

Tasks in Field Maps

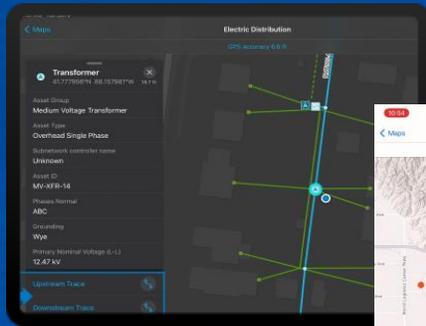
ArcGIS

Supports Teams in the Field

Mobile Data Collection
Enterprise Data Access



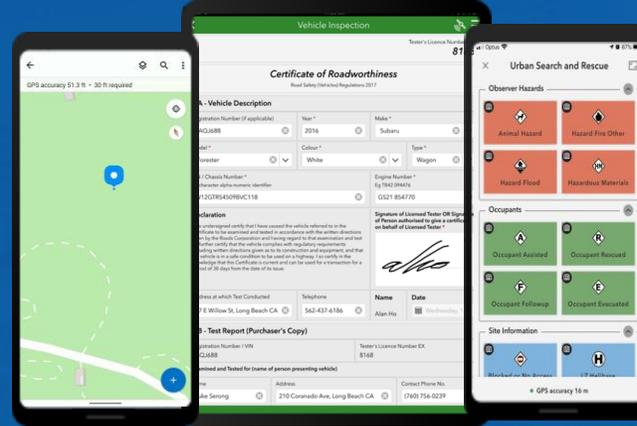
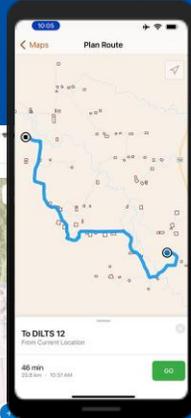
Situational Awareness



Field Maps



Navigator



Field Maps

Survey123

QuickCapture

New & Improved

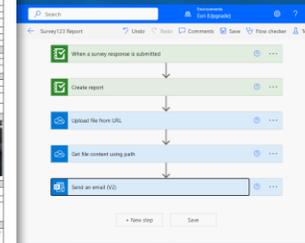
- Task Coordination
- Edit And Trace The Utility Network
- AI Assistants
- Templates & Offline Readiness Assessments
- Improved User Experience
- ArcGIS Connector For Microsoft

Synchronizing
Office & Field Activities

Plan, Optimize
& Coordinate

Connected &
Disconnected

Integration



... Integrating Mobile Workflows
Enhancing the Operational Picture. . .

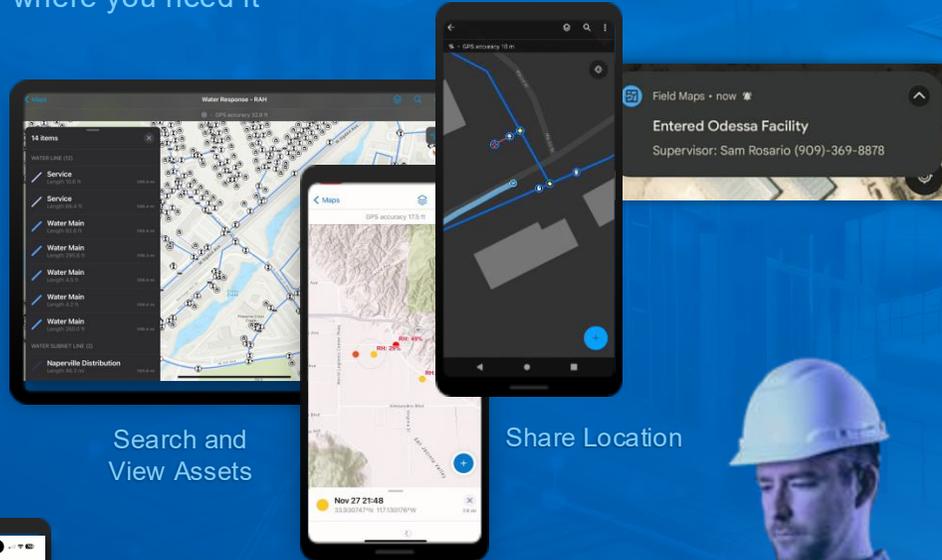
ArcGIS Field Maps

A comprehensive mobile GIS solution for field teams

- Easy to Use
- Connected and Offline
- Streamlined Data Collection
- Data Informed Decisions
- Flexible Configuration
- Scalable Deployment
- Integrate with business systems

Advance Awareness

Up-to-date information when you need it, where you need it

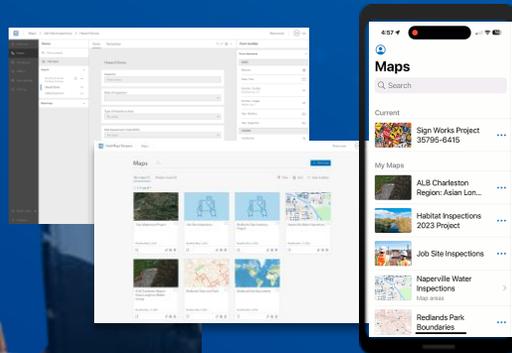


Search and View Assets

Share Location

Plan & Coordinate

Design field workflows



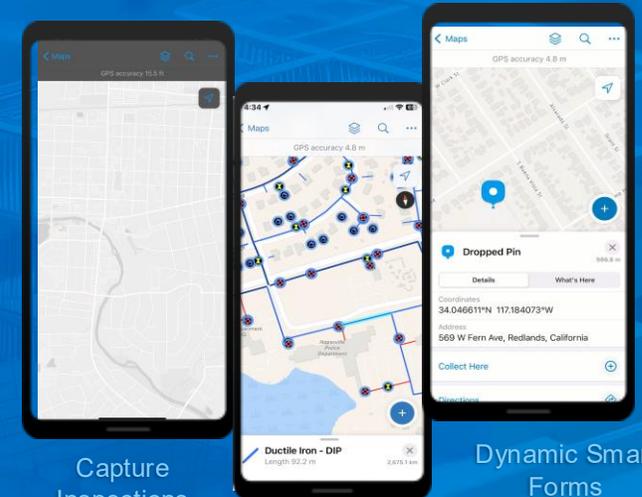
Task coordination

Configure mobile experience

Optimize maps

Data Capture

Intuitive and powerful collection tools



Capture Inspections

Capture with high accuracy

Dynamic Smart Forms

Integration

Connecting systems, reducing siloes

Automation



Location providers

Work Order Management



Planning and coordination

The backbone of efficient field operations

In field operations, planning and coordination activities are vital to keeping things running smoothly.

