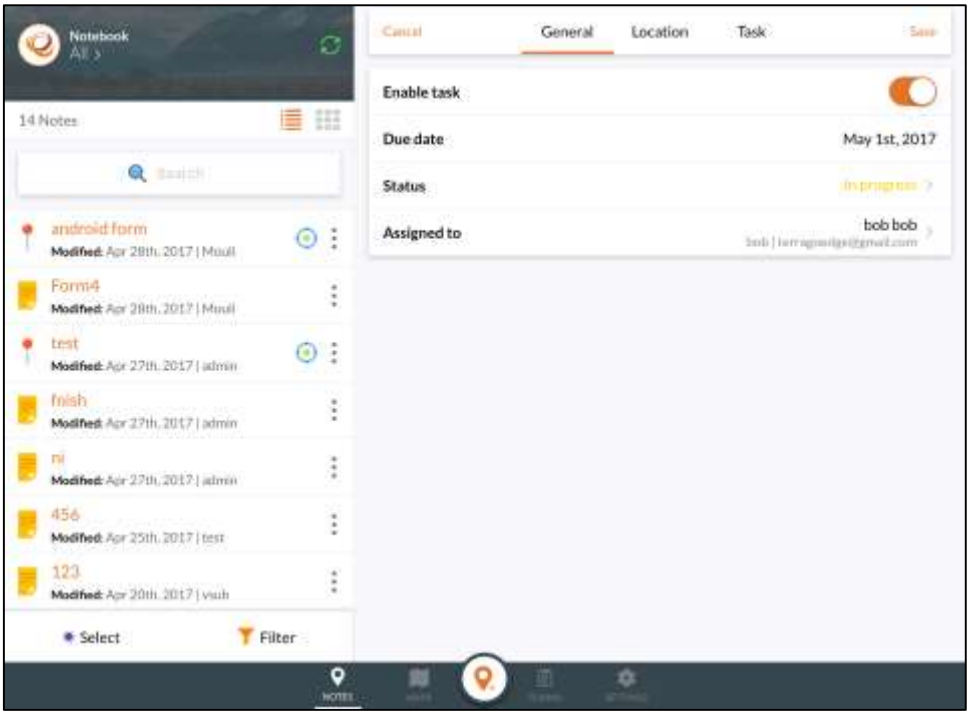


Figure 204: Tasknote

6. The note is now saved in the notebook that you selected.

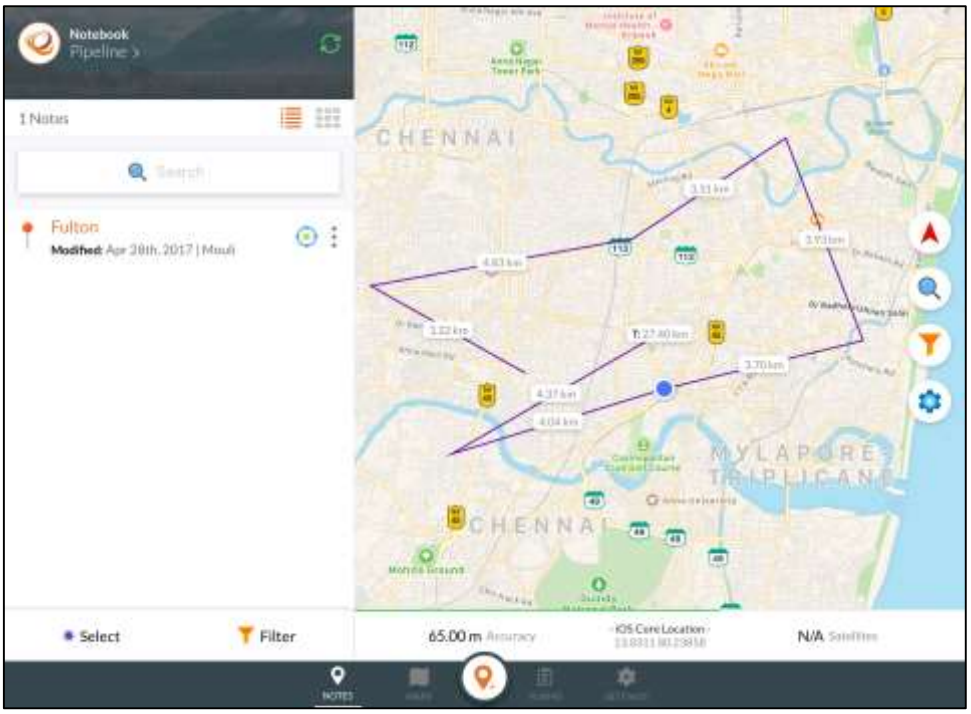


Figure 205: Note saved

5.3. Creating a Cloned Note

Using the clone option, you can create multiple notes with the same information.

1. Open the note that you want to clone, and press the **Make a copy** button at the top right corner.

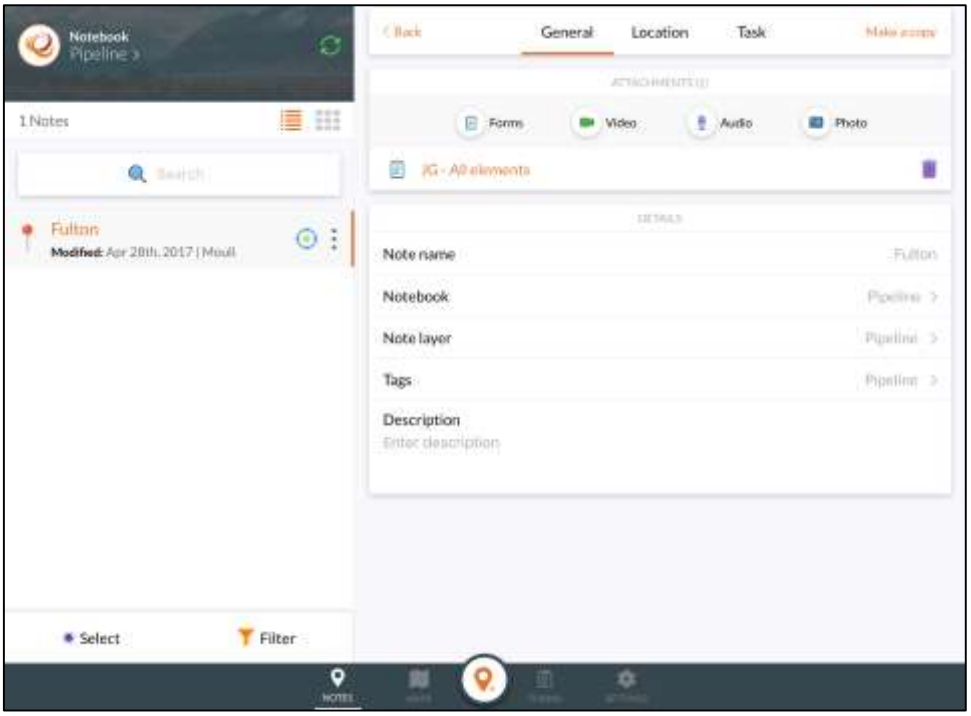


Figure 206: Make a copy

2. The note opens displaying all the information from the previously saved note such as note name, description, tags, and layer if applicable including the attached resources.
3. You can now enter the note name and add resources or location. Press the **Save** button to save the note.

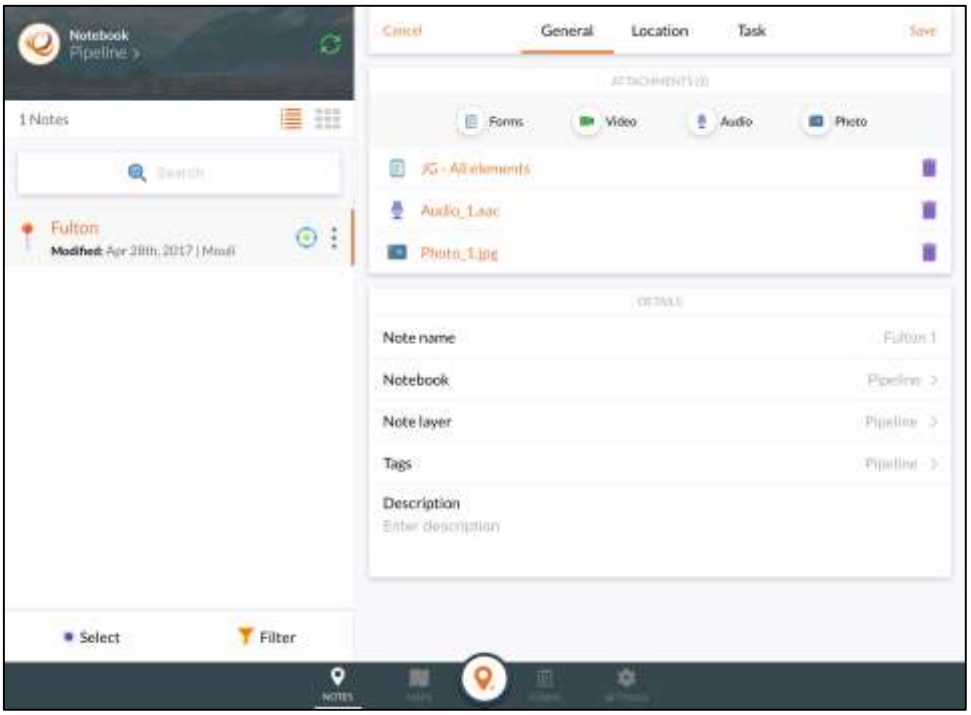


Figure 207: Creating Cloned Note

4. All the notes that you created are displayed in the Notes section.

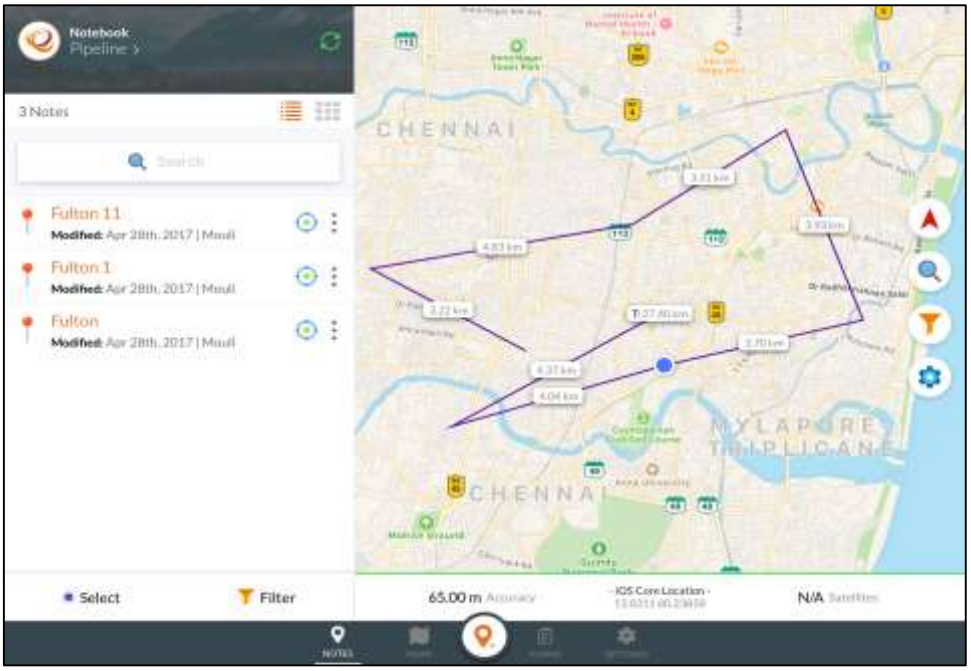


Figure 208: Notes

5.4. Creating a Quick Note

1. **Quick Note:** Press the Quick Launch Icon at the bottom center of the screen and select the **Quick note** option and press at the location where you want to create the quick note. **Note**: The Quick note option will be available only if it is enabled in the selected notebook.
2. This option allows you to create a quick note with the assigned form template in the respective notebook. Enter the details in the form template that opens and press **Save** at the top right corner of the screen.

Figure 209: Form details

3. Your quick note is now created in the respective notebook with the note name as specified in the corresponding notebook settings.

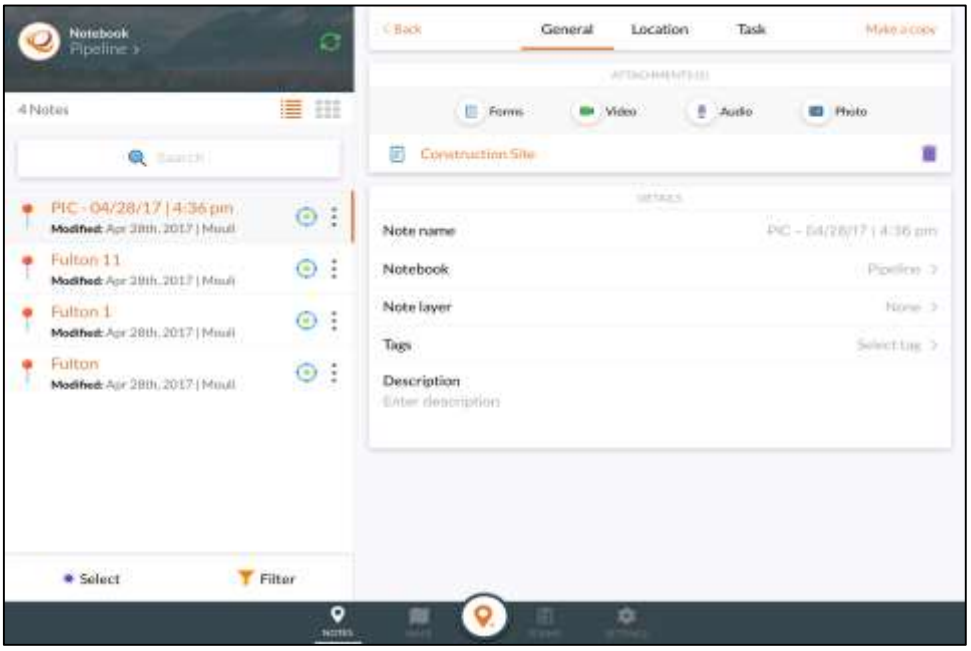


Figure 210: Quick note created

5.5. Creating a Form Note

Quick form notes are created with the assigned form template in the respective notebook.

1. To create quick form notes, select the **Notebook** in the Notebooks section.
2. Now, press the Quick launch icon and select the **Form** icon. The screen displays the forms assigned to the selected notebook.

