



ArcGIS Pro Tasks: An Introduction

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SEE
WHAT
OTHERS
CAN'T

Poll

- How many are using ArcGIS Pro
- How many are using Tasks

“The right tool in the right time”

Create New Building Workflow



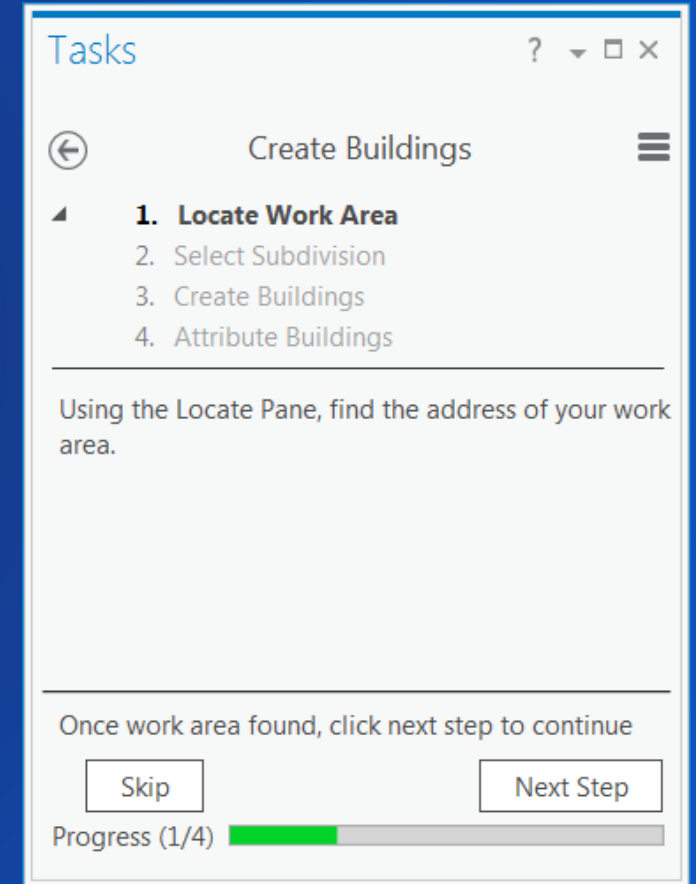
Demo: Create new building workflow

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What is a task?

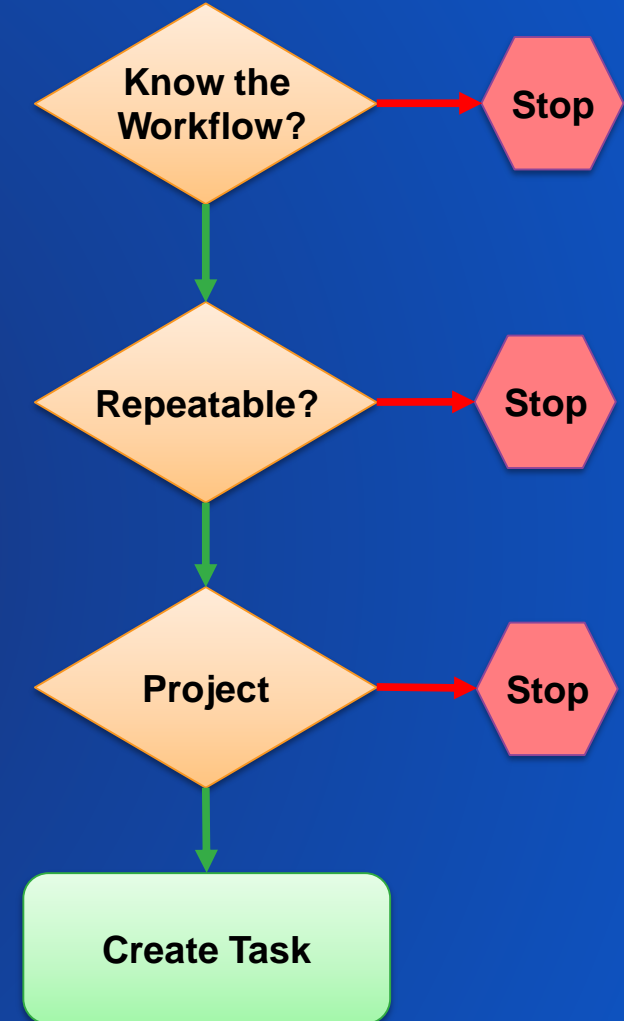
- You can configure **sequential** steps that guide users through a **repeatable workflow**
- Tasks:
 - Used to **guide** and share knowledge
 - Are **interactive**
 - Improve **efficiency**
 - Improve **quality**
- Tasks use your (business) language
- Tasks are configurable



"The right tool in the right time"

Design a task

- Know your business and workflows
- Repeatable workflows
- Know your project:
 - Maps
 - Layers
 - Tools
 - Add Ins
- Know your users:
 - Roles
 - License level / extensions
 - Permissions
 - Environment



Create a task

- Tasks are created in task items
 - **Task items are saved with the project**
- Run the workflow before creating the task
- Tasks are configured using the Task Designer pane
 - **Create a new task item**
 - **Create a task**
 - **Add and configure task steps**
- Add descriptions, instructions and help links

The image shows two overlapping windows of the 'Task Designer' application. The background window is titled 'Task Designer' and shows the configuration for a task item named 'Manage Address Information'. It includes fields for Name, Author (esri), and Description. The foreground window is also titled 'Task Designer' and shows the configuration for a specific step named 'Zoom to work area'. It includes fields for Name, Tooltip, Instructions, and Run/Proceed Instructions, along with a 'Step Behavior' section with radio buttons for Manual, Auto Run, Auto Proceed, and Automatic, and a checkbox for Optional.

Task Designer ? ▾ □ ×

Task Item: Manage Address Information

General | Resources

Name
Manage Address Information

Author
esri

Description
Common tasks required to centerlines with address ranges, addresses, and related mailings also includes tasks for public for apps and community mapping Online.

ArcGIS Version 11.0.0.528

Task Version
1 . 23 . 6

☐ Auto Increment

Published Version 0.23.6

Last Modified 7/7/2015

Task Designer ? ▾ □ ×

Step: Zoom to work area

General | Actions | Views | Contents

Name
Zoom to work area

Tooltip
Locate work area by address

Instructions
Use the Locate dialog to search to the work area address and zoom to it.