Activities include planning project workflows, building maps, organizing data, detailing and managing the work, and facilitating coordination between office and field, ensuring associates have the most up-to-date information.



Tasks

Planning and coordinating field workflows

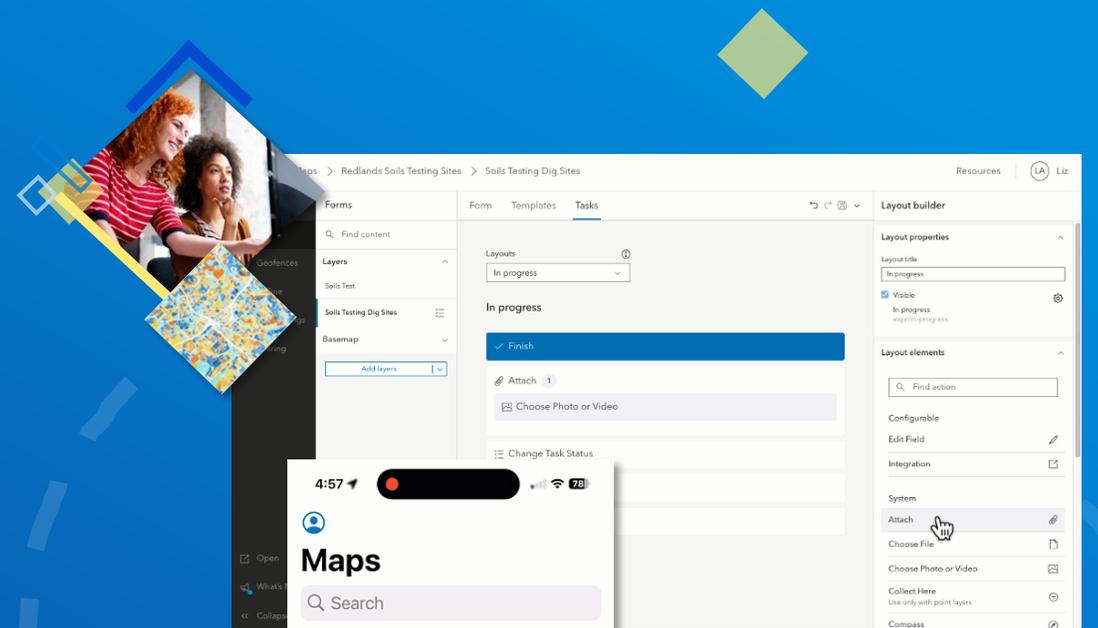
Introducing the Tasks capability

Dynamic, actionable to-do lists in the field

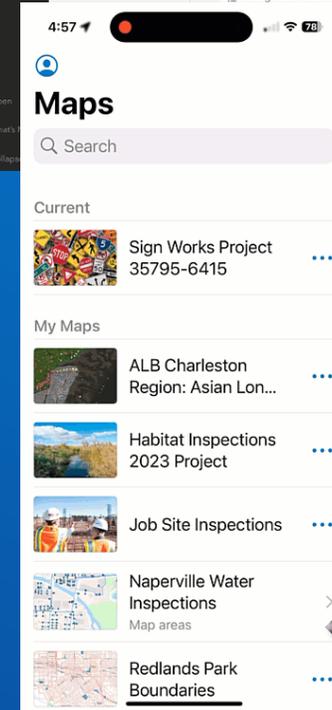
Tasks is designed to **coordinate and manage** individual assignments that need to be completed in the field.

Key Market needs:

- Create, assign, and prioritize work
- Real-time coordination
- Configure to workflows
 - Create tasks in the field
 - Pick up unassigned work
 - Flexible but easy to get started
- Track work progress
- Integrate with existing business systems and apps



Build task workflows in Field Maps Designer

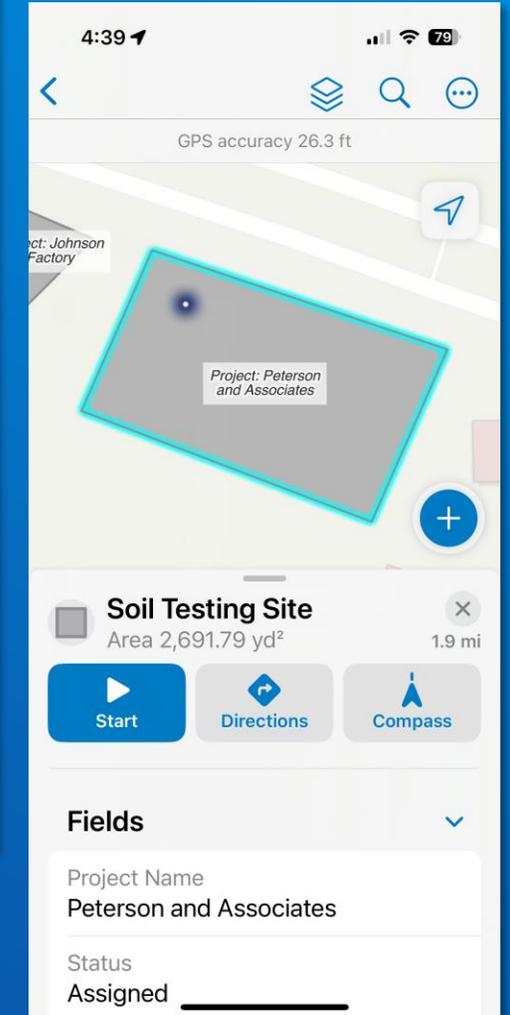
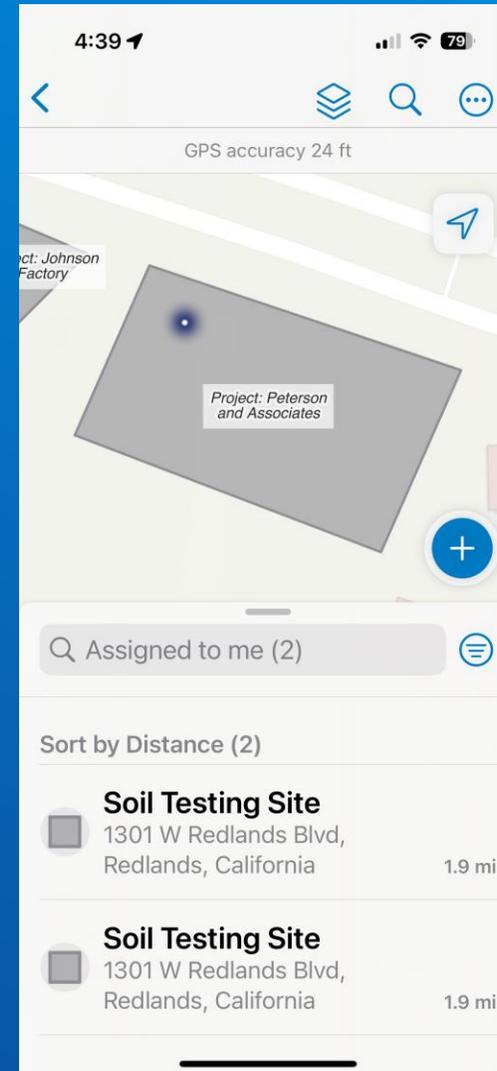