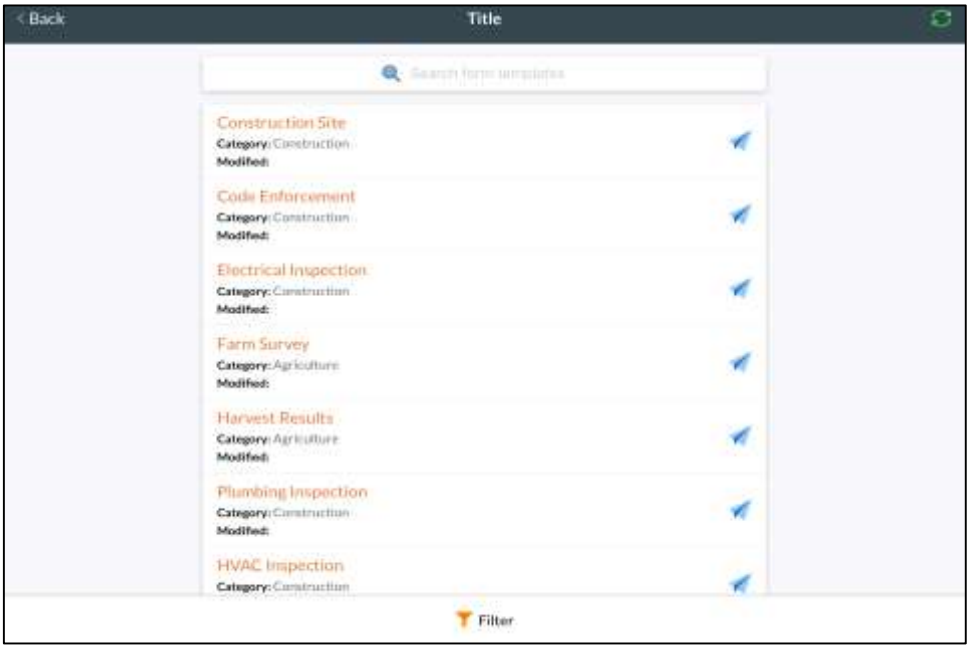


Figure 211: Form list

3. Select the form template and enter the required details.

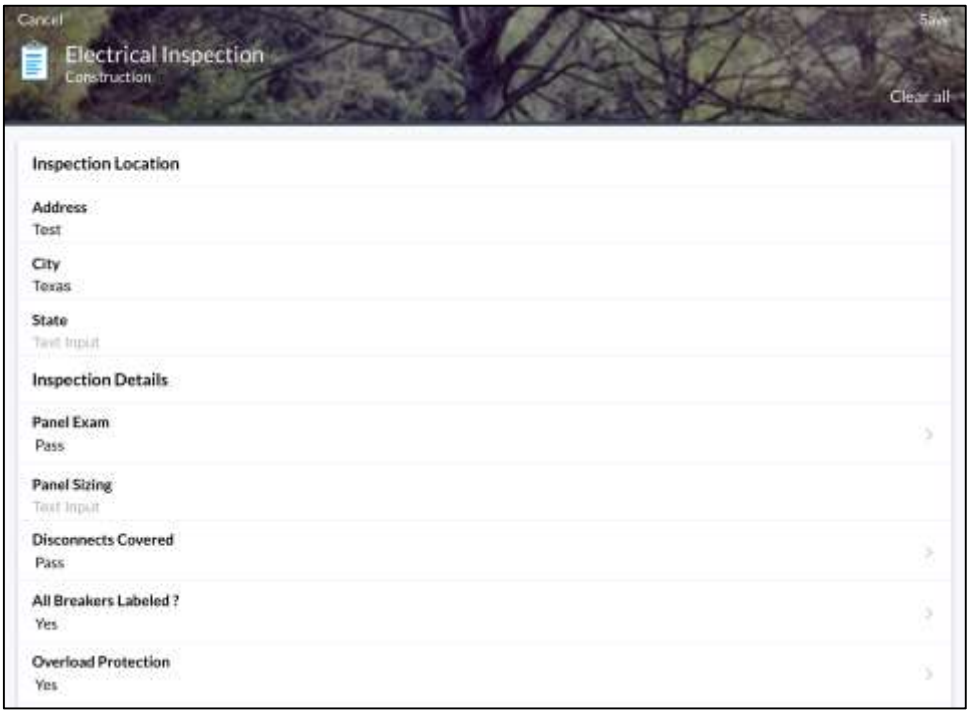


Figure 212: Form template

4. If the **Location proximity validation** is specified in the server and if the location proximity exceeds the specified value, a warning or restriction message is displayed. If the warning settings are specified, a warning message is displayed in yellow when your current location is further away from the note's location and exceeds the warning value. You can dismiss the message and save the form. Similarly, if the restriction settings are specified, a restriction message is displayed in red when your current location is further away from the note's location and exceeds the restriction value. You'll be restricted from saving the form details.

13. For entering MAC addresses, you can either scan or enter the barcode manually in the **MAC Address** screen that opens.
14. If the scanned value does not match a MAC address or is already scanned and assigned for another fixture, an alert message is displayed allowing you to **Rescan** or **Edit manually**.

    Note: This MAC address validation is done only if the MAC address field is set for MAC address validation for the selected form in the server, thus ensuring that the MAC address is not duplicated and is a 16-digit alphanumeric value and contains only 0-9 and A-F characters.

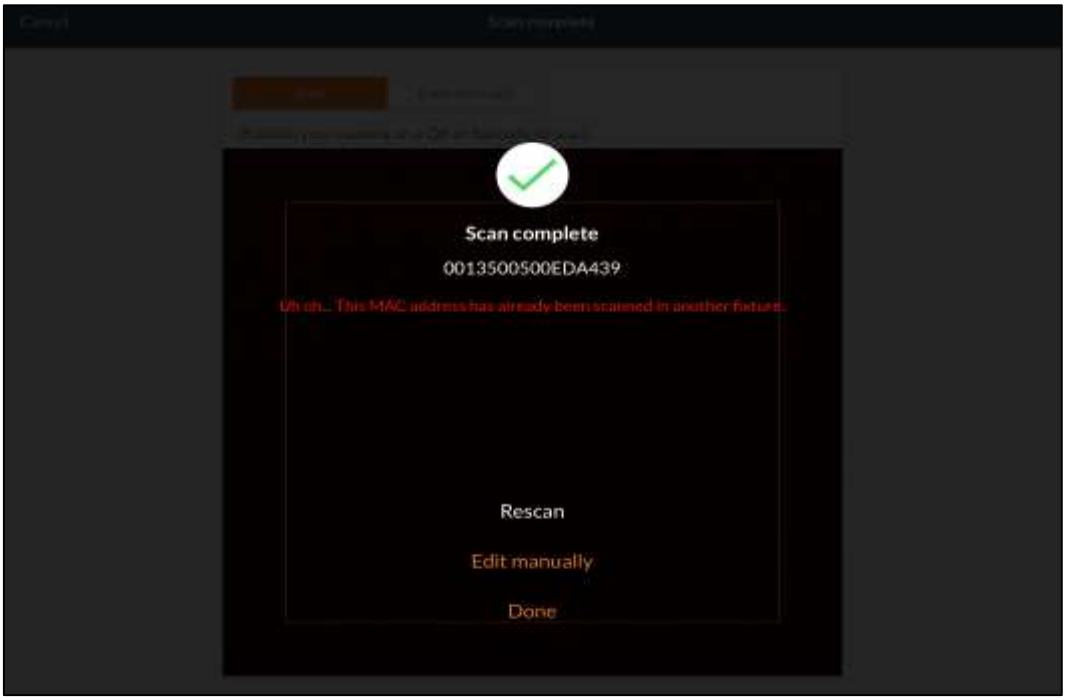


Figure 213: Invalid MAC address

15. If you choose to **Enter manually**, you will be prompted to enter a valid MAC address and then retype to confirm.

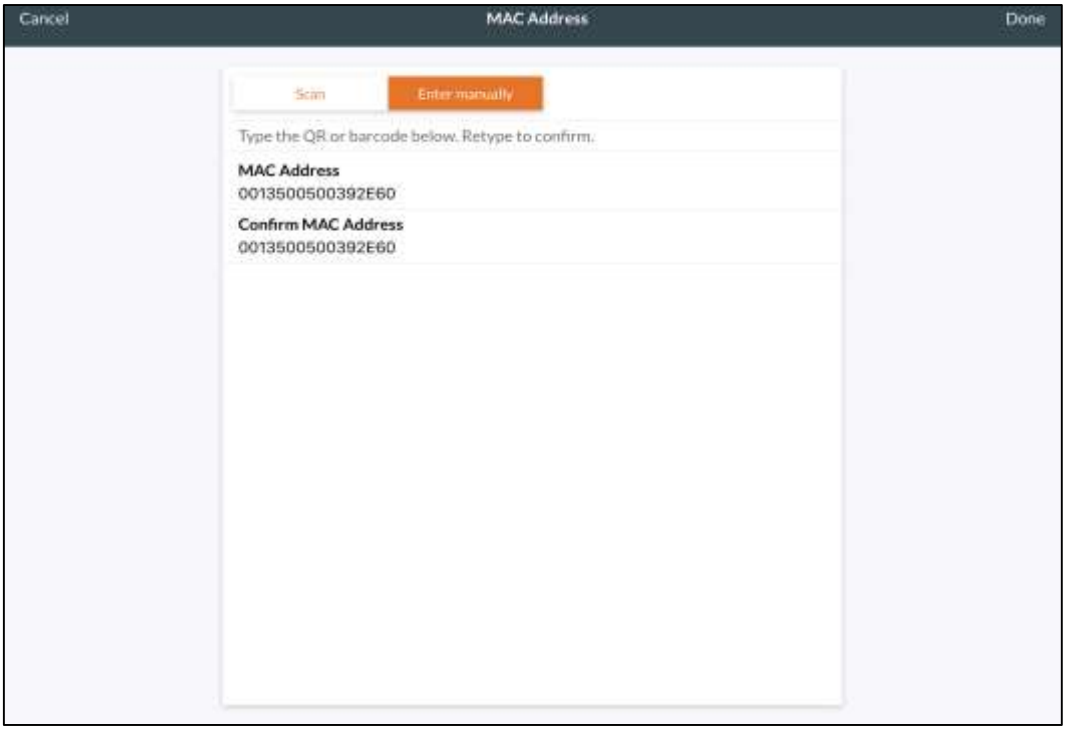


Figure 214: Enter manually

16. If you choose to **Rescan**, once the scan is complete, the scanned value is displayed.
17. Press **Done** to return to the form. The scanned value will be entered in the form.

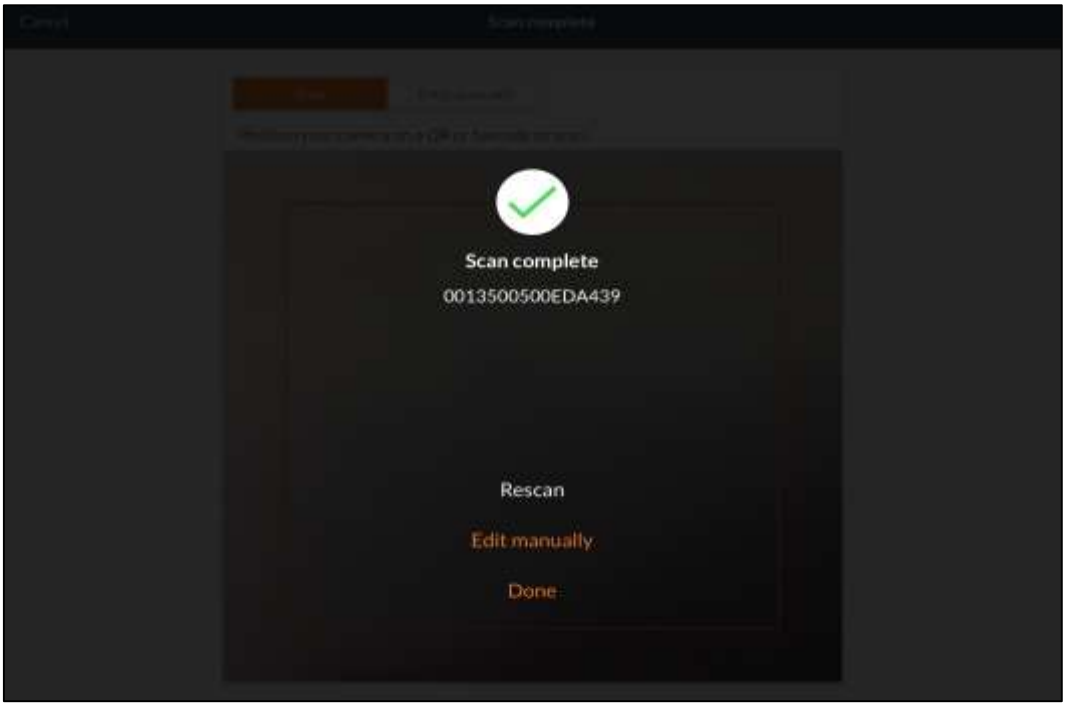


Figure 215: Scan complete

5. Press **Save** on the top right corner of the screen. You will return to the note creation screen. The form is now attached to the note. To remove the form that you attached, press the **Delete** icon near the form.
6. You can attach multiple forms or resources to a note. To attach another form or another resource, press the corresponding icon in the **Attachments** section.
7. Enter the Note name and other details such as location and task, if required.
8. Press the **Save** button to save the created note. The note is saved in the Notebook that you selected.