Run/Proceed Instructions
Click Next Step to continue

123 characters left

Step Behavior

☒ **Manual** User runs and user proceeds ⓘ

☐ **Auto Run** Step runs and user proceeds ⓘ

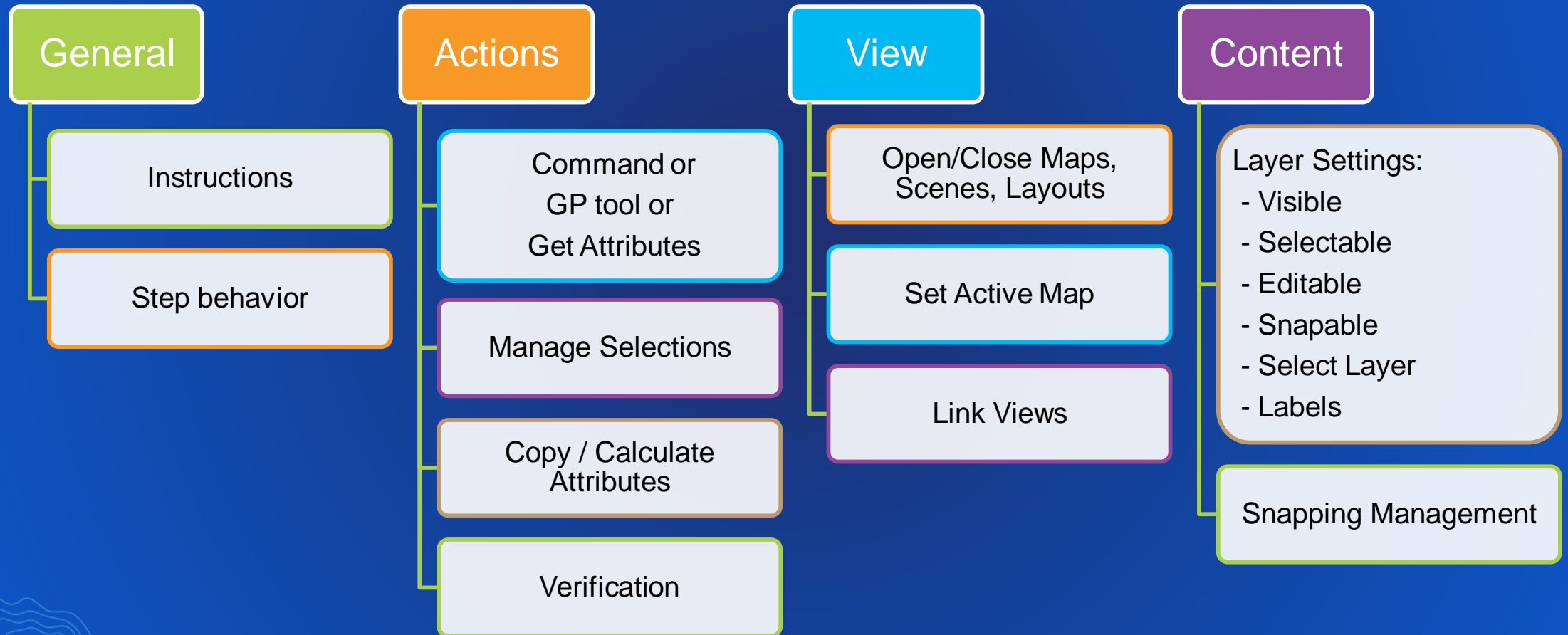
☐ **Auto Proceed** User runs and step proceeds ⓘ

☐ **Automatic** Step runs and step proceeds ⓘ

☐ **Hidden** User will not see the step

☒ **Optional** User can skip this step

Create a task step

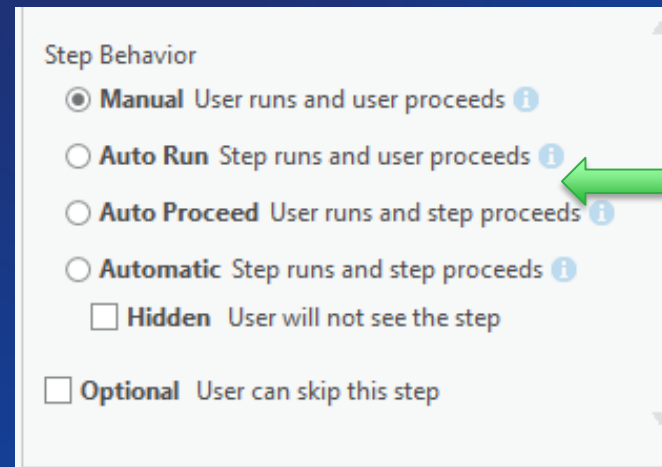


Step behavior

Define how a step moves to the next step

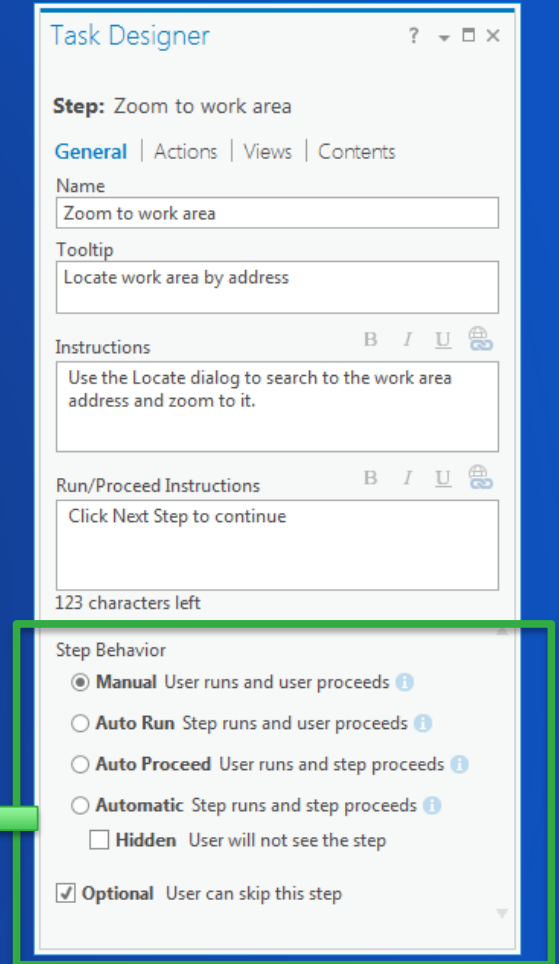
- **Manual** – click to start and click to proceed
 - 2 mouse clicks
- **Auto Run / Auto proceed** – click to start or to proceed
 - 1 mouse click
- **Automatic** – step runs and proceeds
 - no mouse clicks

Efficiency



Step Behavior

- ☒ **Manual** User runs and user proceeds *i*
- ☐ **Auto Run** Step runs and user proceeds *i*
- ☐ **Auto Proceed** User runs and step proceeds *i*
- ☐ **Automatic** Step runs and step proceeds *i*
- ☐ **Hidden** User will not see the step
- ☐ **Optional** User can skip this step



Task Designer

Step: Zoom to work area

General | Actions | Views | Contents

Name
Zoom to work area

Tooltip
Locate work area by address

Instructions
Use the Locate dialog to search to the work area address and zoom to it.