Complete tasks from to-do list in Field Maps mobile app

What can tasks do?

With tasks, mobile workers can:

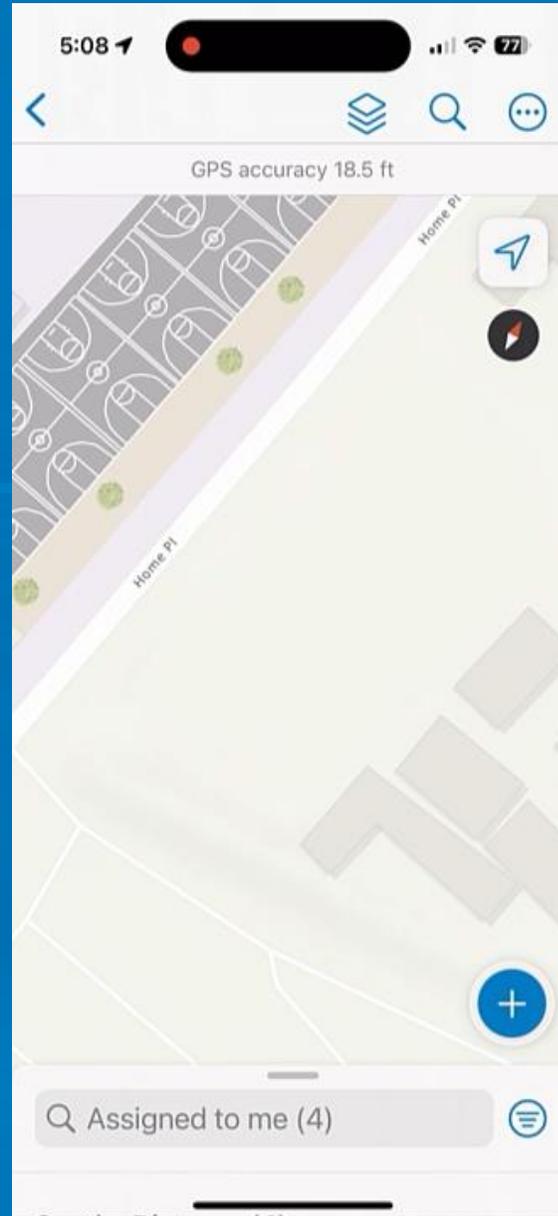
- **View & access** task details
- **Sort and filter** tasks
- **Navigate** to the job site
- Complete their work with configurable, context-driven **task actions**
- **Create and assign work** in the field
- Work with tasks both **online and offline**, **indoors and outdoors**



A task-enabled layer can be point, line, or polygon!