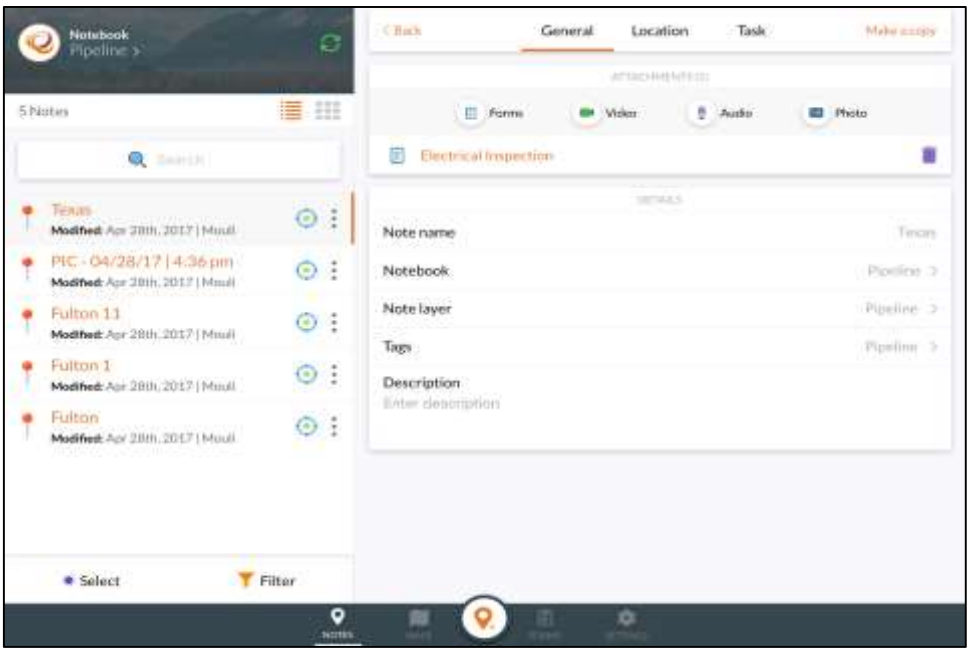


Figure 216: Form note created

5.6. Creating a Photo Note

1. Press the Quick Launch Icon at the bottom center of the screen and select the **Photo** icon.
2. In the popup menu that opens, you can either take a photo using the **Take Photo** option or you can use an existing picture from the library using the **Choose from library** option. To exit the popup menu, press the **Cancel** option.

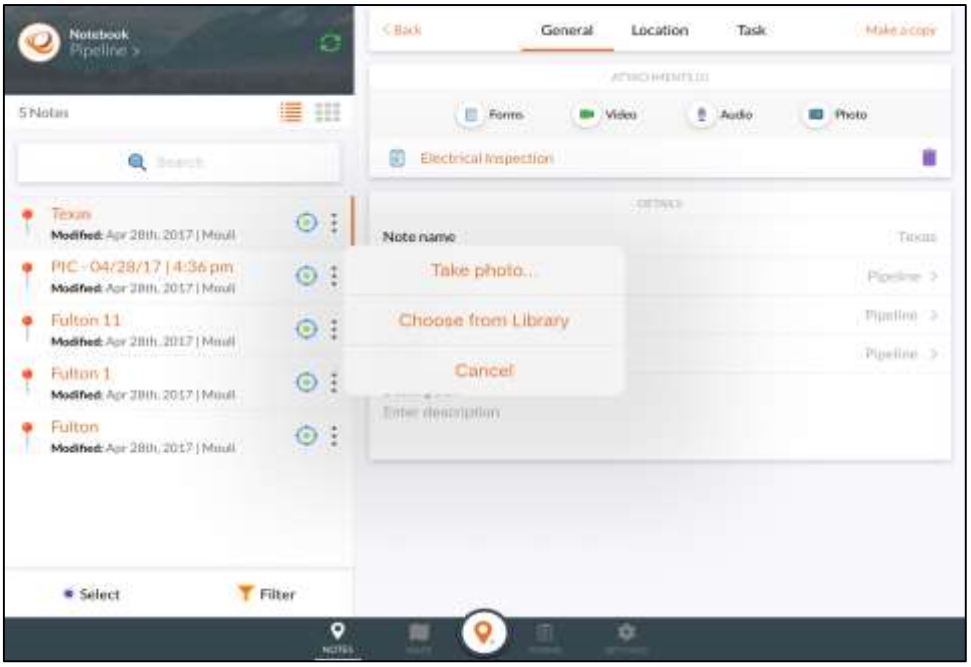


Figure 217: Photo

3. Once you take a photo, press **Use photo**. If you choose from library, select the photo. The Photo is now attached to the note. Click on the photo name to view the photo. A preview of the photo is displayed. You can attach multiple photos to a note. To attach another photo, press the Photo icon.

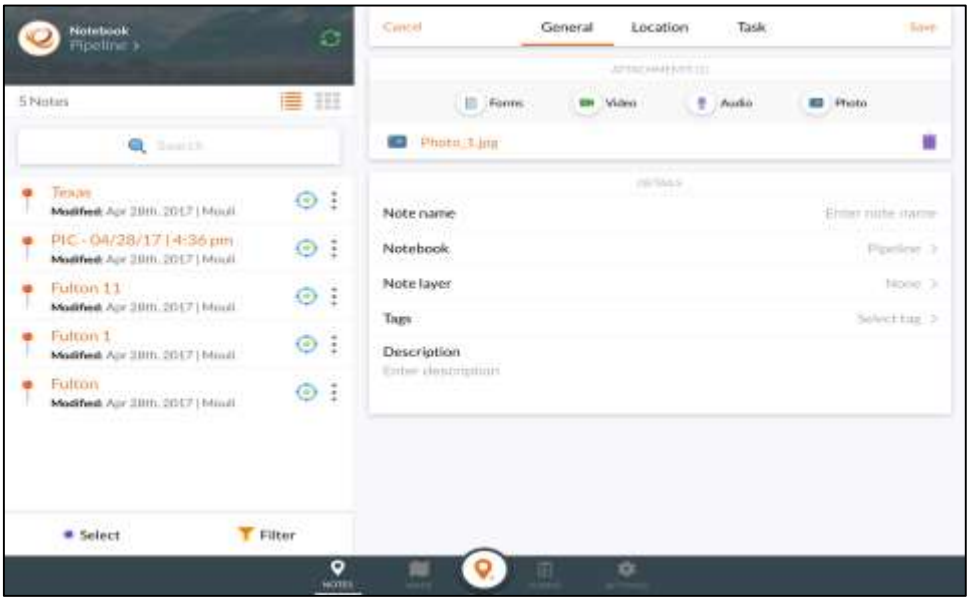


Figure 218: Photo attached in the note

- To view the details and the location coordinates of the photo, press the Details button.

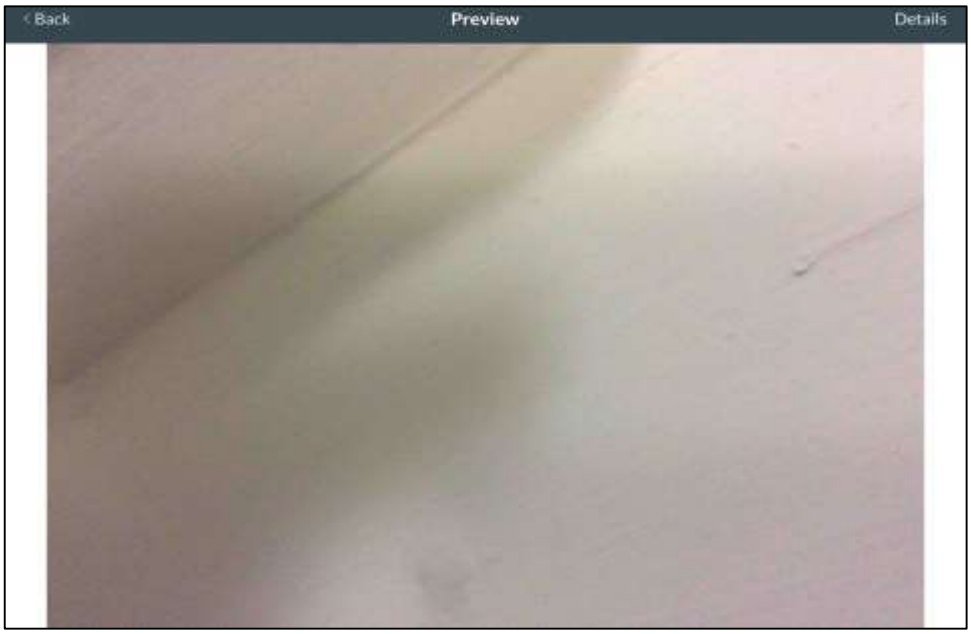


Figure 219: Photo preview

- The **General** tab displays information such as orientation, image length and width, and model and make of the camera used. The **GPS** tab displays the location coordinates of the place the photo was taken. Press the Back button to return to the note.

Figure 220: Photo – General & GPS Details

5.7. Creating a Point Note

1. Press the Quick Launch Icon at the bottom center of the screen and select the **Point** icon. The Map view opens displaying a pin marker at your current location.
2. If you want to mark your current location, on the **Capture** tab, press the **Capture** button. Press **Done**. You will be redirected to the note creation screen.

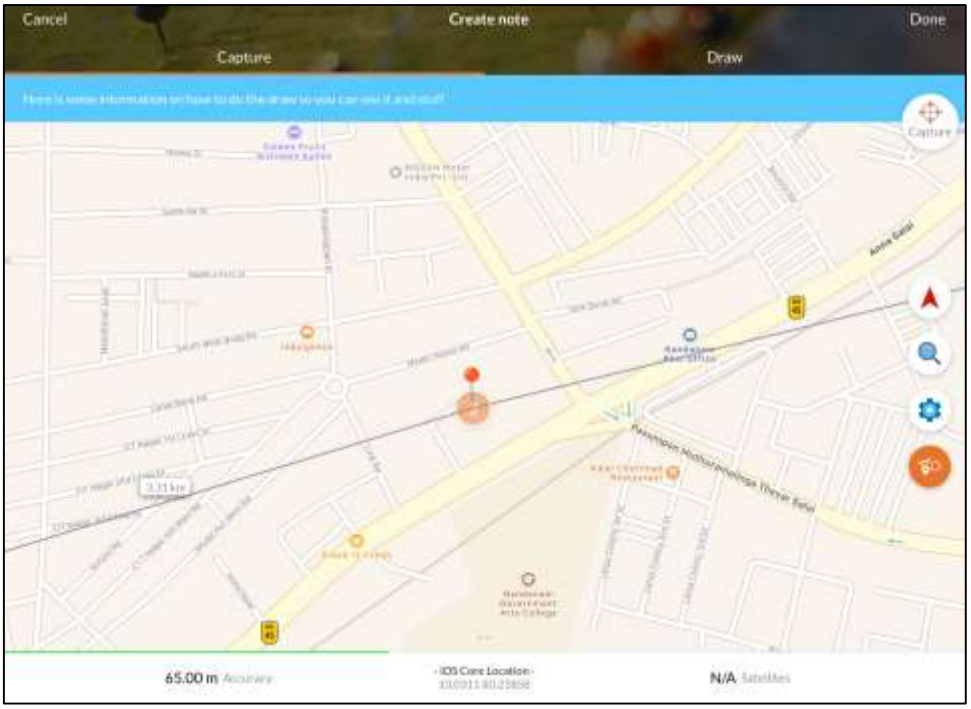


Figure 221: Point - Capture

3. Or, if you want to tap somewhere else on the map, on the **Draw** tab, press the **Tap** icon. The Target and Drop options are displayed. With the Target icon selected, the location coordinates of your location are displayed. You can press the Drop icon anywhere you want and a pin marker will be dropped at that point. Press **Done**. You will be redirected to the note creation screen.

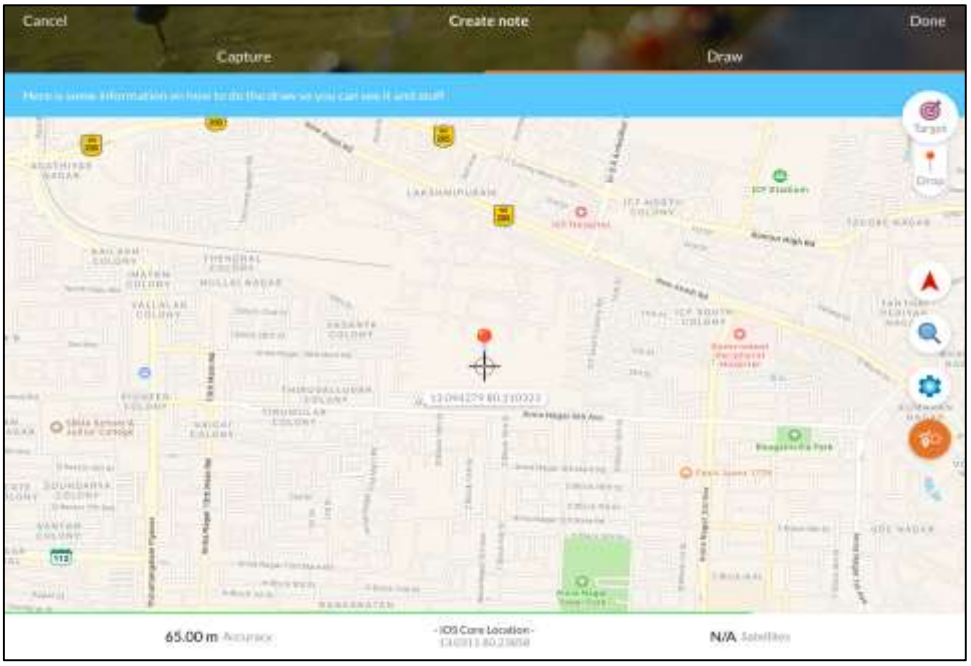


Figure 222: Point - Drop

4. If you do not want the location coordinates displayed, press the Target icon, which will enable the Tap icon and disable the Target icon. You can tap anywhere on the map and a pin marker will be dropped at that point. Press **Done**. You will be redirected to the note creation screen.

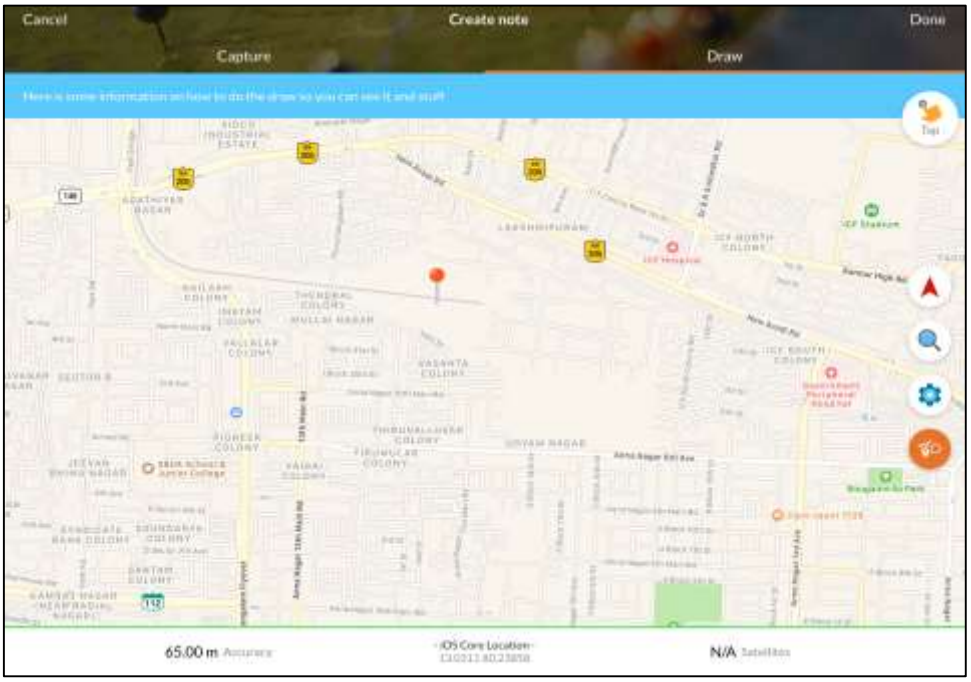


Figure 223: Point - Tap

5. The Location tab displays the coordinates for the point that you selected. Enter the note name and add required resources and press Save. Your note is now created.