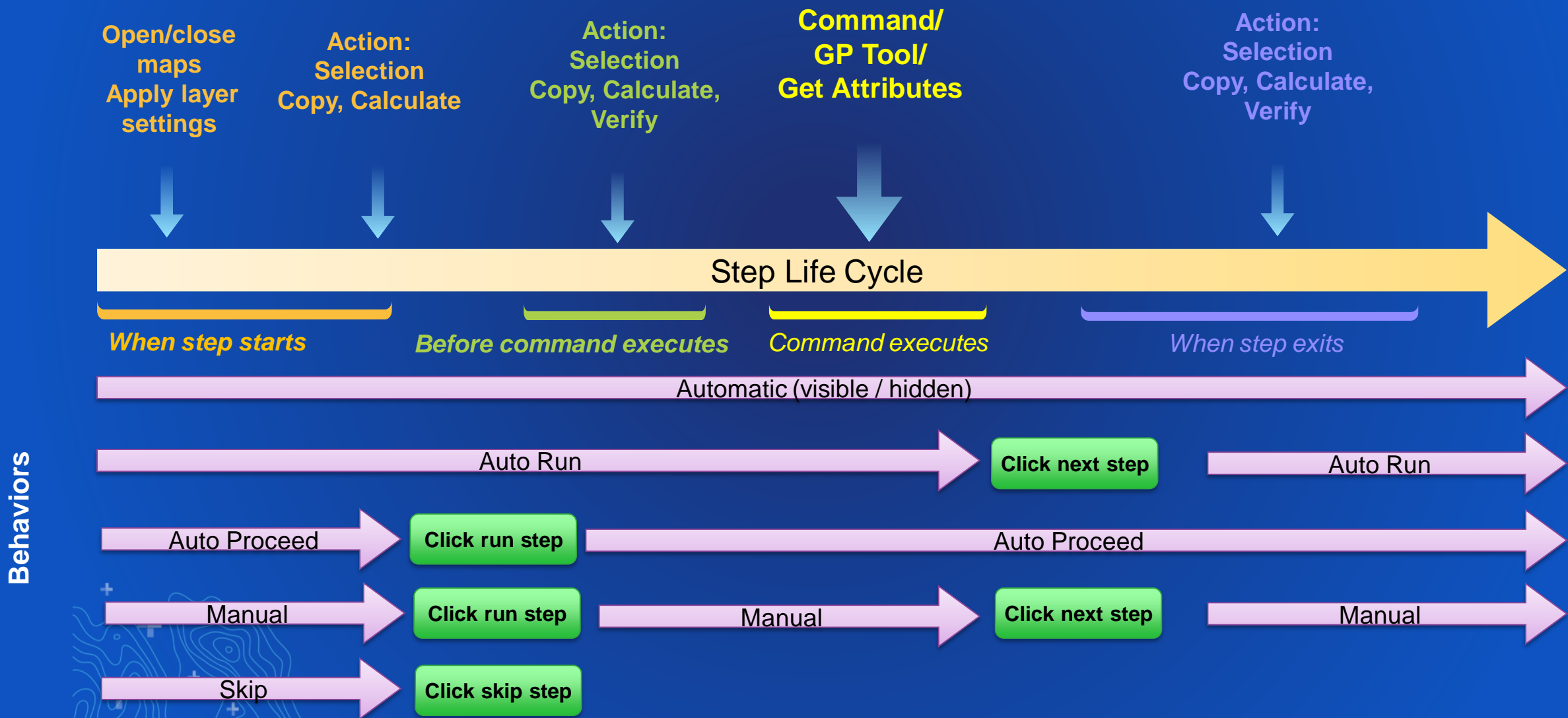
Run/Proceed Instructions
Click Next Step to continue

123 characters left

Step Behavior

- ☒ **Manual** User runs and user proceeds *i*
- ☐ **Auto Run** Step runs and user proceeds *i*
- ☐ **Auto Proceed** User runs and step proceeds *i*
- ☐ **Automatic** Step runs and step proceeds *i*
- ☐ **Hidden** User will not see the step
- ☒ **Optional** User can skip this step

Step Life Cycle





Demo: Create a task

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Create new building workflow – simplified version

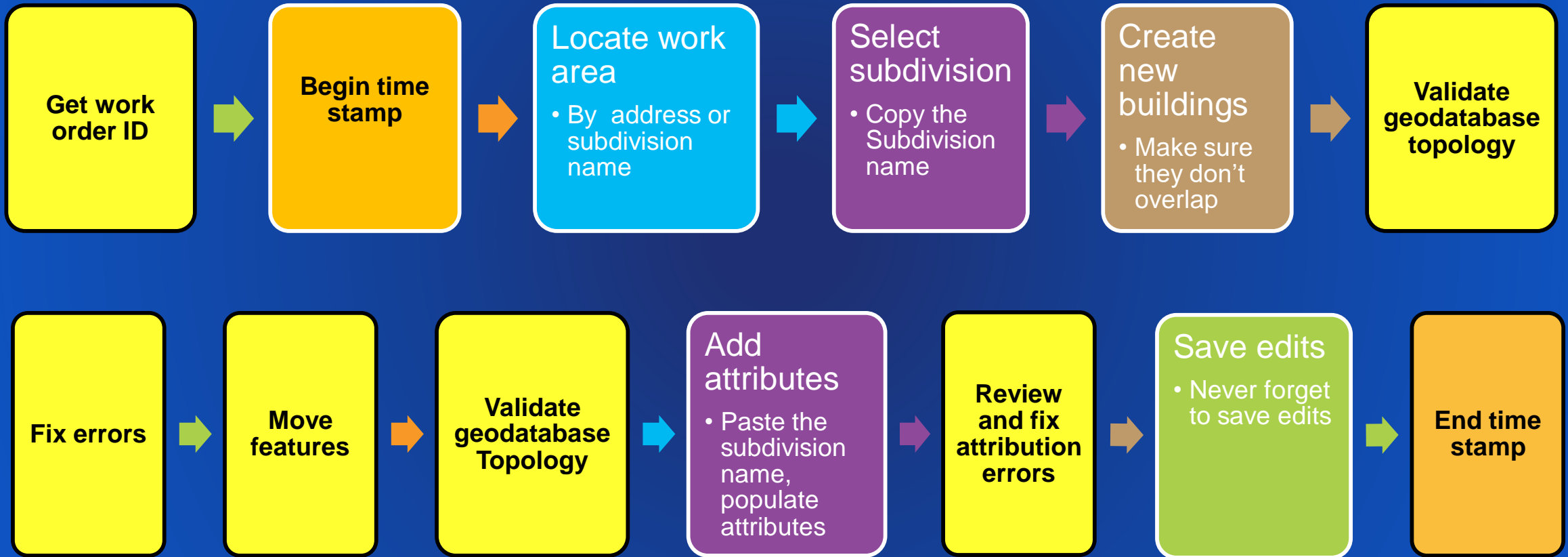


Common user errors

- Forgetting to update fields with attributes
- Adding incorrect attributes,
 - for example, typos in the subdivision name
- Selecting the wrong features
- Forgetting which features have already been created in the work order
- Reporting incorrect time-stamps (coffee breaks, emails...)