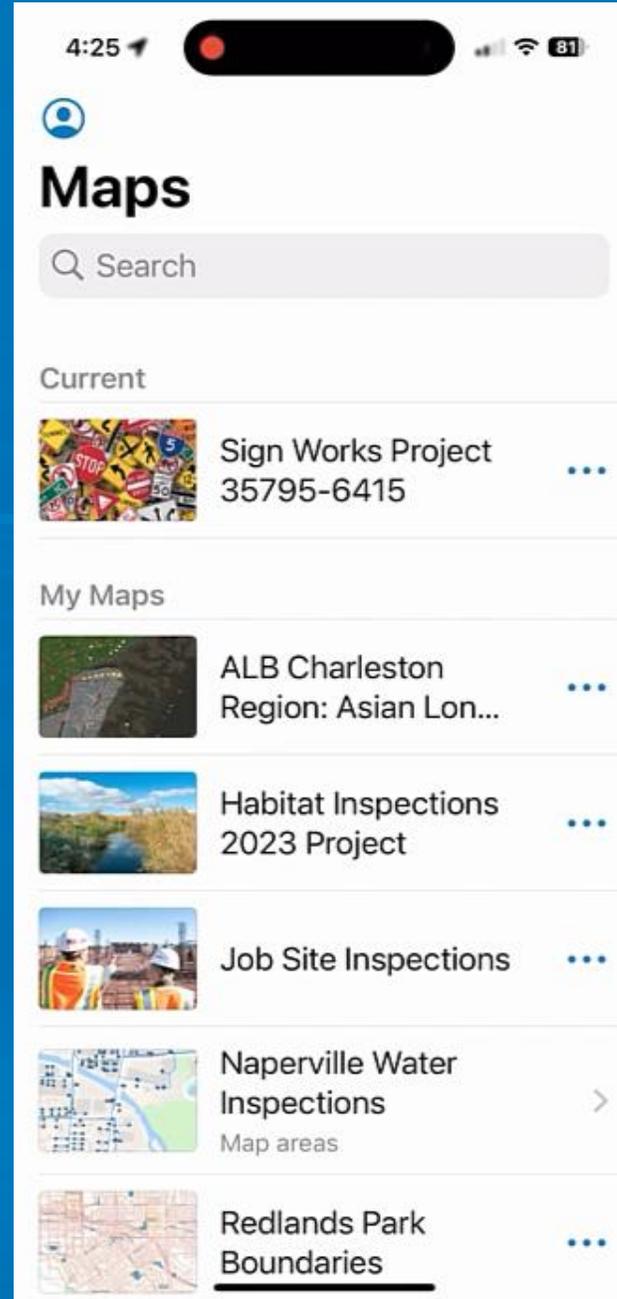
DEMO

Mobile worker
creates a new
task in the field



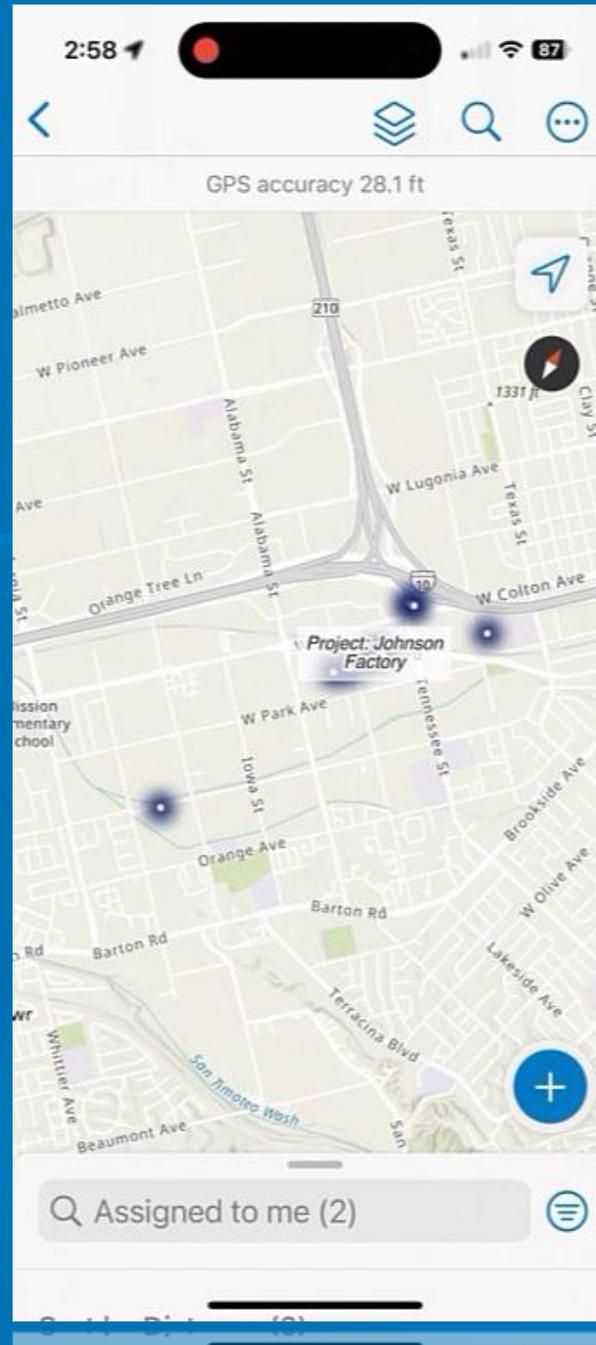
DEMO

Mobile worker
picks up
unassigned task



DEMO

Mobile worker
completes a task



Working with Tasks

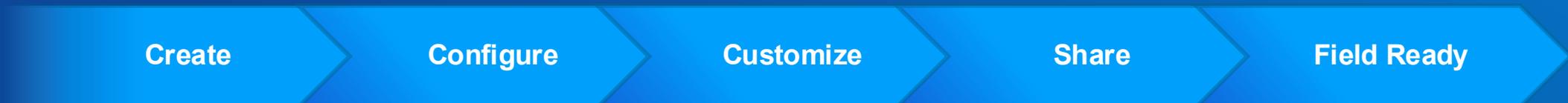
Defaults to get you started

Flexibility to configure

Prepare tasks for the field

Getting started with task-enabled feature layers

- **Create** – enable tasks layer
- **Configure** – define task types, assignees, task list filters & other settings
- **Customize** – enhance tasks to fit your needs (form, popup, actions...)
- **Share** – map & tasks layer
- **Field ready!**



... a tasks layer is a feature layer

Enabling tasks

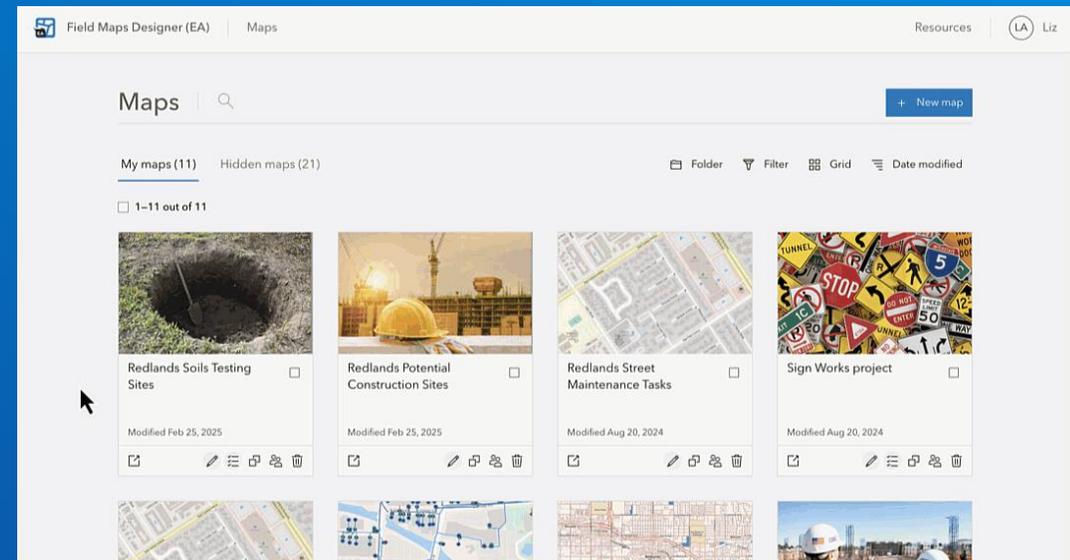
Getting started with task-enabled feature layers

Create a new task-enabled feature layer in Field Maps Designer

- Comes with out-of-the-box defaults fields, settings, and configurations, including the **required fields** that drive tasks.

Enable existing layer for tasks

- Convert an existing **referenced** or **hosted feature layer** into a task-enabled layer.
- ADD the **required fields** to your existing layer.



*Create new task-enabled layer
in Field Maps Designer*

DEMO

Map author
creates a new
task-enabled layer

The screenshot displays the 'Field Maps Designer (EA)' application interface. At the top, the title bar shows 'Field Maps Designer (EA)' and 'Maps'. On the right, there are 'Resources' and a user profile for 'Liz'. Below the title bar, the main content area is titled 'Maps' with a search icon and a '+ New map' button. The interface shows a list of map projects under the 'My maps (10)' tab. The projects are displayed in a grid with the following details:

- Sign Works project**: Modified Jul 2, 2024. Thumbnail shows various traffic signs.
- Tree Inspections Project**: Modified Jul 1, 2024. Thumbnail shows an aerial view with green overlays.
- Invasive Pest Status - RAH**: Modified Jun 28, 2024. Thumbnail shows a satellite view with green dots.
- Redlands Street Maintenance**: Modified Apr 9, 2024. Thumbnail shows a street map.