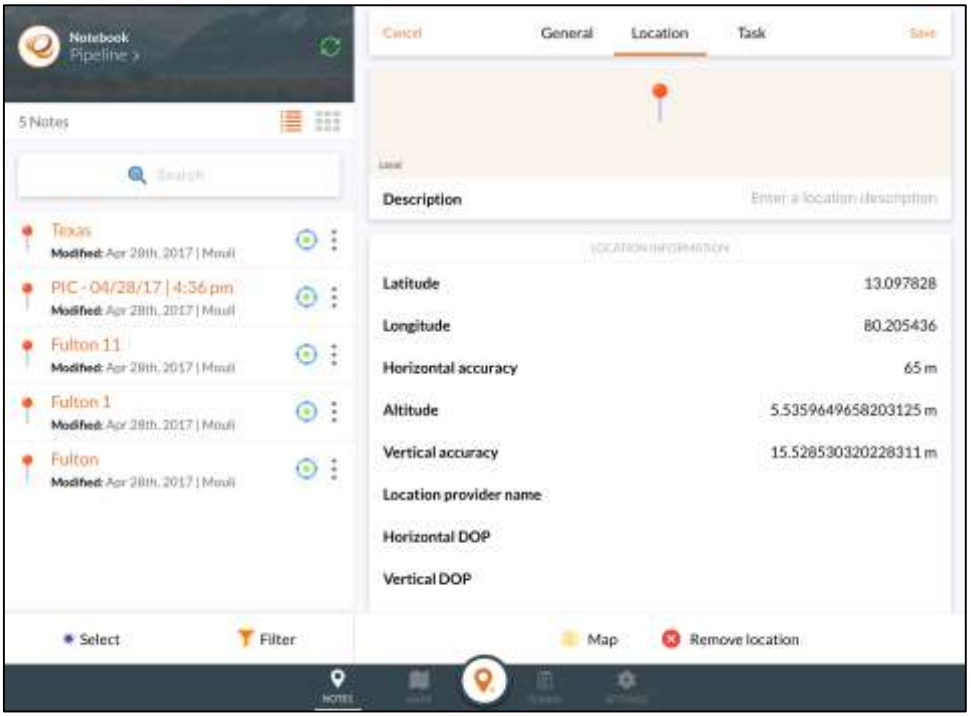


Figure 224: Location coordinates

Note: A warning message is displayed if the accuracy is between the specified warning threshold and the restriction threshold, and you will be restricted from capturing the location if the accuracy exceeds the restriction threshold specified in the Location Services Settings.

For example, if the warning threshold is set at 5 meters and the restriction threshold is set at 10 meters, a warning message is displayed if the accuracy is anywhere between 5 and 10 meters and a restriction message is displayed if the accuracy exceeds 10 meters.

5.8. Creating a Polyline or Polygon Note

Before you start recording, toggle on the buttons in the Visibility Options under Measurements in the **Settings** menu to measure the distance of the lines or the area of the polygons that you draw.

1. Press the Quick Launch Icon at the bottom center of the screen. If you want to create a polyline, select the **Line** icon or if you want to create a polygon, select the **Polygon** icon. The Map view opens displaying a pin marker at your current location.
2. On the Record tab, press the **Start** button to create lines and polygons tracking your moves. Once you start recording, vertices are created after you cover the distance specified in the Location Settings, based on the refresh rate interval. The distance between each vertex is displayed in the unit that you specified in the settings. If you leave the Record screen, the recording is paused. You can pause and resume your recordings by pressing the Pause button.

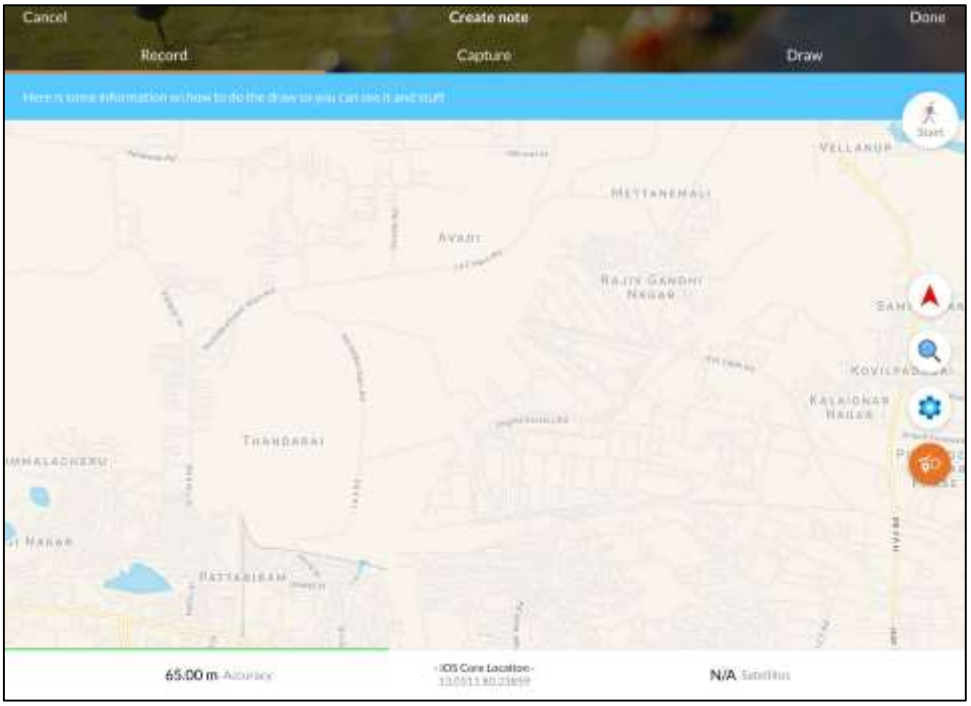


Figure 225: Start recording

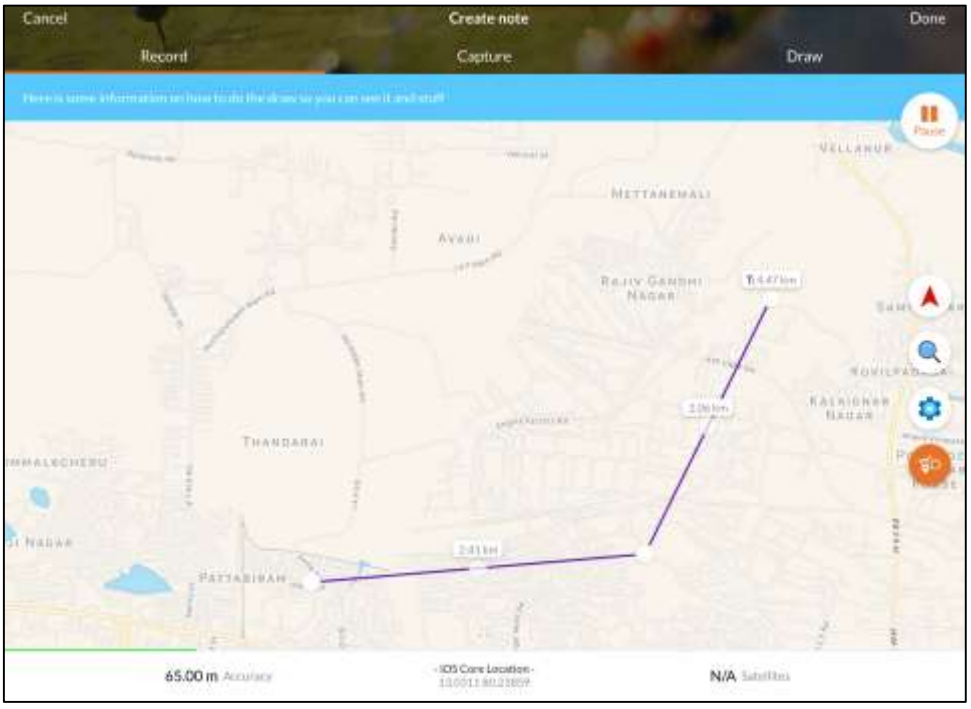


Figure 226: Pause recording

3. To capture your current location during recording, on the **Capture** tab, press the **Capture** button. A vertex is created at your current location. You can then resume your recording on the **Record** tab.

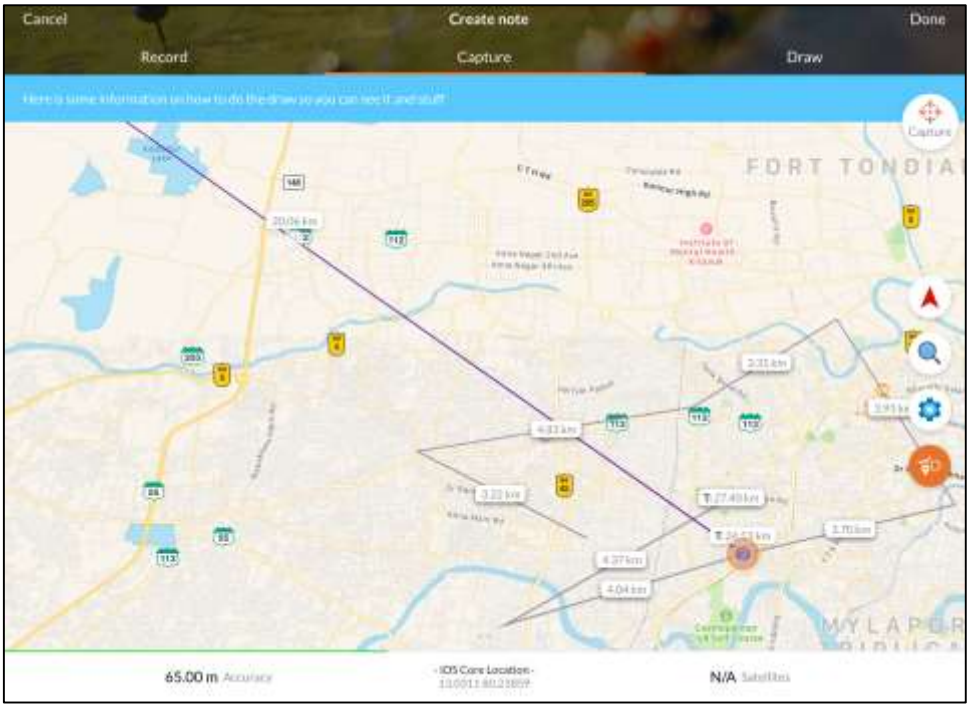


Figure 227: Capture

4. You can also draw a line or polygon using the **Tap** icon on the **Draw** tab by tapping on the map where you want. If the Target icon is on, the location coordinates of the vertices are displayed on the map. You can then resume your recording on the **Record** tab.

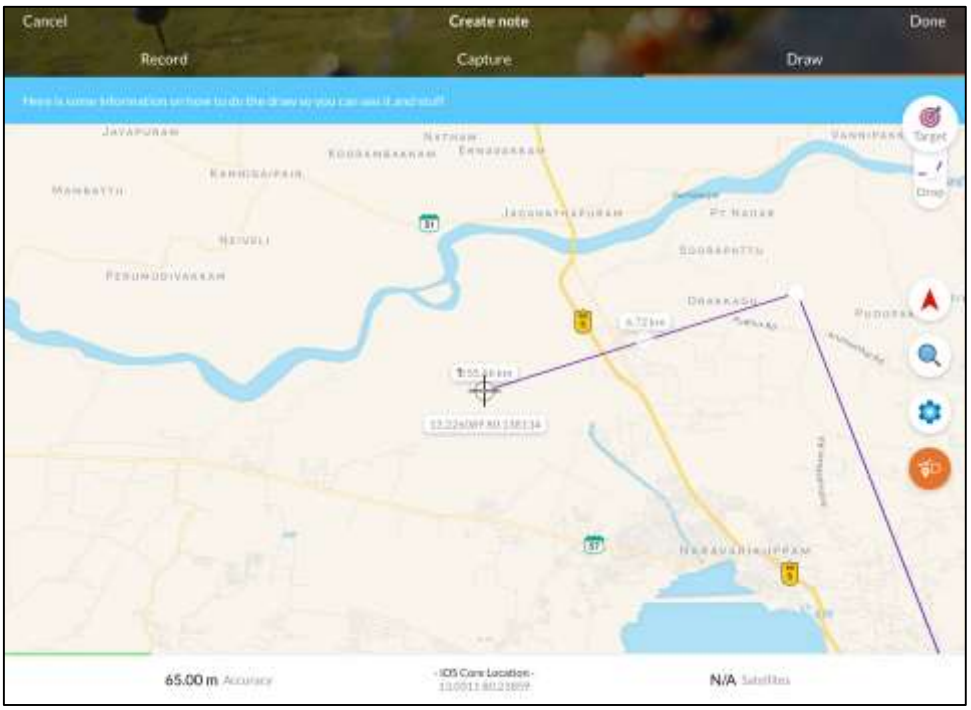


Figure 228: Drop

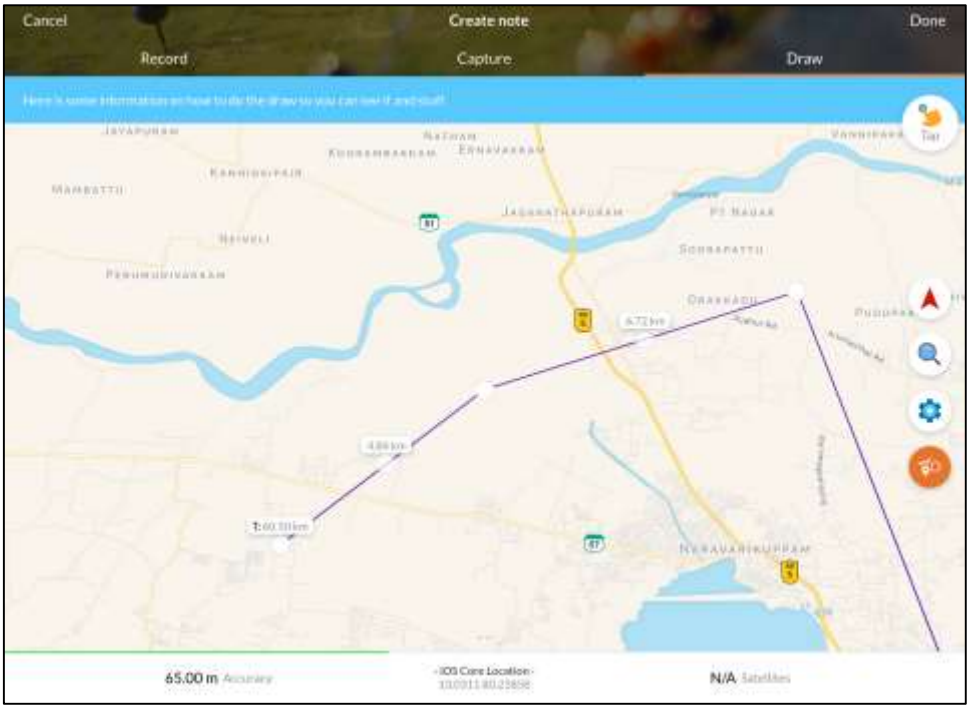


Figure 229: Tap

5. Once you finish recording, press **Done** and you will be taken to the map screen. If it is a line that you have drawn, the total length is displayed. If it is a polygon, the area and the perimeter of the polygon is shown. Press Back to go to the Note creation screen.
6. The coordinates for the vertices created during your recording are displayed on the Location tab.
7. Enter the note name and add required resources and press Save.