Create New Building Workflow – Real world version



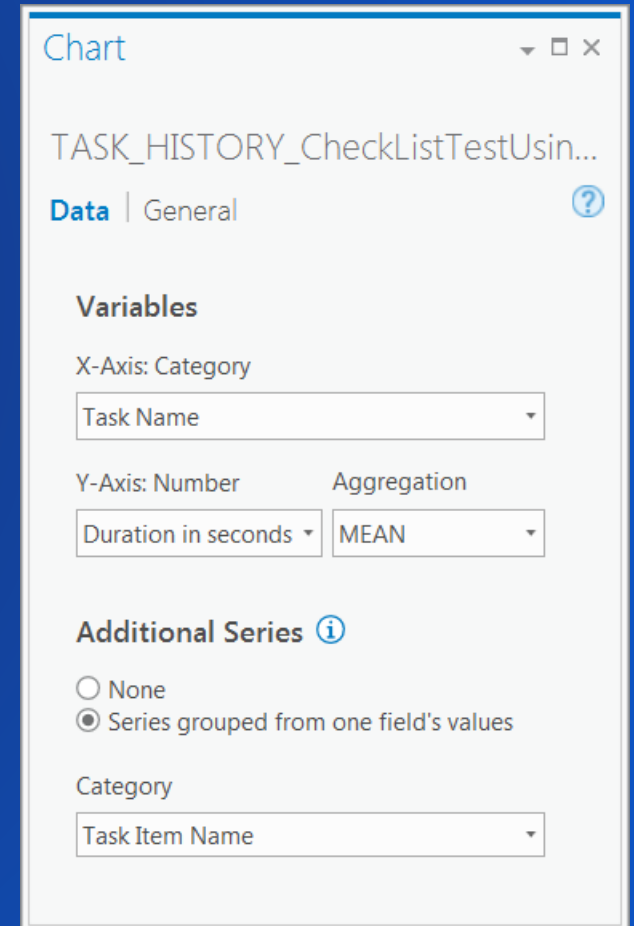
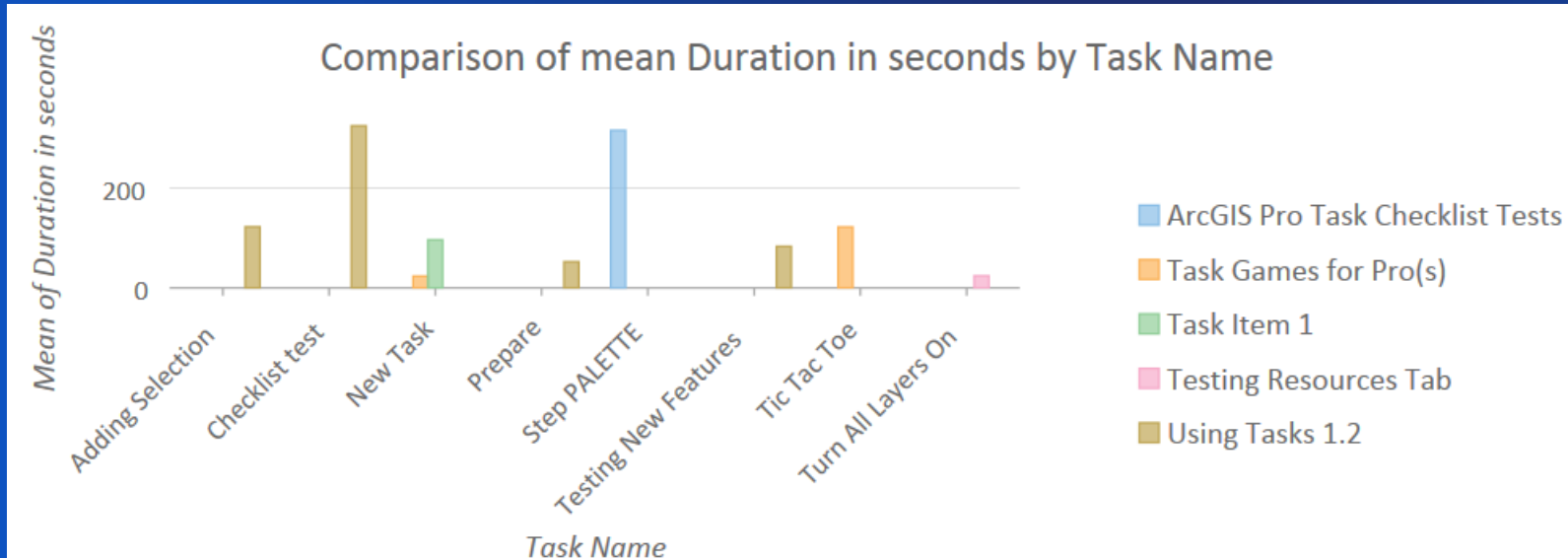
Demo: Enhanced task

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Task history (metrics)

- Optional project setting (under project options)
- Measures duration of each task; idle time is filtered out
- Tip: visualize with charts