Each project card includes a checkbox, a title, a modification date, and a set of action icons (edit, share, delete, etc.). The interface also features navigation options like 'Folder', 'Filter', 'Grid', and 'Date modified'.

DEMO

Map author enables an existing layer for tasks

The screenshot displays the Microsoft Maps application interface. At the top, the breadcrumb navigation shows 'Maps > Construction Site Soils Testing'. In the top right corner, there are links for 'Resources' and a user profile icon labeled 'LA Liz'. On the left side, a dark sidebar contains navigation options: Overview, Forms (selected), Geofences, Offline, App settings, and Sharing. The main content area is divided into two sections. The left section, titled 'Forms', includes a search bar labeled 'Find content', a 'Layers' section with a sub-section 'Soils Test', and a 'Basemap' section with a dropdown menu labeled 'Add layers'. A mouse cursor is positioned over the 'Add layers' dropdown. The right section of the main content area is a large white space containing a clipboard icon and the text 'Canvas is empty' followed by the instruction 'Select an item in the Forms panel to configure its templates and form.'

<< Collapse

< What's Next

Open

Understanding the task-enabled layer

The task information model

Required fields drive the tasks capability

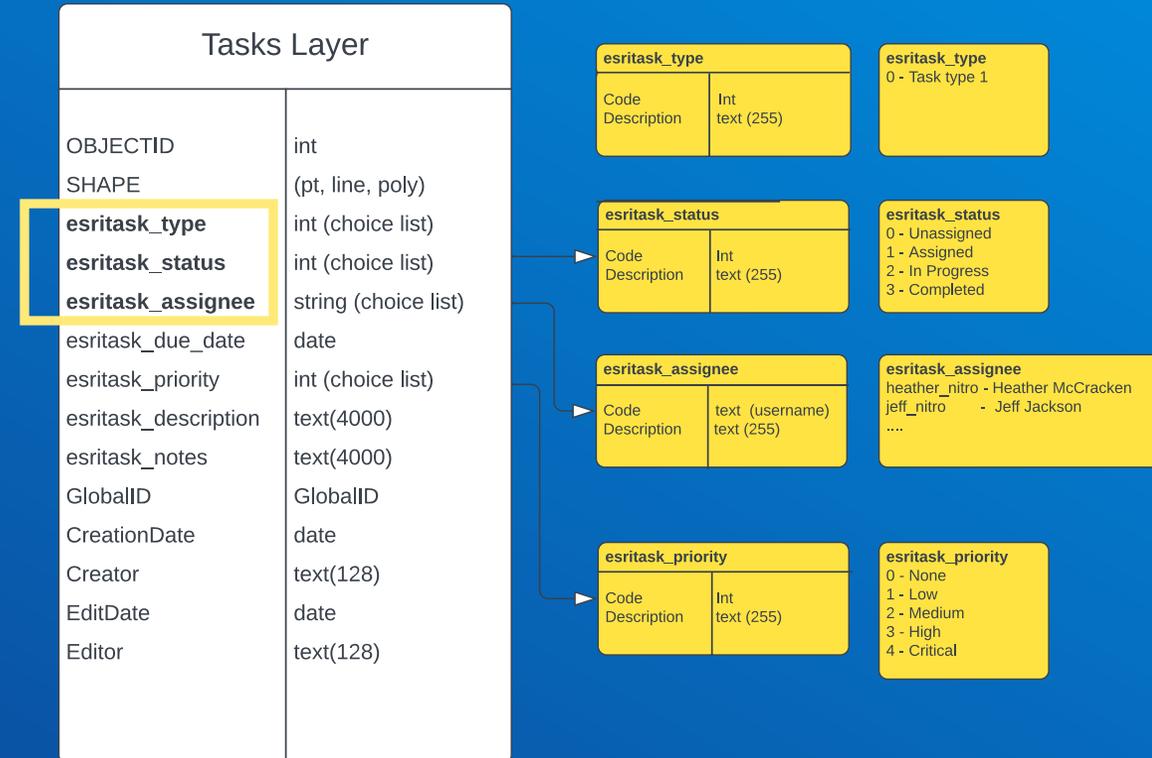
- **Task type** – Define types of work. You must configure at least one task type.
- **Status** – Use defaults provided or customize
- **Assignee** – Workers in your organization or partnered organizations. You must configure at least one worker.

Extend schema to customize workflows

- Fields can be added/removed to form (non-required fields)
- Field values can be customized

Task-enabled layer capabilities

- Enabled with editor tracking and sync
- Support hosted or referenced feature services



DEMO

Map author
configures
required fields

The screenshot shows a web-based interface for configuring map tasks. The breadcrumb navigation at the top reads 'Maps > Redlands Street Maintenance Tasks > City Street Maintenance Tasks'. The user is identified as 'Liz' with initials 'LA'. The interface is divided into three main sections:

- Left Sidebar:** A dark sidebar with navigation options: Overview, Forms, Geofences, Offline, App settings, Sharing, Open, What's Next, and Collapse.
- Forms Panel:** A light gray panel with a search bar 'Find content'. Under the 'Layers' section, 'City Street Maintenance Tasks' is selected. Other layers include 'Fire Hydrants', 'Street Trees', and 'Street Sign'. A 'Basemap' section has an 'Add layers' button.
- Tasks Panel:** The main workspace, titled 'Tasks', shows a 'Layouts' dropdown set to 'All' with a '+ New layout' button. It features four task status cards: 'Unassigned', 'Assigned', 'In progress', and 'Completed'.
 - Unassigned:** Includes a blue 'Pick up' button, 'Directions', and 'Compass'.
 - Assigned:** Includes a blue 'Start' button, 'Directions', and 'Compass'.
 - In progress:** Includes a blue 'Finish' button, 'Note', 'Attach', 'Status', and '+ 2 more actions'.
 - Completed:** Includes 'Status', 'Directions', and 'Compass'.

A 'Task settings' icon is visible in the top right of the main workspace.