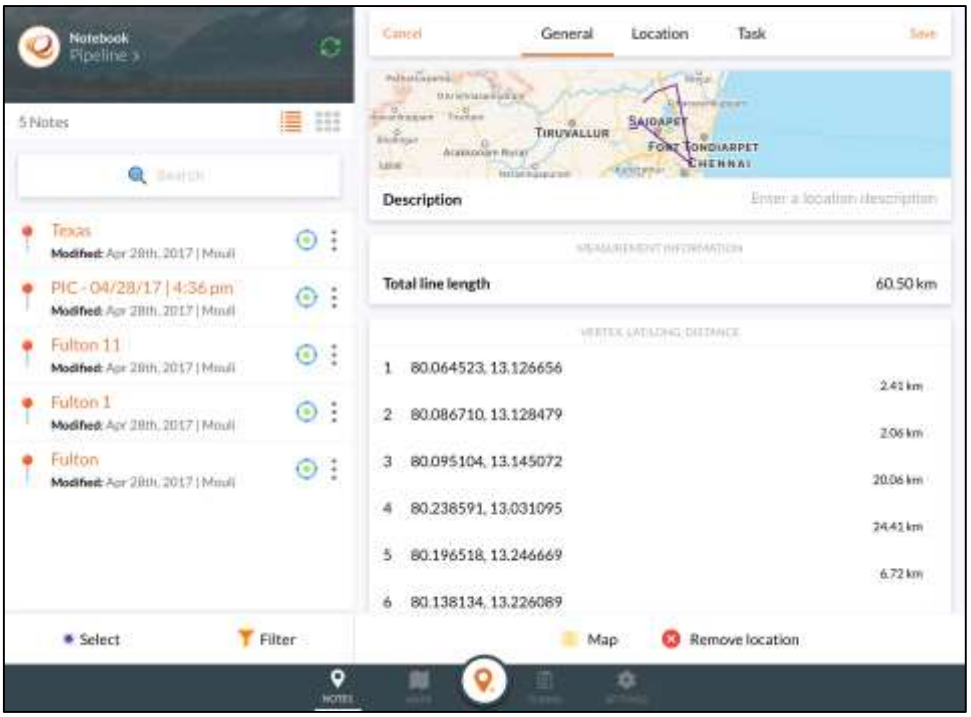


Figure 230: Location coordinates

6. Notebooks

6.1. View Notebooks

1. Press the **Notebook** section on the top section of the screen. The **Notebooks** list view opens displaying the list of notebooks available in the server with the Download icon, along with the notebook name, count of notes inside, created by and modified timestamp details. The device syncs automatically with the server every minute.
2. To download a notebook, press the download icon. The progress bar will show the download status of each resource in the notebook in the order of form templates, maps, map overlays, and notes along with the number of resources that are downloaded. Press the cancel icon to stop downloading. All the notes that were downloaded until you cancelled the downloading will be discarded.

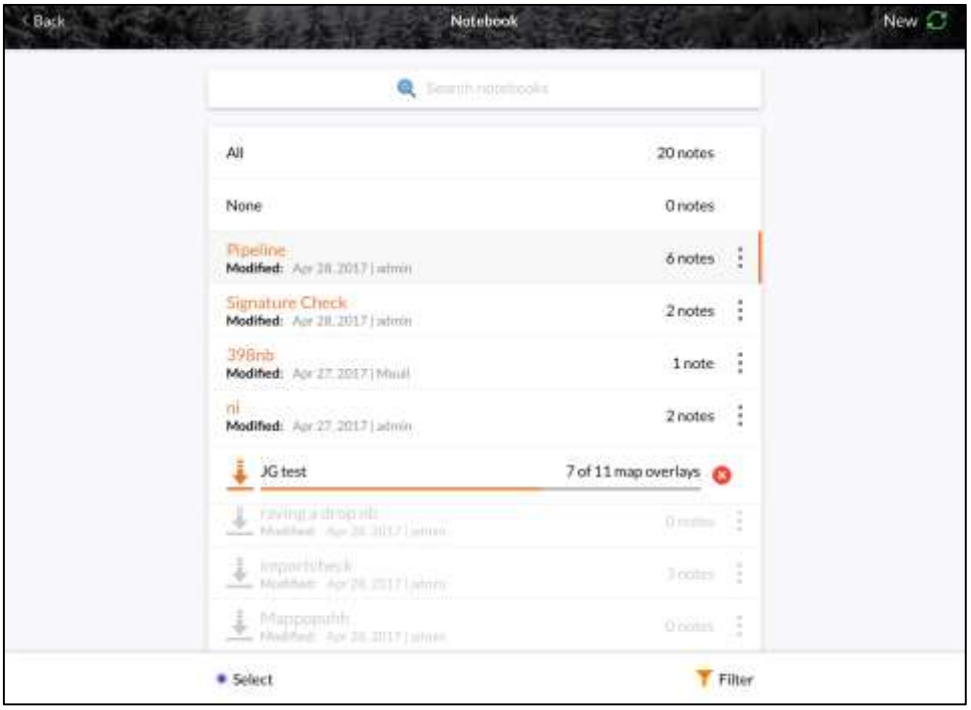


Figure 231: View notebooks

3. To create a new notebook, press the **New** button at the top right corner of the screen. You will be directed to the **Create Notebook** screen.
4. You can view only the notebooks that you have been granted access to. If the access had been denied after you downloaded a notebook, a red access restriction icon is displayed near the notebook indicating that you have been denied access to that notebook. Any changes that you make in the notebook will not be synced with the server after the access has been denied.
5. When you press on a notebook name, the notebook is selected and the notes, forms, and maps of the selected notebook are listed.

6. In the **Search notebooks** field, you can search by entering the name of the notebook that you want to view.

8. To share or delete a notebook, press the settings icon on the right side of the corresponding notebook. In the Tab view, press the icons:

   - **Send**: Press this icon to share the notebook with other users through mail and export the notebook with the notes into a geopackage file. The file is exported as a zip file in your local drive.
   - **Remove**: Press this icon to delete the selected notebook. Press **Ok** in the confirmation dialog box.

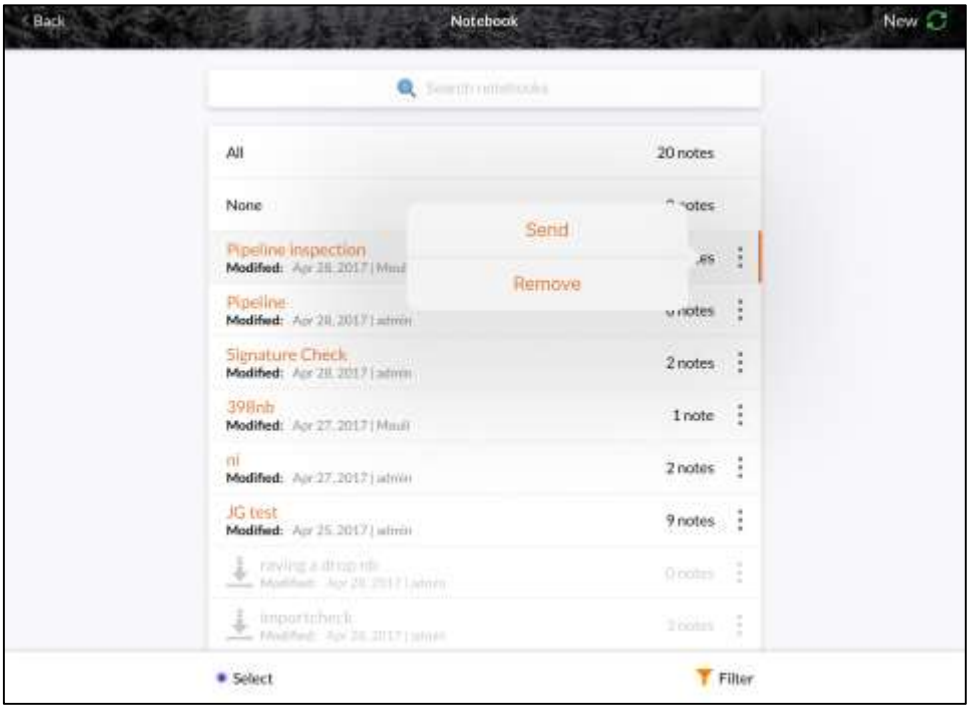


Figure 232: Notebook Share/Delete

7. To delete multiple notebooks, press the **Select** option, select the required notebooks, and then press the delete icon.

8. The **Filter** icon allows you to filter and sort the notebooks. In the **Sort** dropdown, you can select the parameters from the following options, based on which the notebooks will be displayed:

   - Notebook name
   - Modified date
   - Created by
   - # of notes

9. You can use the Filter options to filter the records based on:

   - Modified date
   - Created by

6.2. Creating a Notebook

1. Press the **Notebook** section on the top section of the screen. You can view all the notebooks that were recently updated or created.
2. To create a new notebook, press the **New** icon at the top right corner of the screen. The Notebook creation screen opens.
3. On the **General** tab, enter the **Name** and **Description** for the notebook to be created.

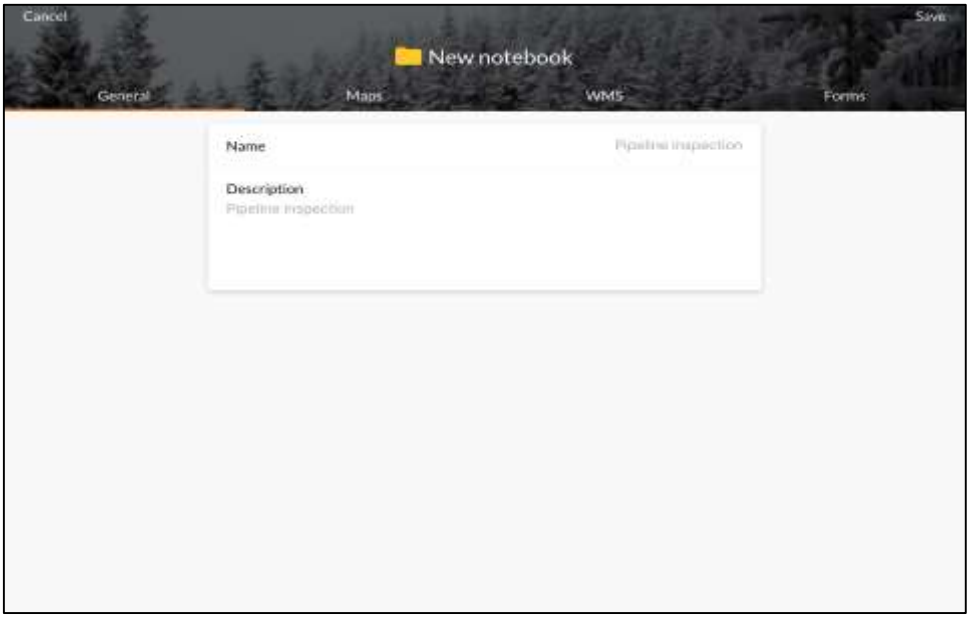


Figure 233: Create Notebook - General

4. On the **Maps** tab, you can view the list of available maps. Toggle on the maps that you want to attach to the notebook. You can attach multiple maps to the notebook.

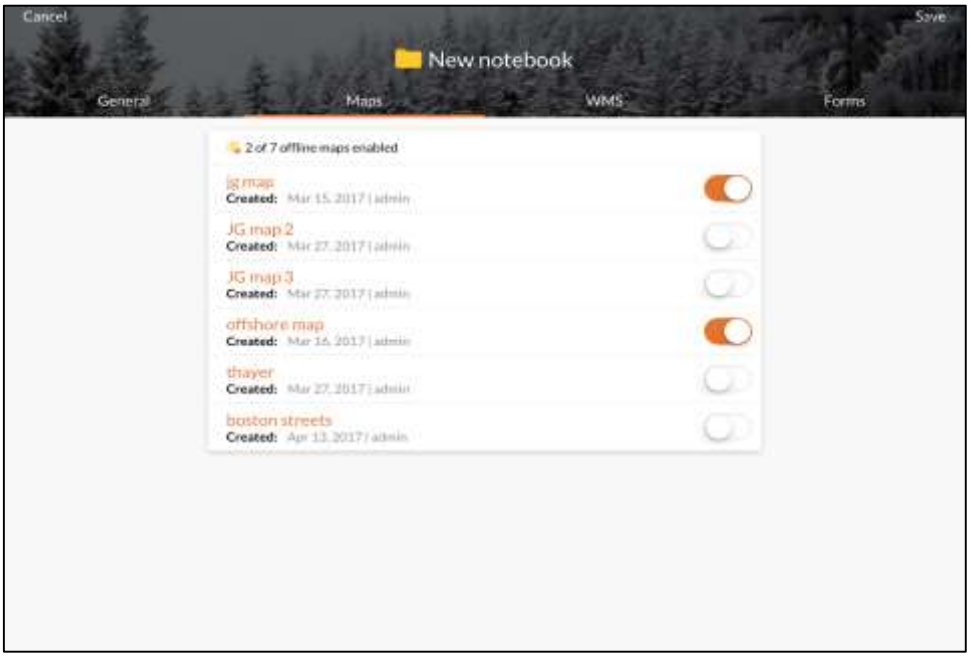


Figure 234: Create Notebook - Maps

5. On the **WMS** tab, from the list of existing map overlays, toggle on the map overlays that you want to attach to the notebook. You can attach multiple map overlays to the notebook.