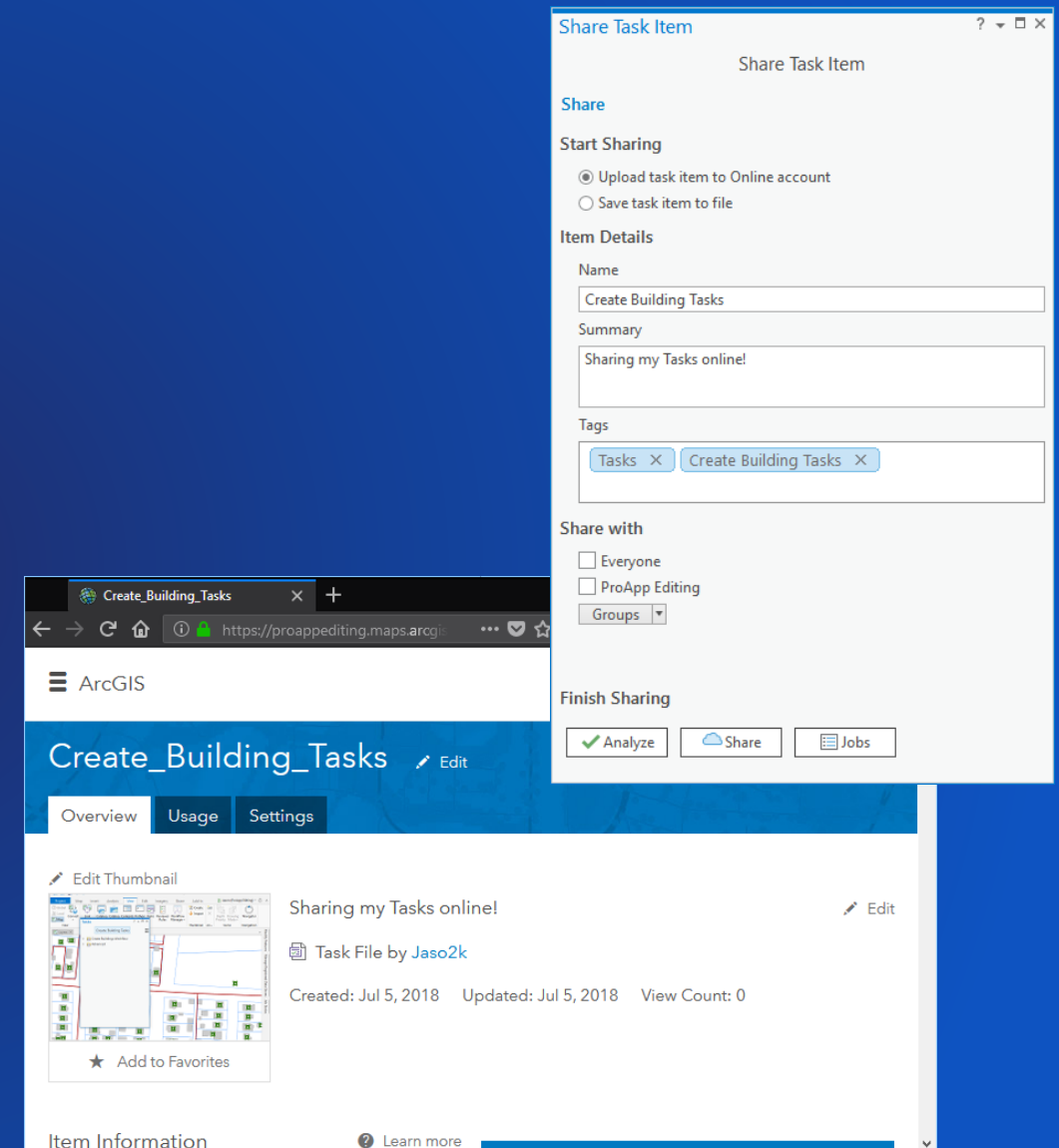
Demo: Task history

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Share tasks

- **Recommended: Share as a project package**
 - All resources (maps, layers, tools) are packaged and accessible
- **Shared to your ArcGIS Online account**
 - Share steps, guides, best practices
 - Use your own resources (maps layers, tools)
- **Shared as an .esriTaskFile**
- **Tasks can be copied and pasted to other task items and projects**



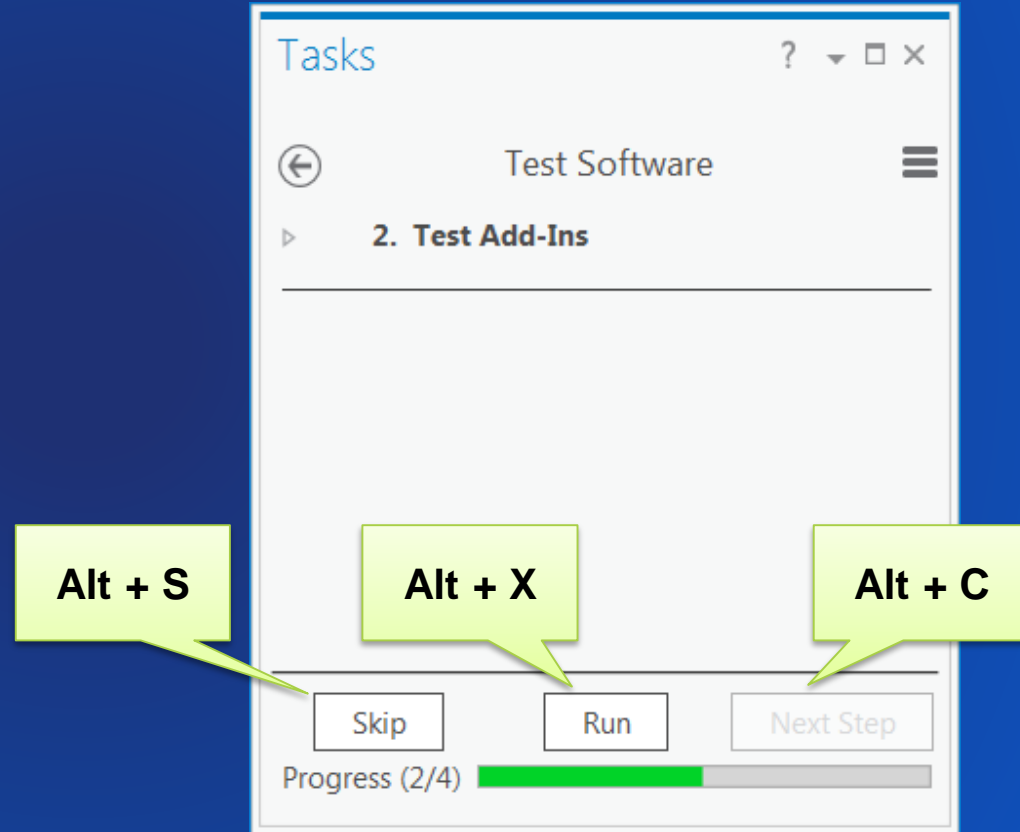
When NOT to use Tasks?

- A workflow that takes long time to execute (days)
- Task resources keep changing frequently: maps, layers, Geoprocessing tools
 - Workflow not stable yet
- Micro-management/workflow constraint tool
 - You can perform other actions while a task is running
- Does not replace Geoprocessing models:
 - Geoprocessing is used for automation
 - Tasks are interactive