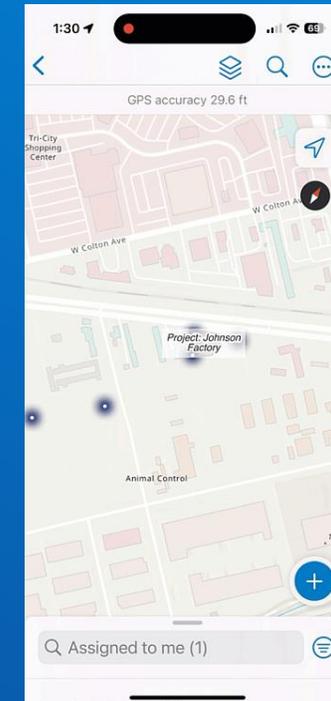
Configuring Tasks to your workflows

With extensive configuration options, map authors can tailor task workflows to meet specific project needs.

- Extend the **tasks information model** through the **form**
 - Design the information captured when a new task is created.
 - Add form elements, logic, calculations, etc.
- Define the task information shared with workers:
 - Design the **pop-up** to display important task information.
- Configure tasks workflows
 - Design the stages tasks move through with **tasks layouts**
 - Define the **actions** that can be performed at each stage
 - **Integrate** with other apps
- Configure to-do lists
 - Define the tasks that mobile workers see through **task filters**

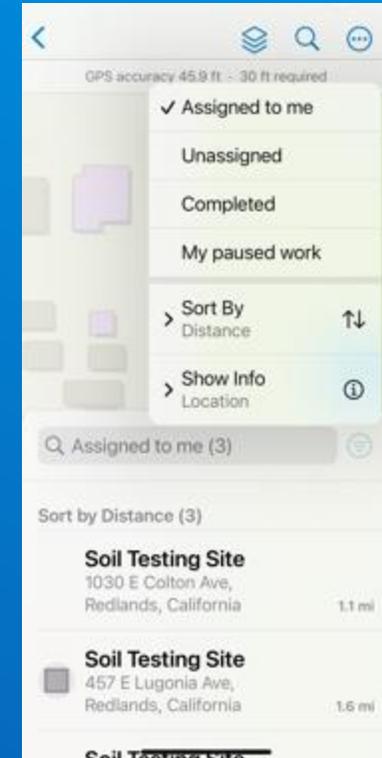
A screenshot of a mobile application form titled "Create features". The form is for "Soils Testing Dig Sites". It includes fields for "Task Type*" (Soil Testing Site), "Project Name*" (Citrus Campus Building 3), "Site ID*" (989587526), "Assignee", "Status*" (Unassigned), "Priority*" (Medium selected), and "Due Date". There are "Cancel" and "Create" buttons at the bottom.

Create & edit tasks via the form



Context driven actions

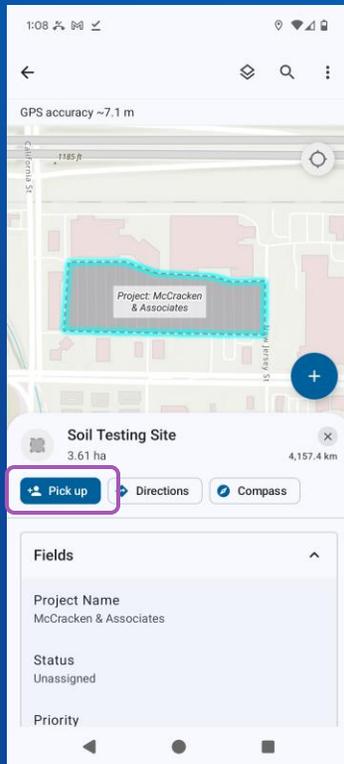
Task details shared in the pop-up



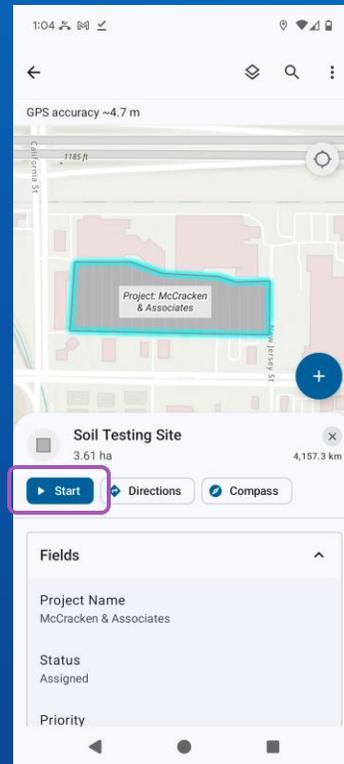
Task filters provide to-do lists

Tasks are context-driven

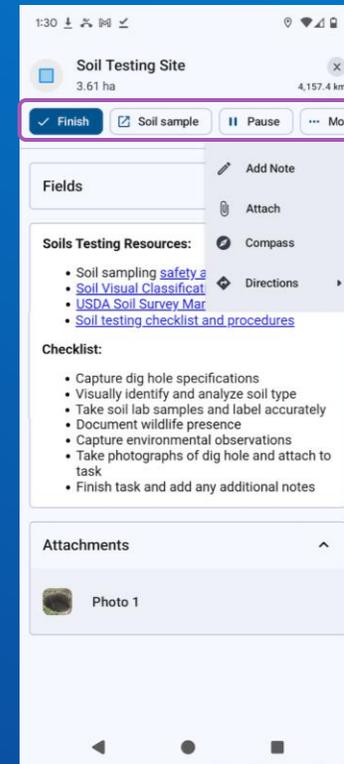
Guide mobile workers through each stage of work