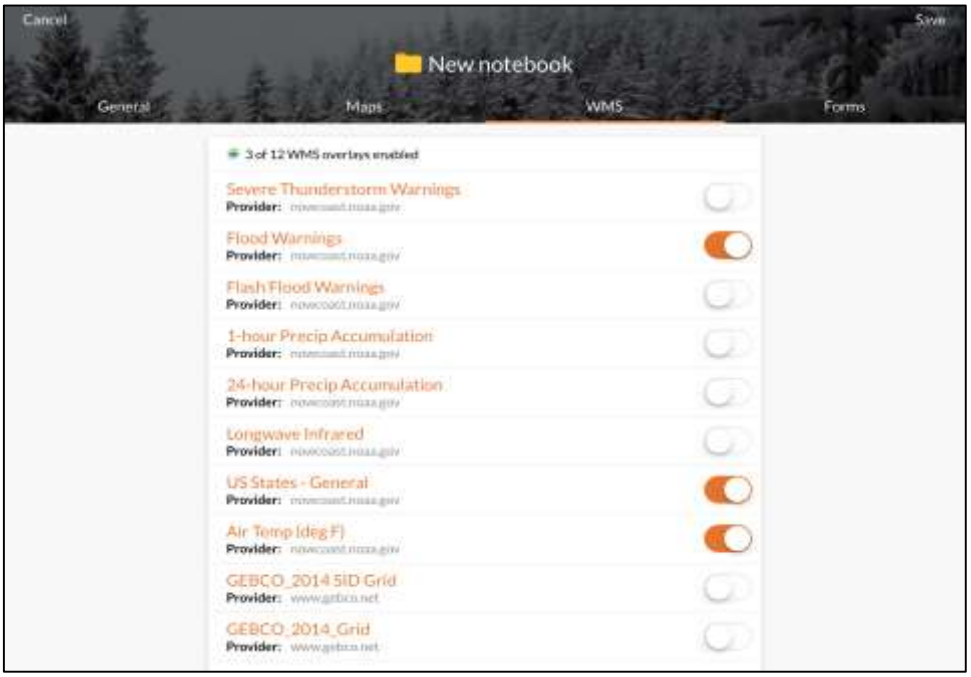


Figure 235: Create Notebook - WMS

6. On the **Forms** tab, toggle on the forms that you want to attach to the notebook. You can attach multiple forms to the notebook.

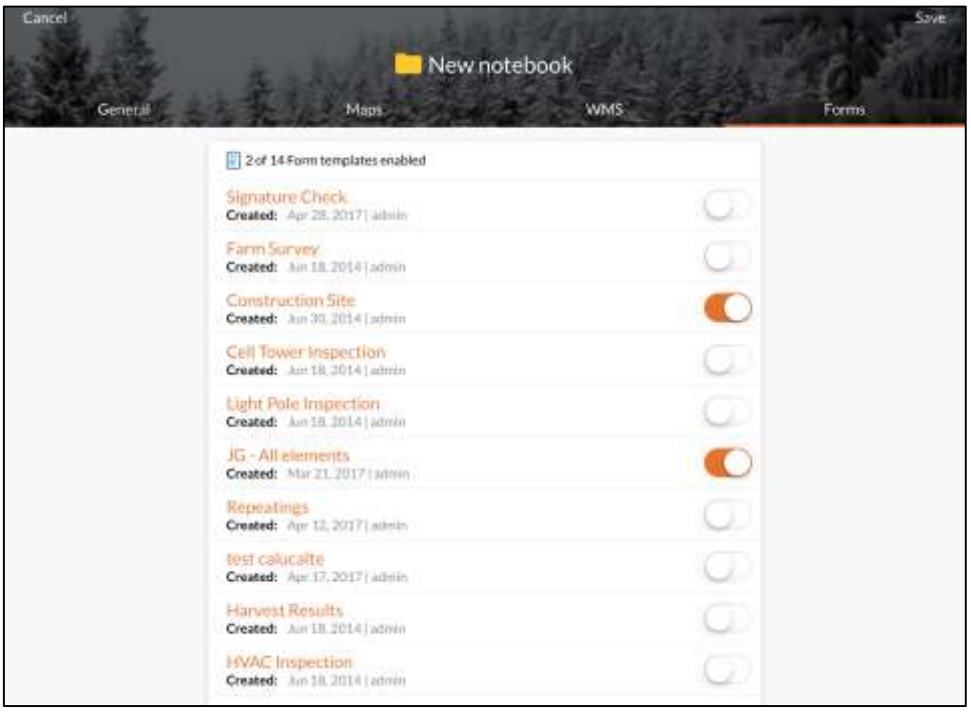


Figure 236: Create Notebook - Forms

7. Press the **Save** button on the top right corner to save the notebook with the attached forms, maps, and map overlays.

7. Settings – Location & Measurement

Press the Settings icon on the lower right of the screen to view the following options that display your server connection settings and allow you to modify location settings and import map files.

1. **Server:** The Status of your connection with the server is displayed along with the server to which you are connected. The date and time of the last sync is also displayed here.
2. **Storage:** The total storage available in your device is displayed here.
3. **Logout:** Press this option to log out of the app.

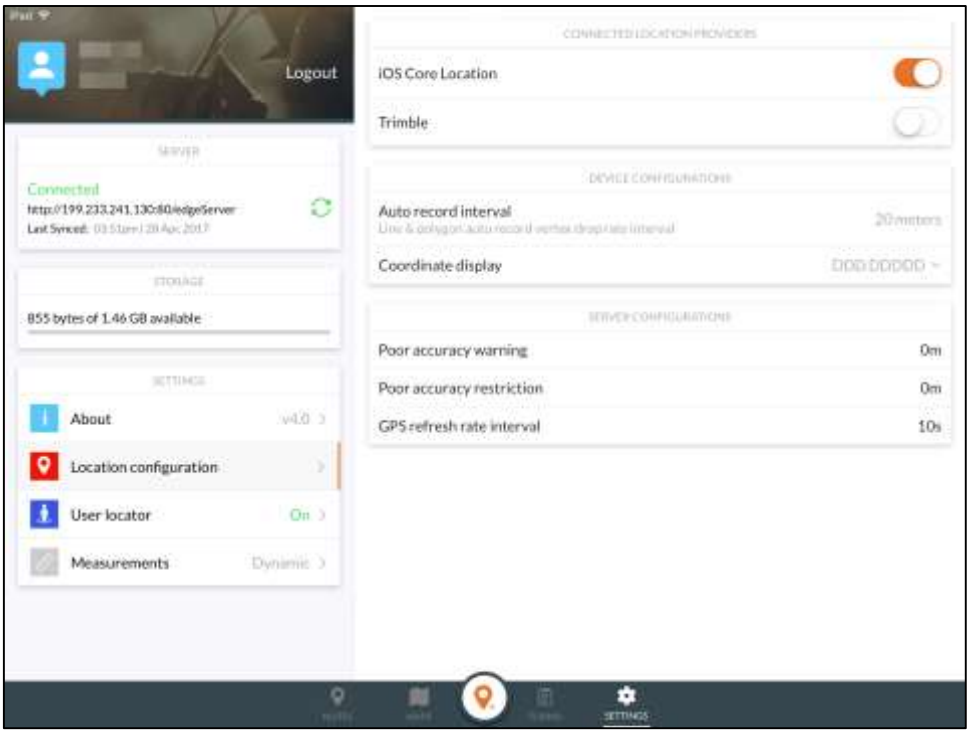


Figure 237: Settings

7.1. Modify Location Settings

1. **About:** Press here to see the version number of TerraGo Edge installed in your device and related documents such as the Terms of Use, End User License Agreement, Support, and Feedback request.

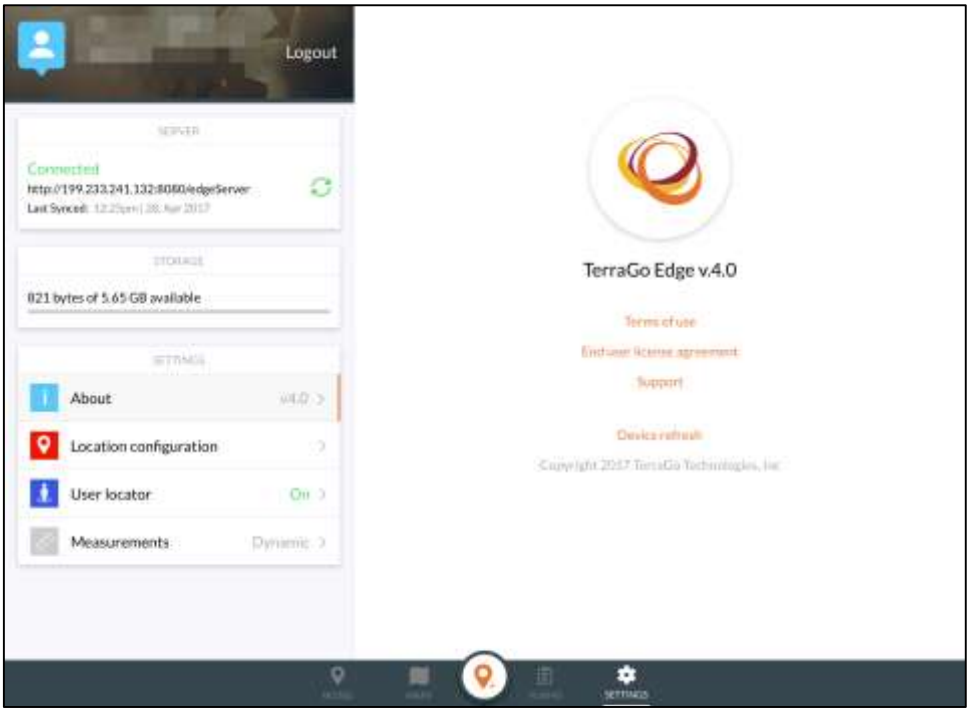


Figure 238: About

2. **Location Configuration:** You can specify location and measurement settings here.

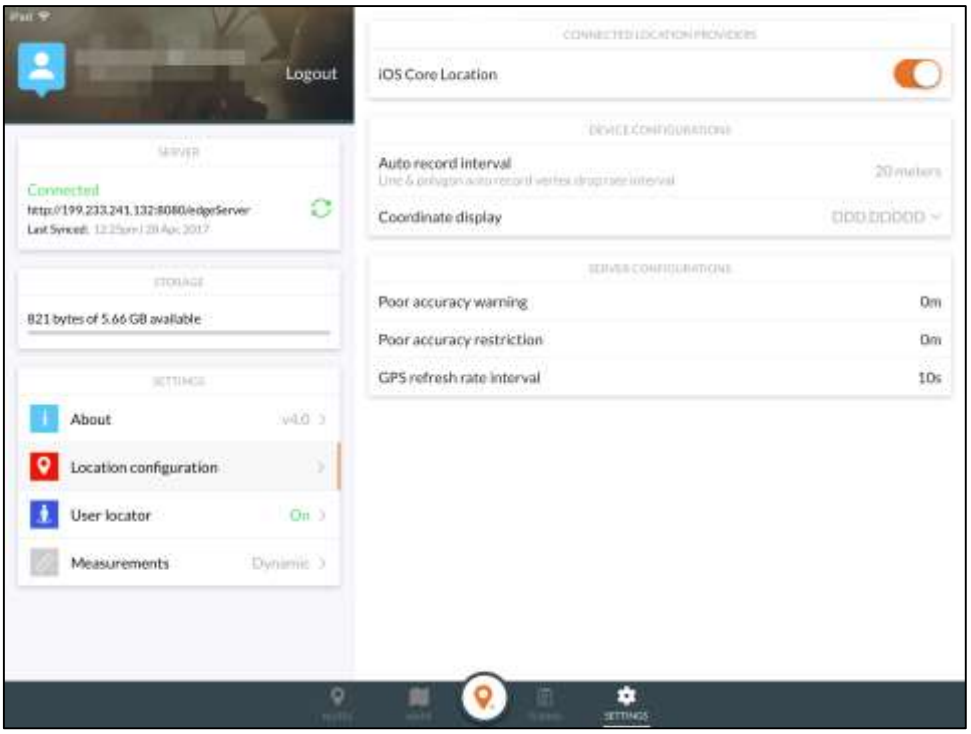


Figure 239: Location Configuration

3. **CONNECTED LOCATION PROVIDERS:** The iOS/Android location services and any third party external GPS devices (such as Bad Elf, SXBlue, Trimble, etc.) that you have paired using Bluetooth services are displayed here. Toggle on the location service providers to determine your location. Based on the

accuracy of the data provided, Edge will either use the standard location service or the third party GPS device data.

You can connect external GPS devices to your iPad or iPhone via Bluetooth and this overrides the GPS on the device to capture high accuracy location data. Some of the third party external GPS devices that Edge supports are:

- Bad Elf
- CHC
- EOS
- SXBlue
- Trimble

Figure 240: Location Providers

4. **LASER RANGEFINDERS:** Any laser rangefinders (such as LTI True Pulse 360B, etc.) that you have paired using Bluetooth services are displayed here. If this **Enable laser rangefinders (LRFs)** button is toggled on, Edge will use the paired device to capture the location data.

   Note: Since the LTI True Pulse 360B Laser rangefinder is a non-iOS GNSS receiver, the NMEA-BT adapter from Aman Enterprises (which connects to the iOS devices wirelessly using the native Bluetooth built into the iOS devices) will enable you to connect the Laser rangefinder with a serial port to the iOS devices.