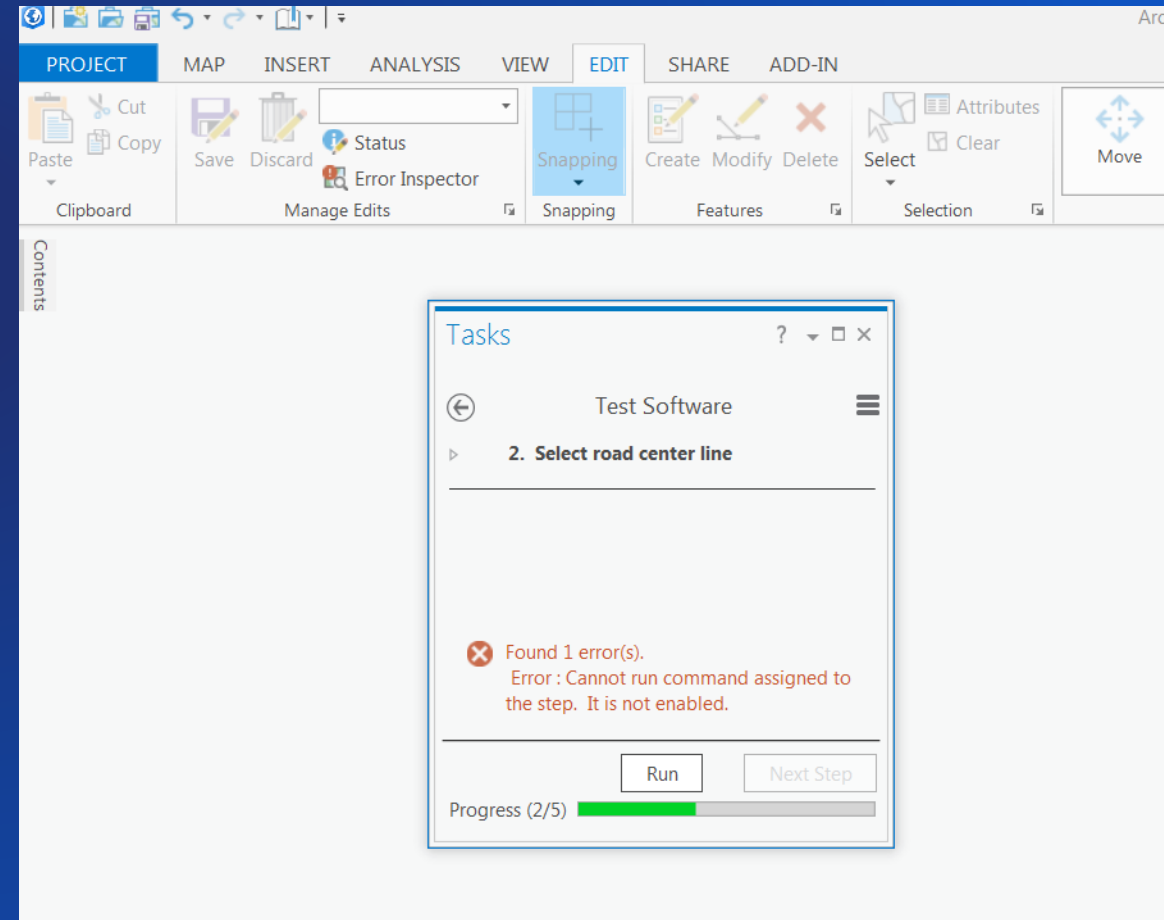
Tips & Tricks

- Global shortcuts:
 - Alt X – RUN ('eXecute')
 - Alt C – NEXT STEP ('C'ountinue')
 - Alt S – SKIP ('S'kip)



Tips & Tricks

- **When a task fails...**
 - Check if the command is enabled
 - Commands are contextual – is the map view open?
- **For example:**
 - calling the select command without an active map view



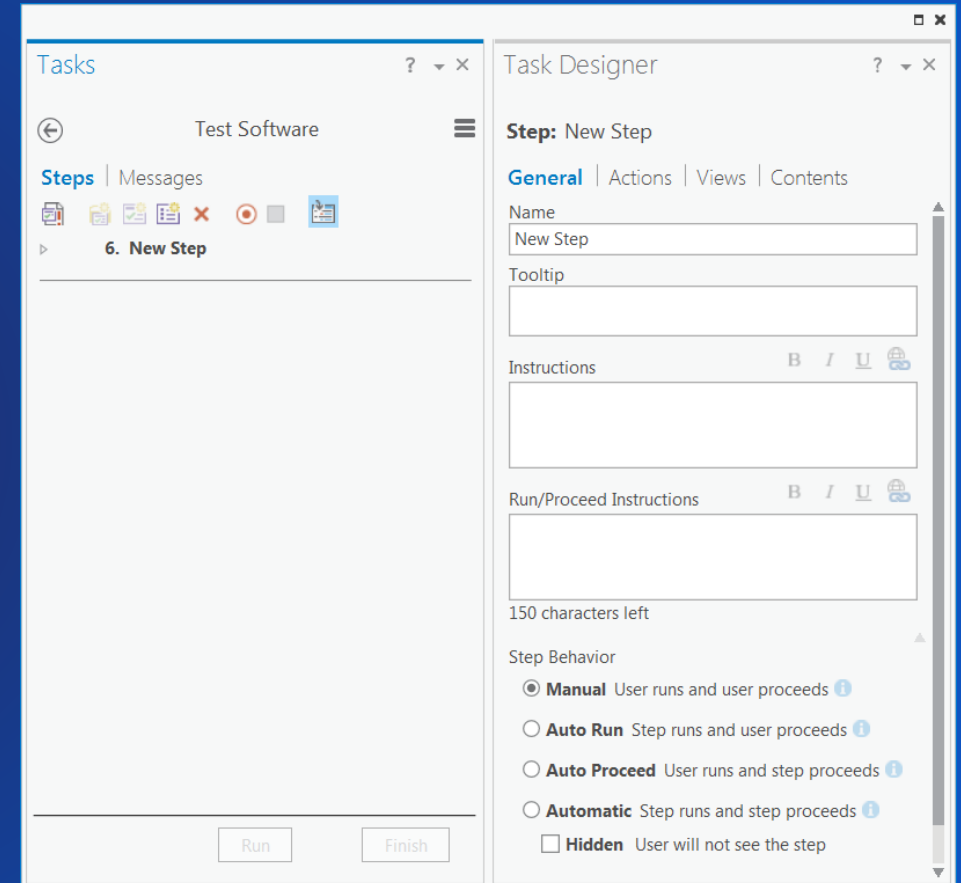
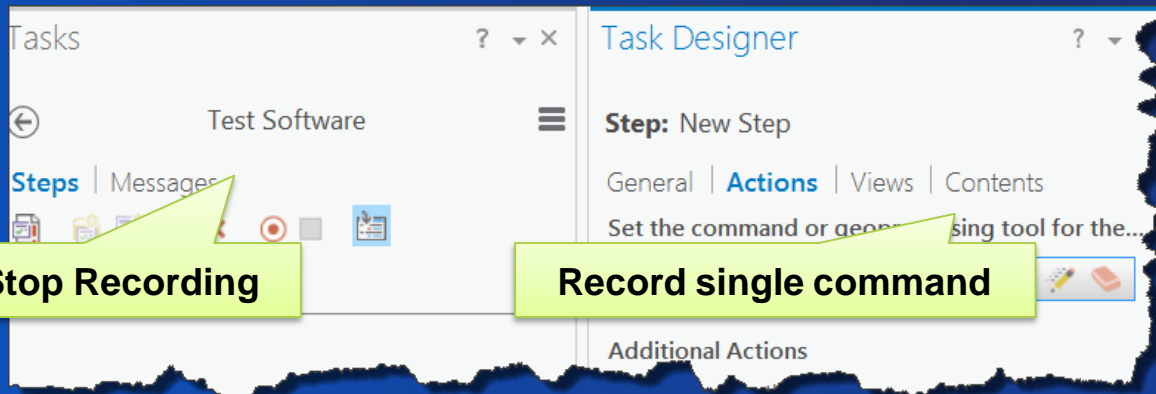
Tips & Tricks

- Close panes
 - Tasks manages the panes
- Don't dock the task pane with other panes
 - Becomes hidden
- Other actions CAN be performed while running a task
- Leave nothing to chance, your users might:
 - Close maps
 - Turn layers off
 - Clear selections
 - Unselect layers
 - ...