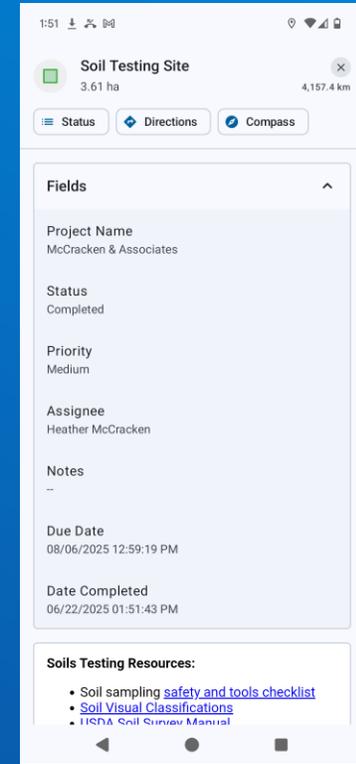
Unassigned



Assigned

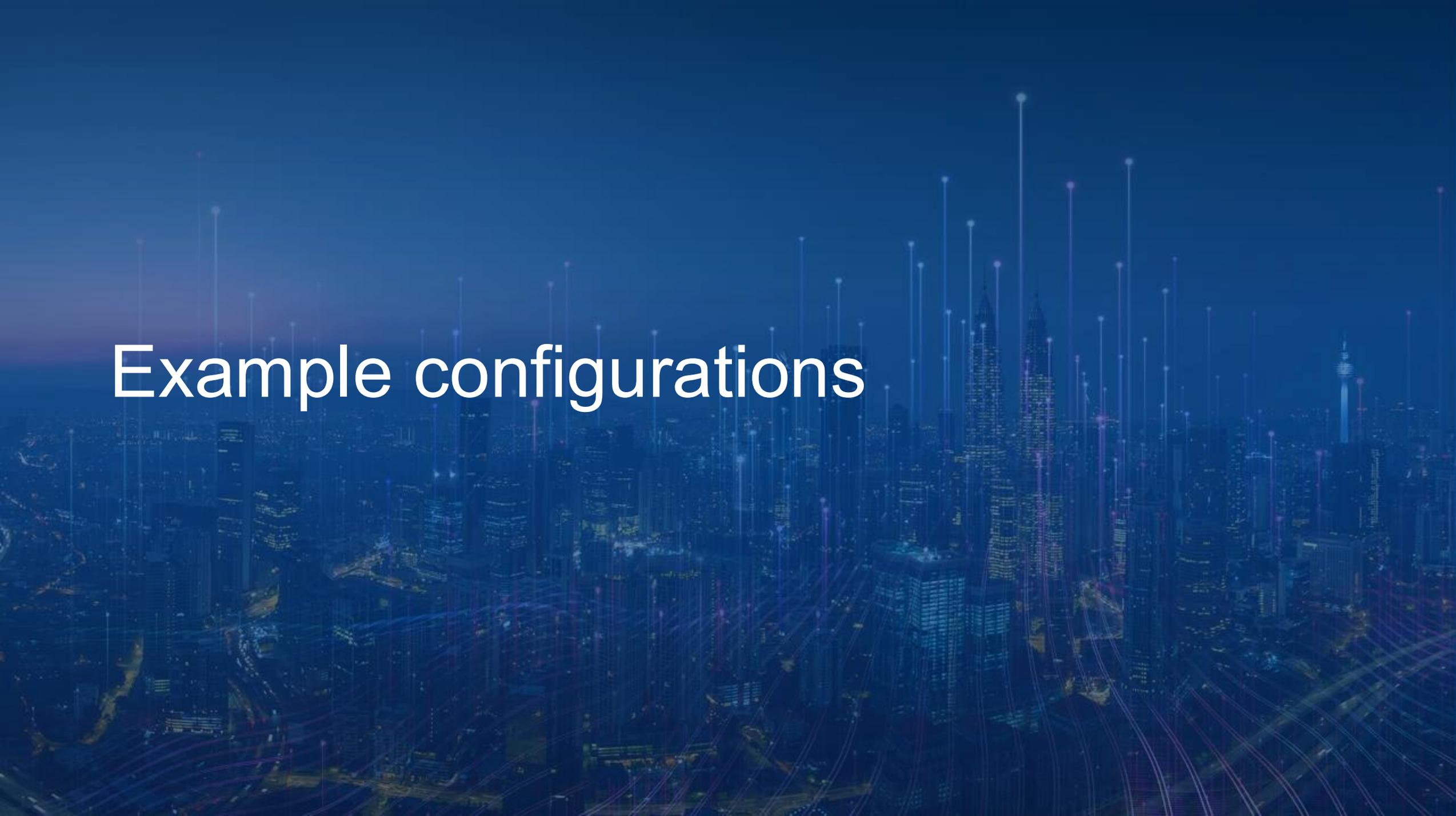


In progress



Completed

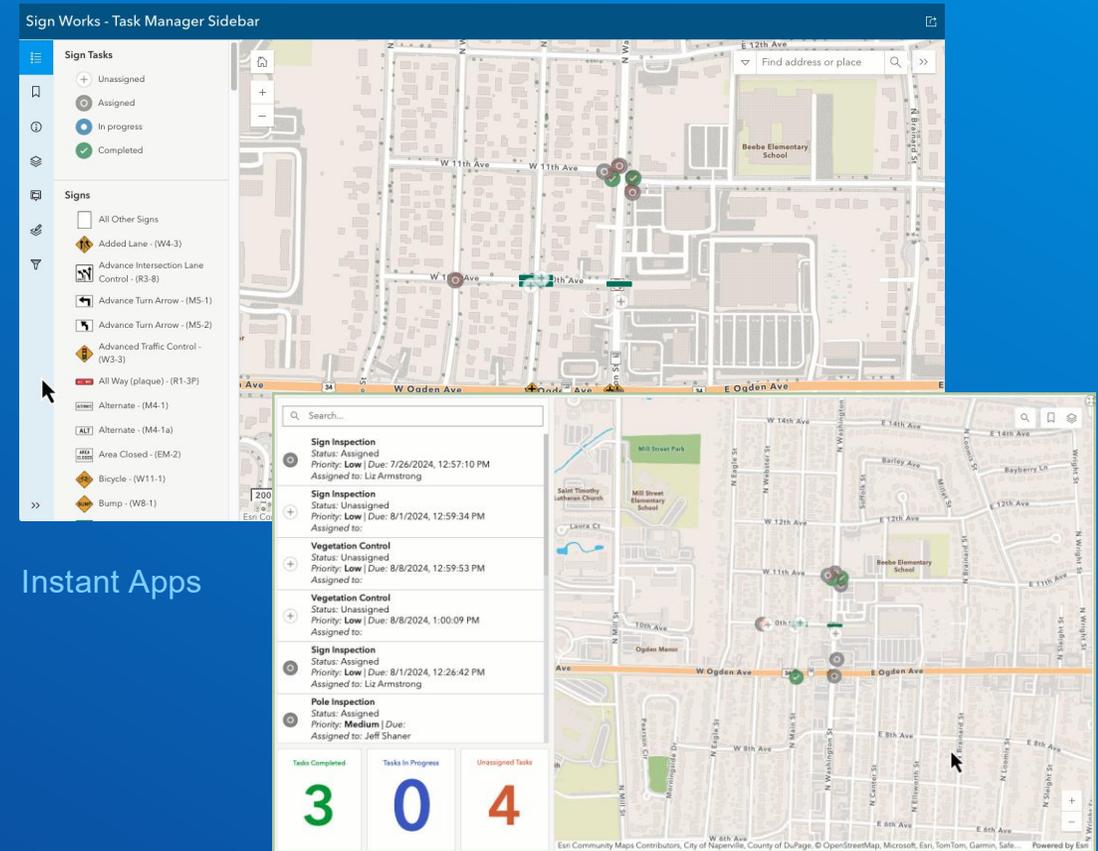
Example configurations

The background of the slide is a dark blue, high-angle view of a city at night. The city's lights are visible, and a complex network of glowing lines and nodes is overlaid on the scene, creating a digital or data-driven aesthetic. The lines are primarily vertical and horizontal, with some diagonal connections, suggesting a network or data flow. The overall color palette is dominated by deep blues and purples, with some warmer tones from the city lights.