Figure 241: Laser rangefinders

5. **DEVICE CONFIGURATIONS:**

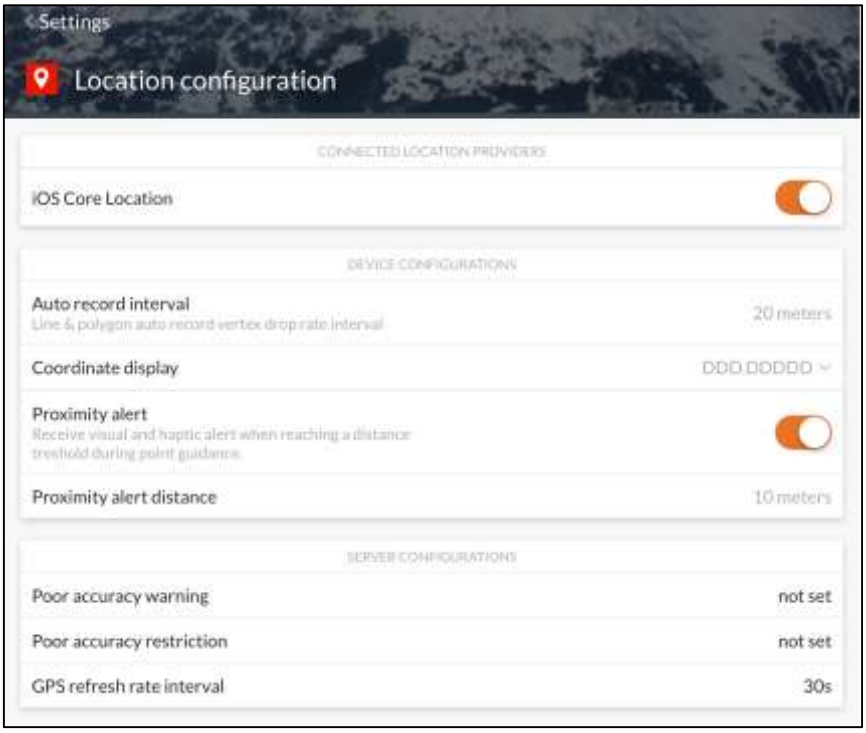


Figure 242: Location configuration

- **Auto record interval:** You can specify the distance between two points after which a vertex will be created depending on the refresh rate interval specified, while autorecording.
- **Coordinate display:** You can specify the format in which the coordinates should be displayed:
    - **DDD.DDDDD** (Decimal degrees)
    - **DDD MM SS.S** (degrees, minutes, decimal seconds)
- **Proximity alert:** If this button is toggled on, a proximity alert message with sound and vibration is displayed when the user's current distance from the selected note's location point is less than or equal to the defined proximity distance, which is the close proximity area.
- **Proximity alert distance:** You can specify the close proximity alert distance here. This is the distance at which an alert saying "You're almost there" is displayed to the user for 3 seconds when the user's current distance is less than or equal to the defined proximity distance from the selected note's location point. When the user is in the close proximity area, the line, distance, and direction are displayed in green color, after which it changes to blue when the user leaves the close proximity area. By default, the alert distance is set to 5 meters.

6. **SERVER CONFIGURATIONS:** These fields display the settings specified in the server.
    - **Poor accuracy warning:** The warning threshold, which when exceeded but less than the restriction threshold, will display a warning to the user. For example, if the warning threshold is set at 5 meters

and the restriction threshold is set at 10 meters, a warning message is displayed if the location accuracy is anywhere between 5 and 10 meters.

- **Poor accuracy restriction:** The restriction threshold, which when exceeded, will restrict the user from capturing the location. For example, if the restriction threshold is set at 10 meters, a restriction message is displayed if the location accuracy exceeds 10 meters.
- **GPS refresh rate interval:** The Refresh rate interval field displays the rate interval settings specified in the server at which the location data is provided to the Edge app.

Figure 243: Server configurations

7. **User Locator:** This option will allow you to show or hide your location on the map view. If the **Share my location** button is selected on, your location is shared with all users and your device is synced with the server every two minutes. If **Off**, your location is not shared with the server and your status is displayed as **Deactivated** in the map view. If for any reason, your device does not sync with the server for more than 5 minutes, you will appear **Offline**. If you do not enable this option to show your location, your device status will be displayed as **Deactivated**.

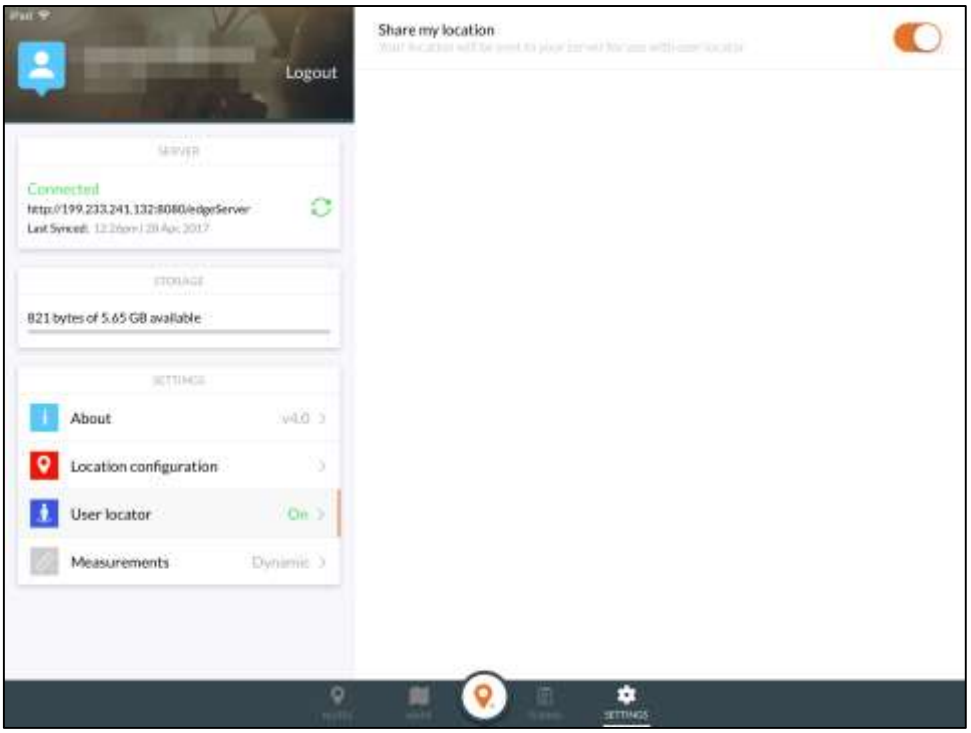


Figure 244: User Locator Settings

7.2. Modify Measurement Settings

1. You can specify the measurement settings here. You can select the Measurement type as **Static** or **Dynamic**.

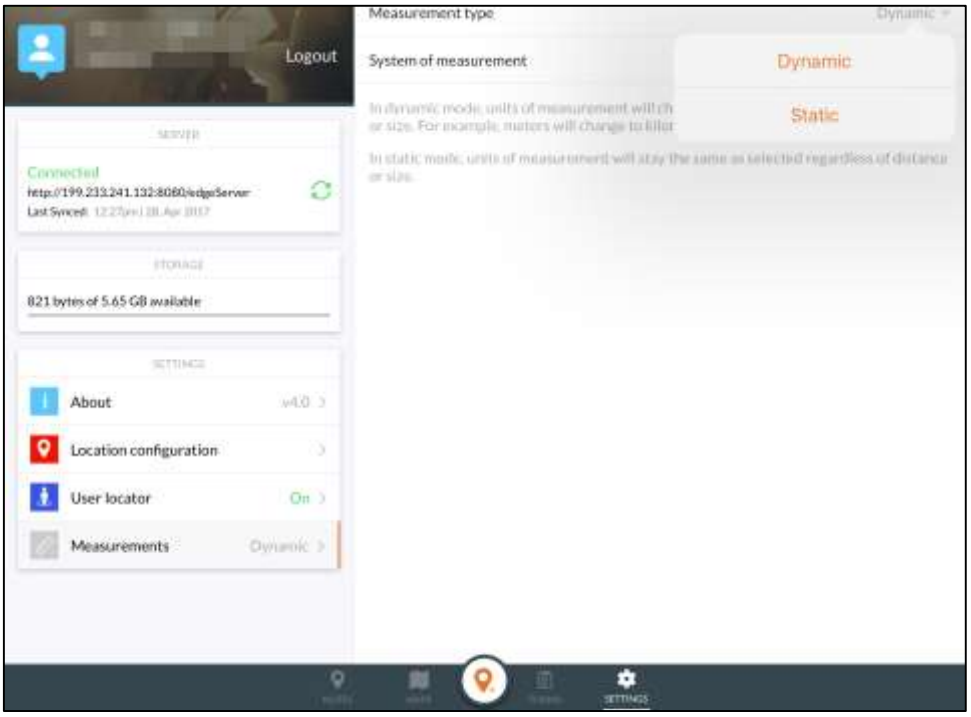


Figure 245: Measurement settings

2. **Dynamic:** When you select **Dynamic** mode, the measurement unit will change dynamically based on the region that you are in. You can still change the system of measurement to Metric or Imperial. The settings you make will take into effect, irrespective of the region based settings. Also, when you are measuring larger distances, the measurement unit will change after a particular distance.

   For example, if you have selected imperial system, distances less than 1320 feet will be displayed in feet after which in miles, areas less than 6969600 square feet will be displayed in feet after which in square miles, and time will be displayed in minutes. Similarly, if you have selected metric system, distances less than 250 meters will be displayed in meters after which it will change to kilometers, areas less than 250000 square meters will be displayed in square meters after which in square kilometers, and time will be displayed in minutes.

- **System of measurement:** Select the system of measurement from the following options:
  - **Metric**
  - **Imperial**

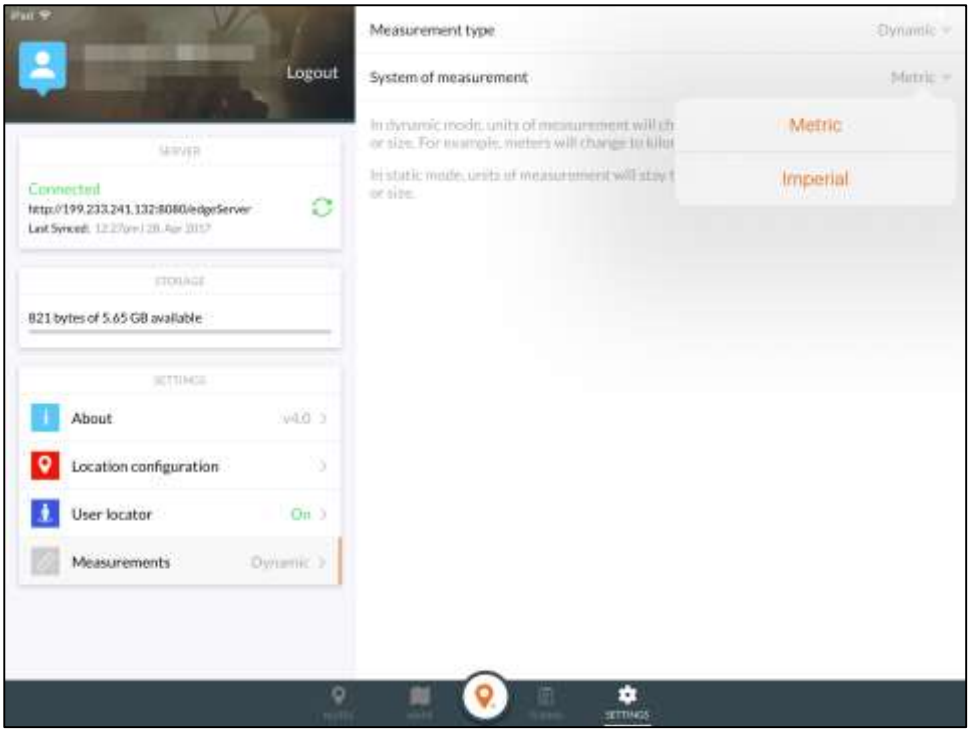


Figure 246: Dynamic - System of measurement

3. **Static:** When you select **Static** mode, the measurement unit will remain the same as you specify in the distance units or area units, irrespective of the region that you are in. If you select Static, you can specify the distance units and area units as follows.

   - **Distance units:** You can select the unit of the distance here.
     - **Meters (m)**
     - **Kilometers (km)**
     - **Feet (ft)**
     - **Miles (mi)**
     - **Time (s)**

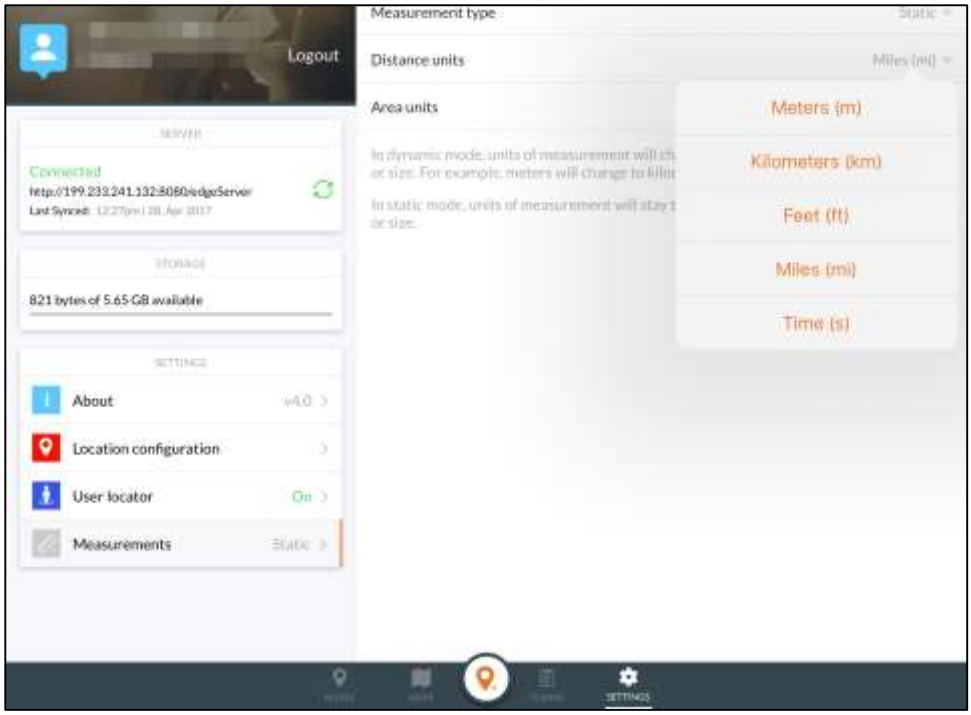


Figure 247: Static mode - Distance units

Note: If you select the distance unit as Time and then create a polyline or polygon, the time taken to travel between two vertices is calculated by dividing the distance travelled by the user (meters) by average walking speed (5.0 kilometers per hour or about 3.1 miles per hour)