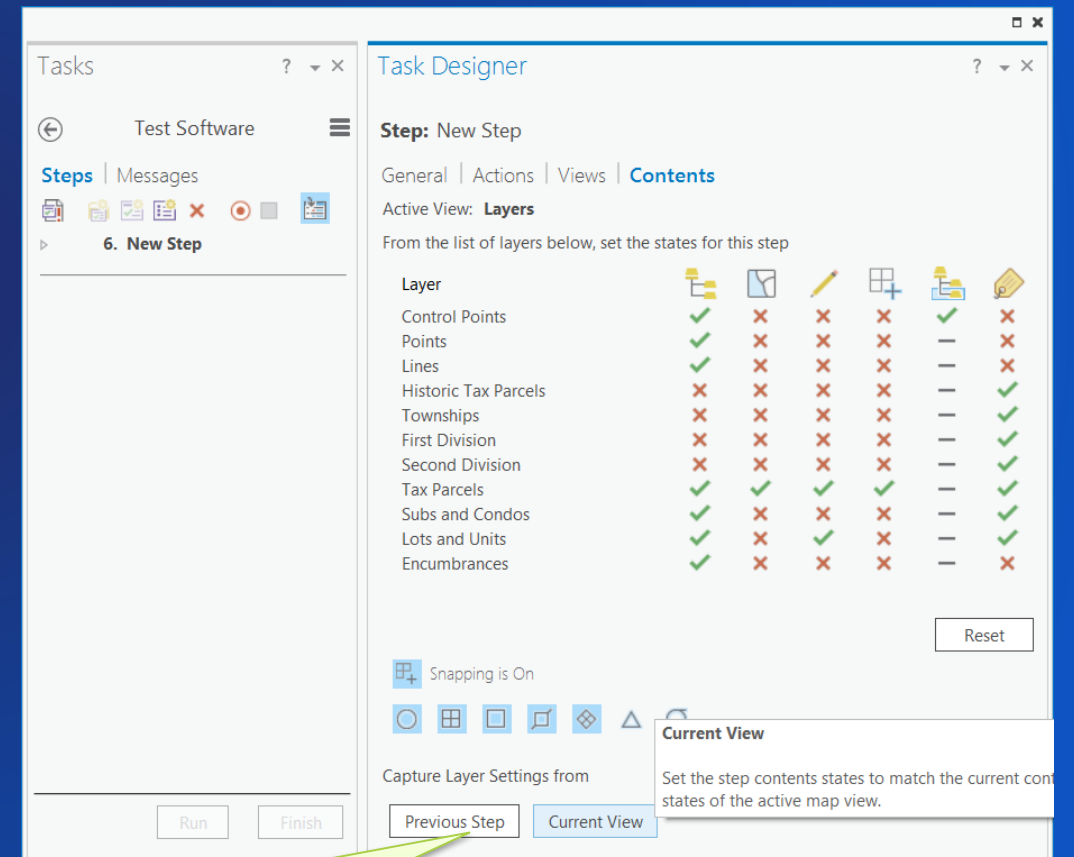
Tips & Tricks

- **When creating tasks**
 - Dock the Tasks pane and Task Designer pane side by side
- **Recording commands is easy and reliable**
 - Finds the right command



Tips & Tricks

- Capture settings from the currently open map view (contents)



Capture View State

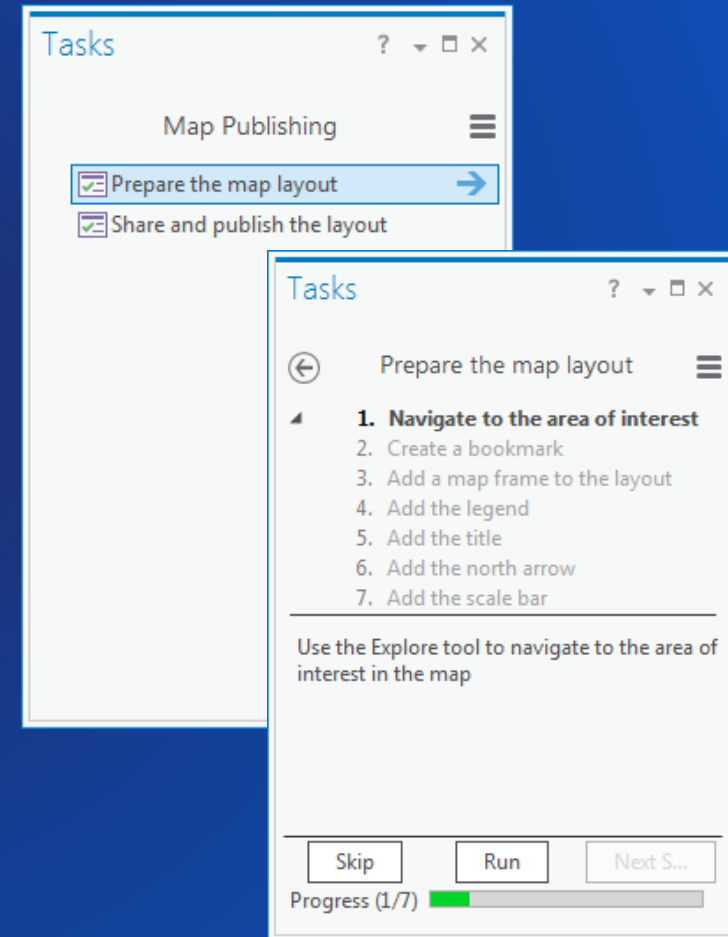
Tips & Tricks

- **Use 'Optional' step behavior**
 - User can skip steps
- **Copy and paste**
 - Copy and paste steps between tasks
 - Copy and paste tasks between task items
- **Tasks do not support 'If-Then' logic**
 - Use Geoprocessing scripts/models for step commands



Summary - Tasks share knowledge

- **Define best practice workflows**
 - Useful when there are multiple ways to do the same workflow
 - Reduce confusion
 - Improve quality & Consistency
- **Guide**
 - Provide dynamic help / instructions
 - Link to additional resources
 - Use your (business) language
- **Share**
 - Export a 'Task Item' to a 'Task File'
 - Upload task file to ArcGIS Online