Managing & monitoring tasks

Working with task-enabled feature layers to customize workflows

- **Editing Apps:** Create and edit tasks using any of Esri's editing applications like ArcGIS Pro, ArcGIS Map Viewer, and ArcGIS Web Editor.
- **Dispatching Experience:** Build dispatching experiences using tools like ArcGIS Instant Apps and ArcGIS Experience Builder.
- **Field Dispatching:** Mobile workers can create and edit tasks directly from the Field Maps mobile app.
- **Task Creation Automation:** Leverage the Python API or software like Workflow Manager and Microsoft PowerAutomate to automatically generate tasks
- **Reporting:** Pull task-enabled layers into Dashboards or other reporting systems to track progress.



Instant Apps

Dashboards

DEMO

Using Web Editor to create and manage tasks

Sign Works Project 35795-6415

Liz Armstrong
larmstrong_sc

Longitude -117.192552°
Latitude 34.060068°

Orangewood High School

W Stuart Ave

Texas St

Metrolink

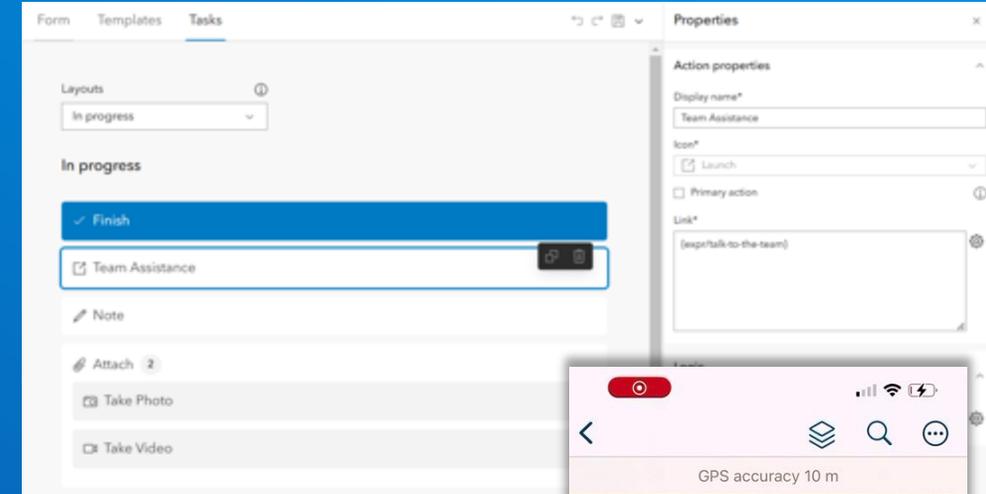
Powered by Esri

Integration with enterprise systems

Seamless synergy for your field operations

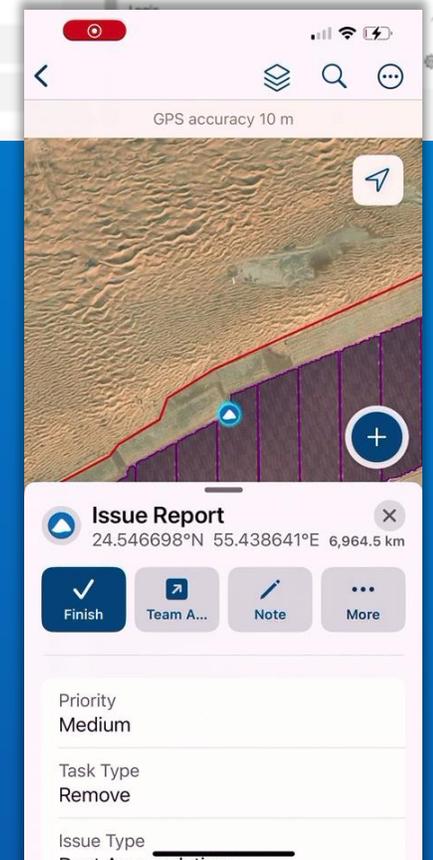
Integrating tasks with other business applications and systems enhances **efficiency** and provides **real-time insights** into field operations by ensuring data accuracy across the organization.

- **Automatic Updates:** Keep all systems up-to-date without manual intervention through tools like webhooks or scripting.
- **Integrated workflows:** Build seamless mobile experiences that exchange information between Field Maps and other mobile apps.



Example:

Build an integration action to start a Teams chat about a task



Workforce to Field Maps

Direction



Tasks in Field Maps is the replacement for Workforce.

- Workforce was deprecated on January 15th and will be retired by 2027

Tasks capabilities in Field Maps

- Customize -> Form elements, actions, symbology & pop-ups
- Worker location and status -> Location Sharing
- Notify when a task is nearby -> Geofencing
- Indoor tasks -> floor awareness, IPS, and indoor editing
- Access -> sharing model, Feature layer and Layer View privileges and capabilities

Create, assign and manage Tasks in ArcGIS system

- Build the experience your teams need with apps in the system to manage tasks
- There will not be a specific app for managing tasks, giving full flexibility to user experiences

Summary

- Working with tasks makes it easy to assign work to staff and allows mobile workers to clearly see which tasks are completed, in progress, or still need attention
- Easily integrates with your enterprise systems to enable automatic updates and support end-to-end workflows across Field Maps and other apps.
- Task capabilities allow organizations to create and edit tasks within ArcGIS Pro, Map Viewer, and Web Editor. Dispatching workflows can be built using Instant Apps and Experience Builder, while mobile workers can create and update tasks directly in Field Maps.
- Tasks can also be generated automatically using the ArcGIS Python API, Workflow Manager, or Power Automate.
- Task-enabled layers can be brought into Dashboards or other reporting tools to monitor progress.

Questions?