- **Area units:** You can select the unit of the area here.
    - **Square meters (m2)**
    - **Hectares (ha)**
    - **Square kilometers (km2)**
    - **Square feet (ft2)**
    - **Acres (ac)**
    - **Square miles (mi2)**

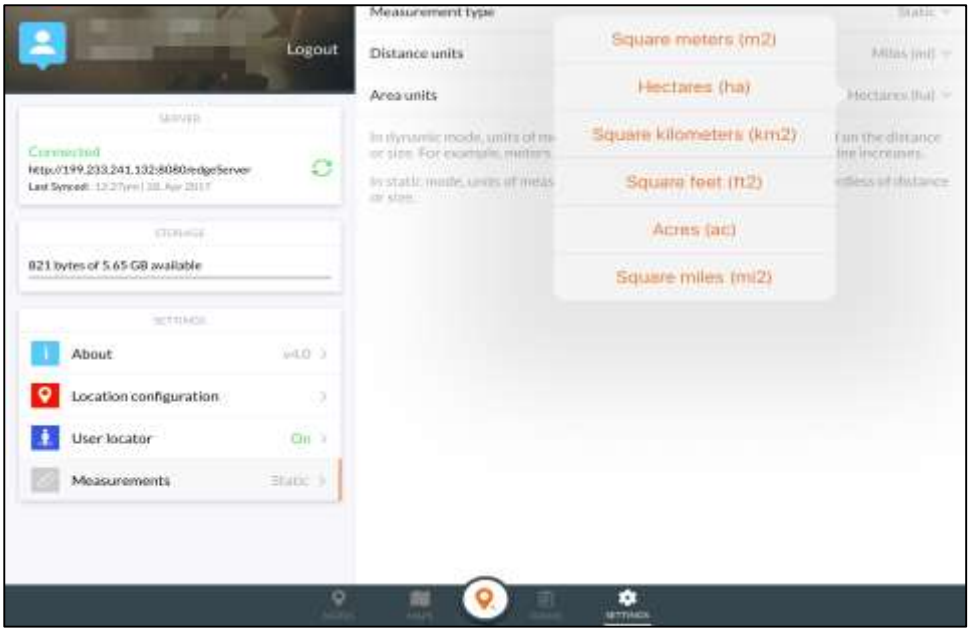


Figure 248: Static mode - Area units

8. Importing GeoPDF / Geopackage / Raster Files

You can import geoPDF files with single or multiple geopackages and also raster. When you import a file, the notes will be created in the notebook that you specify.

When you select a geoPDF file with multiple geopackages, select the geopackage file for which you want to create the notes and then click Continue.

1. To import an offline GeoPDF, a Geopackage or a Raster file, open the file using TerraGo Edge.

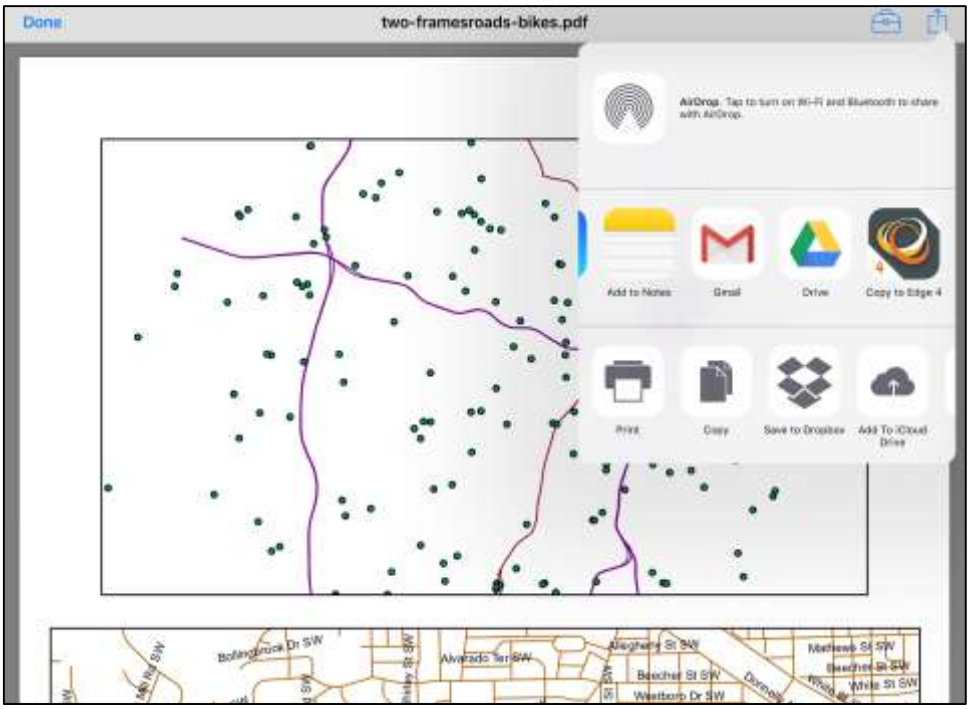


Figure 249: Opening Geopackage file

2. In the Notebook field, select the notebook into which you want to import the PDF or the geopackage file or create a new notebook by selecting the New button.
3. If you want to import only the map or the raster or the features and feature classes, toggle on the **Import Map**, **Import Raster**, or **Import features & feature classes** buttons.

Figure 250: Import Map / Features

4. If you are importing a file with only notes or maps, only the respective data is shown and you will not be able to toggle on the **Import Map**, **Import Raster**, or **Import features & feature classes** buttons.
5. Under the **Notes** section in the **GeoPackage Names** field, if the file has multiple geopackages, you can select the geopackage that you want to import. Based on the geopackage that you select, the corresponding feature classes and number of notes are displayed.

Figure 251: Select Geopackage

6. In the **Feature classes** field, select the feature classes that should be imported.

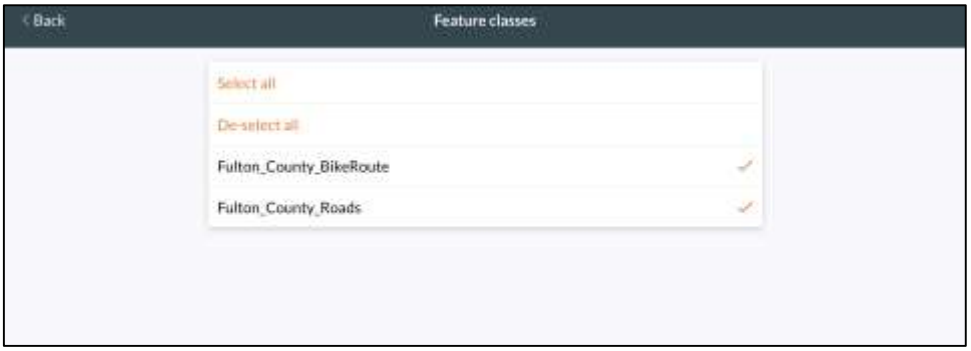


Figure 252: Feature Classes

7. You can specify the note name using the following options:

   - **Attribute:** Based on the feature classes selected, the corresponding attributes are displayed. The note layer will be based on the feature class and the note name will be based on the attribute.
   - **Feature ID:** If you choose this option, the notes are named based on the fields in the geopackage.
   - **Feature class name:** If you select this option, the note layer will be based on the feature class. The number of notes and the form templates that will be created is displayed.
   - **Custom Name**: You can enter a custom name for the notes. The notes are named with a number added to the custom name that you enter.

Figure 253: Note name

8. Press the Import button on the top right corner of the screen.

Figure 254: Import

9. The progress of the map import process is displayed as shown below:

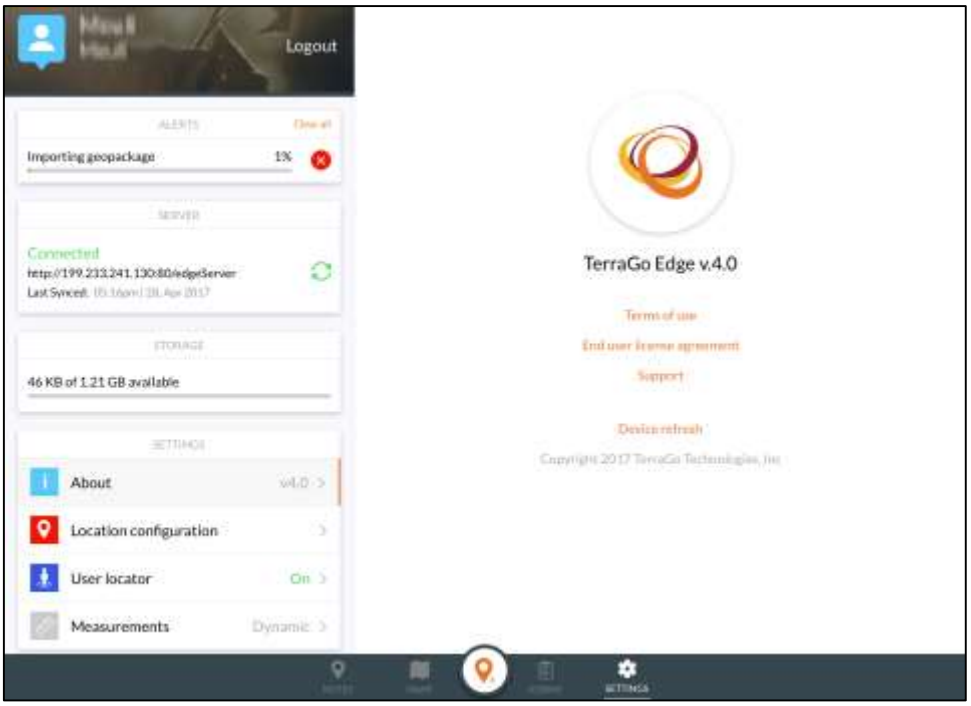


Figure 255: Map import progress

10. Once the map import process is complete, a notification is displayed. A notebook with the converted map will be created and downloaded. You can view the map in the Maps section.
11. If you are importing a Geopackage file, the progress of the notes import process is displayed in the notebooks list view.

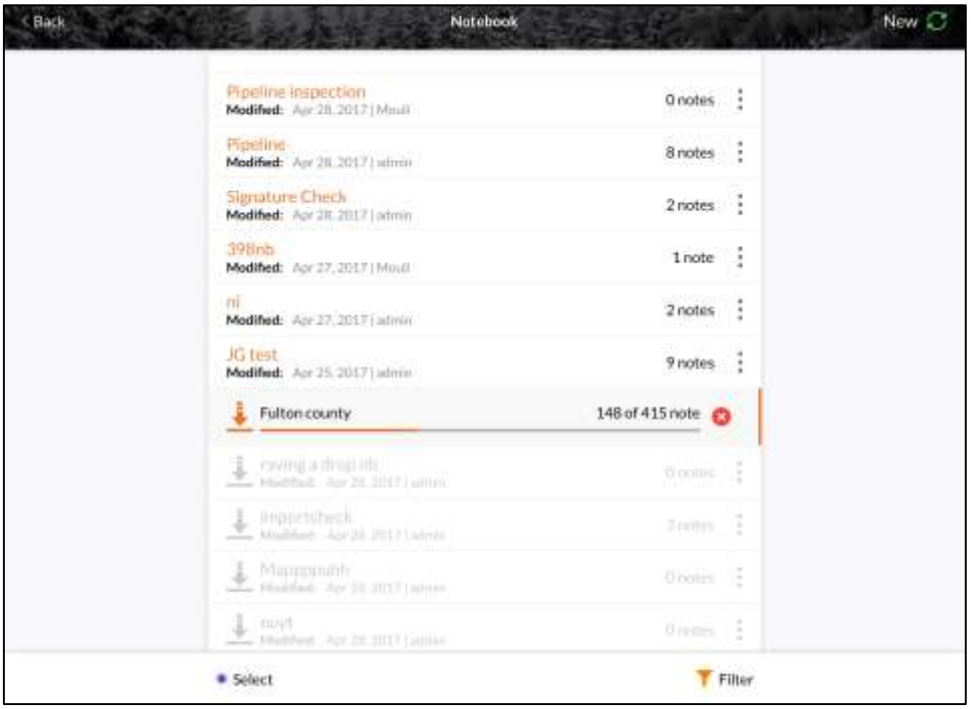


Figure 256: Note import progress

12. Once the process is complete, a notebook is created with the notes as shown below:

    Note: You can import only one file at a time. You can import the next file only after the current import process is complete.

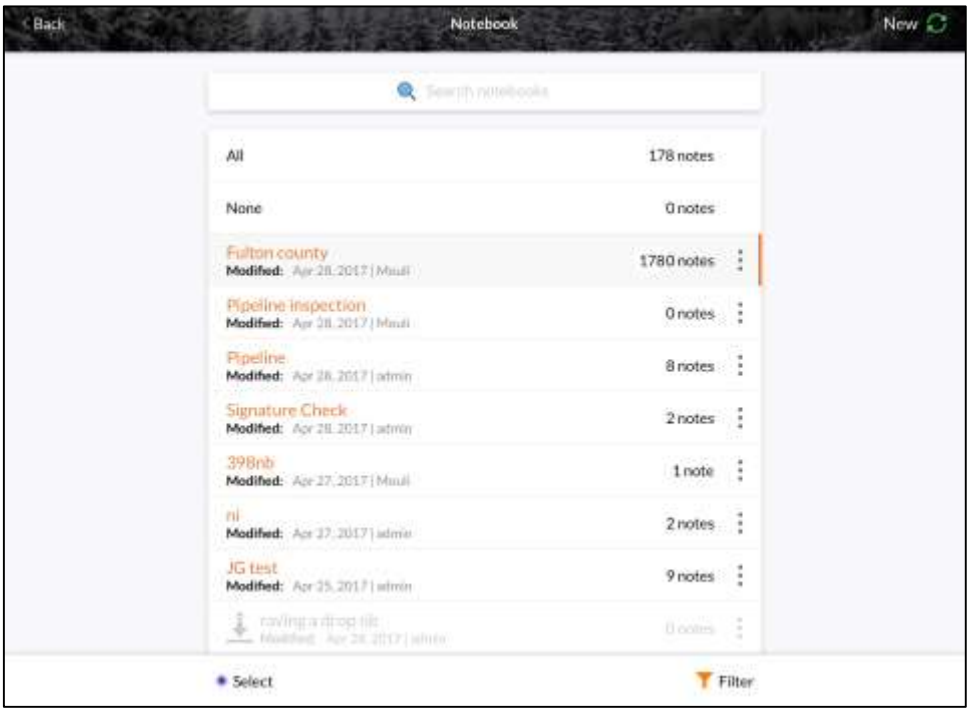


Figure 257: Notebook created