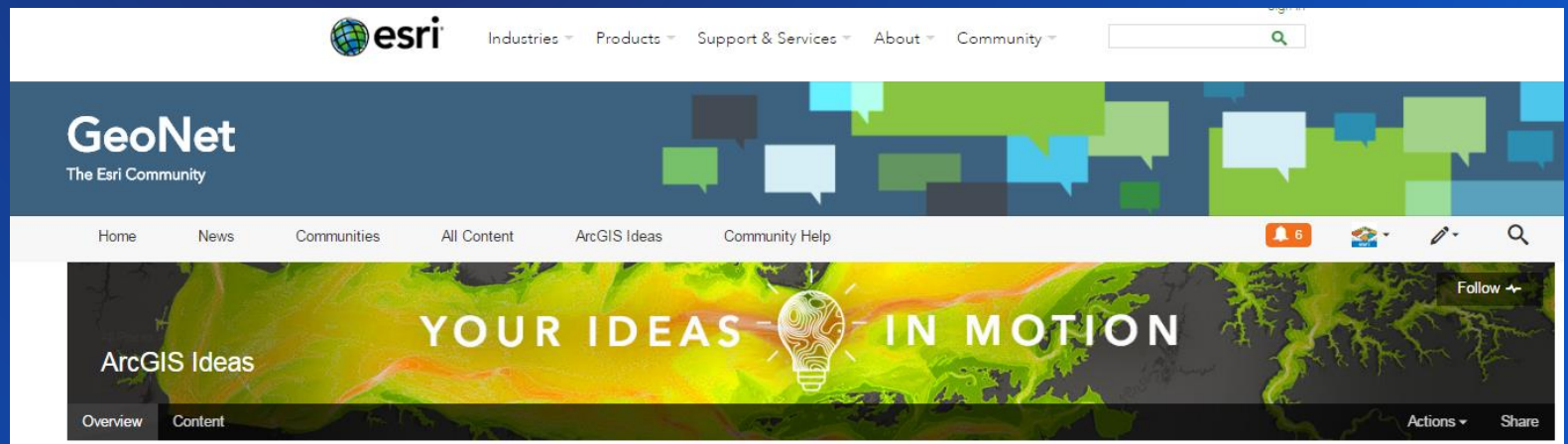
Tasks are interactive

Want to learn more?

- **Software help documentation**
 - [Tasks in ArcGIS Pro](#)
- **UC Hands-On Learning Lab**
 - [Using Tasks in ArcGIS Pro Lesson](#)
 - [Open Tuesday, Wednesday, Thursday 9.00am – 6:00pm, Ground Level Exhibit Hall A SDCC](#)
- **Demo theatre**
 - [Wednesday 12:15pm, Demo theatre 4](#)
- **Training:**
 - [Create and share ArcGIS Pro Tasks \(60 minutes, free\)](#)
 - [Automating Workflows Using ArcGIS Pro Tasks \(3 hours\)](#)
- **Videos: [esri](#) / [YouTube](#)**

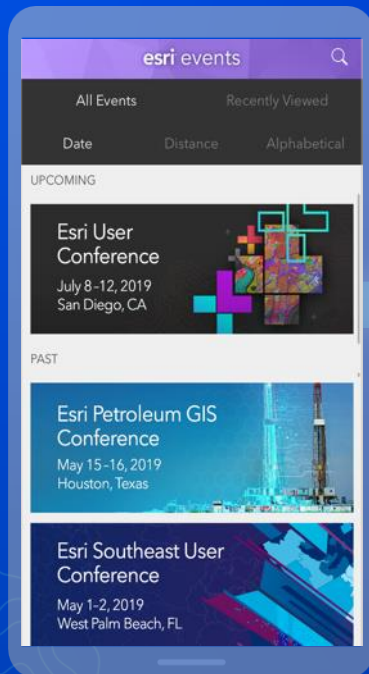
Join the Task Force

- **Contribute your ideas:**
 - Geonet ideas: <https://geonet.esri.com/community/arcgis-ideas>
- **Visit us at the ArcGIS Pro Island:**
 - Christine Leslie
 - Jason Camerano
 - Amir Bar-Maor
 - Narelle Chedzey

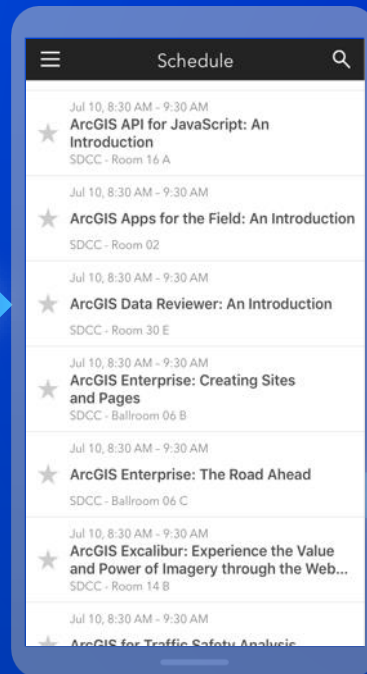


Please Share Your Feedback in the App

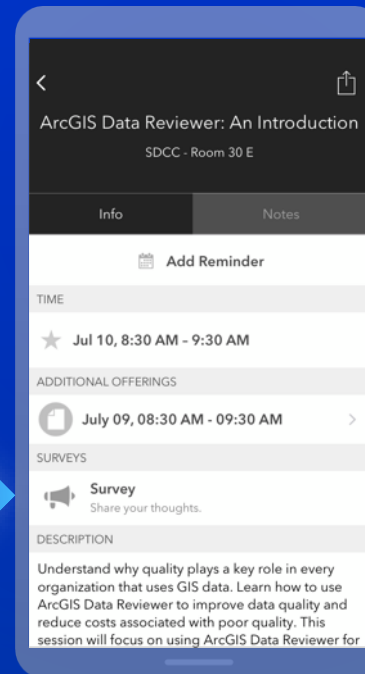
Download the Esri Events app and find your event



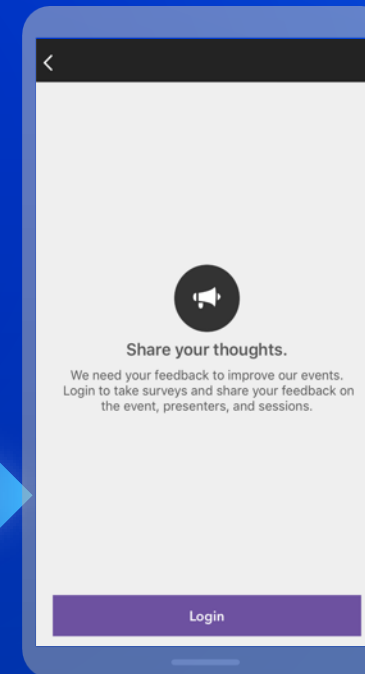
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Scroll down to "Survey"



Log in to access the survey



Complete the survey and select "Submit"

