Tasks in Field Maps

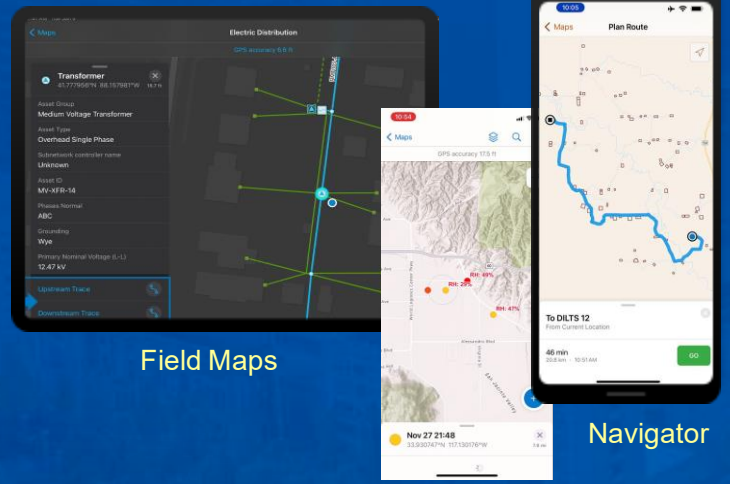
ArcGIS

Supports Teams in the Field

Mobile Data Collection
Enterprise Data Access

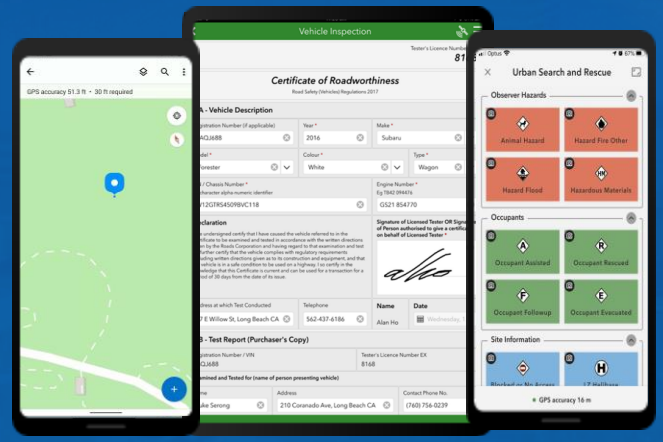
Situational Awareness

Synchronizing
Office & Field Activities



Field Maps

Navigator



Field Maps

Survey123

QuickCapture

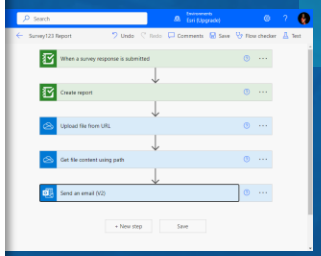
New & Improved

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

Plan, Optimize & Coordinate

Connected & Disconnected

Integration



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

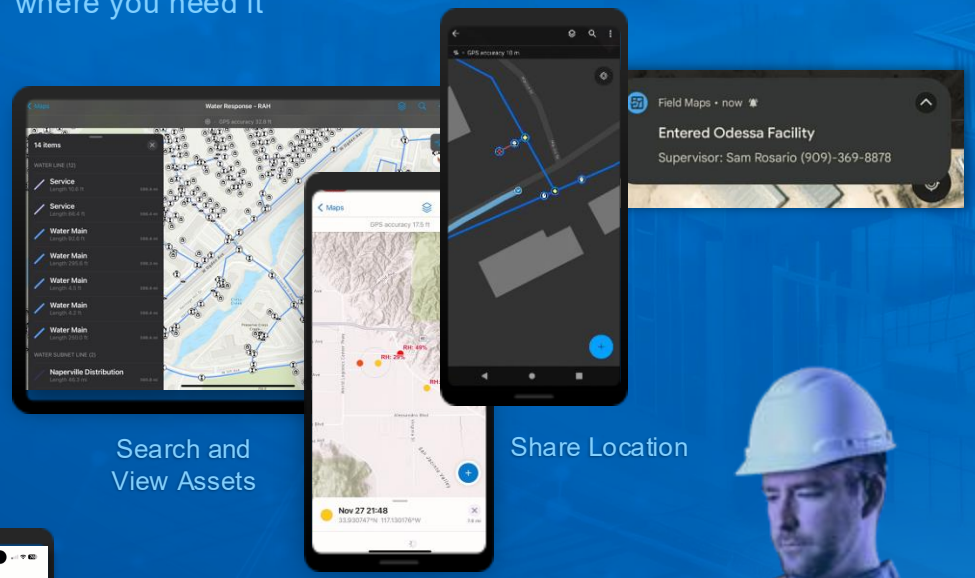
ArcGIS Field Maps

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

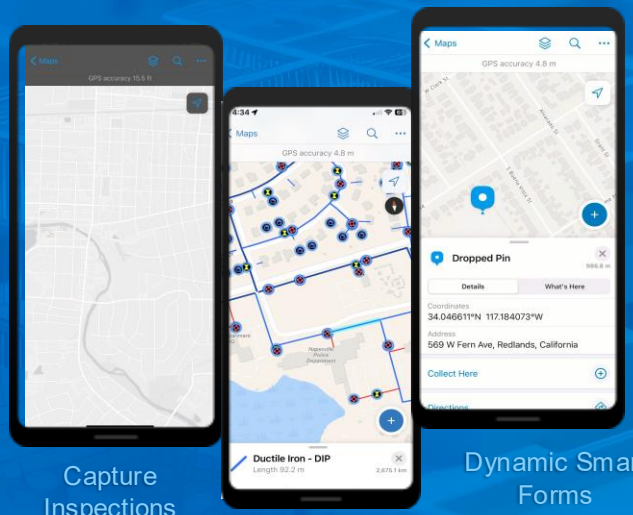


Search and View Assets

Share Location

Data Capture

Intuitive and powerful collection tools



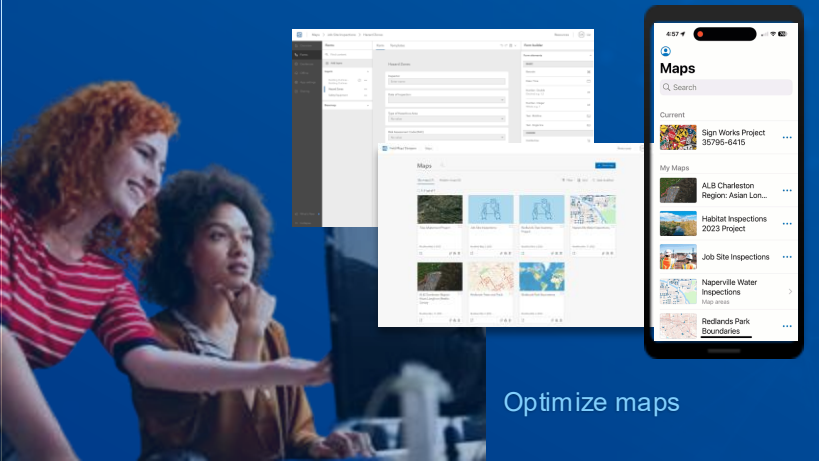
Capture Inspections

Capture with high accuracy

Dynamic Smart Forms

Plan & Coordinate

Design field workflows



Task coordination

Configure mobile experience

Optimize maps

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

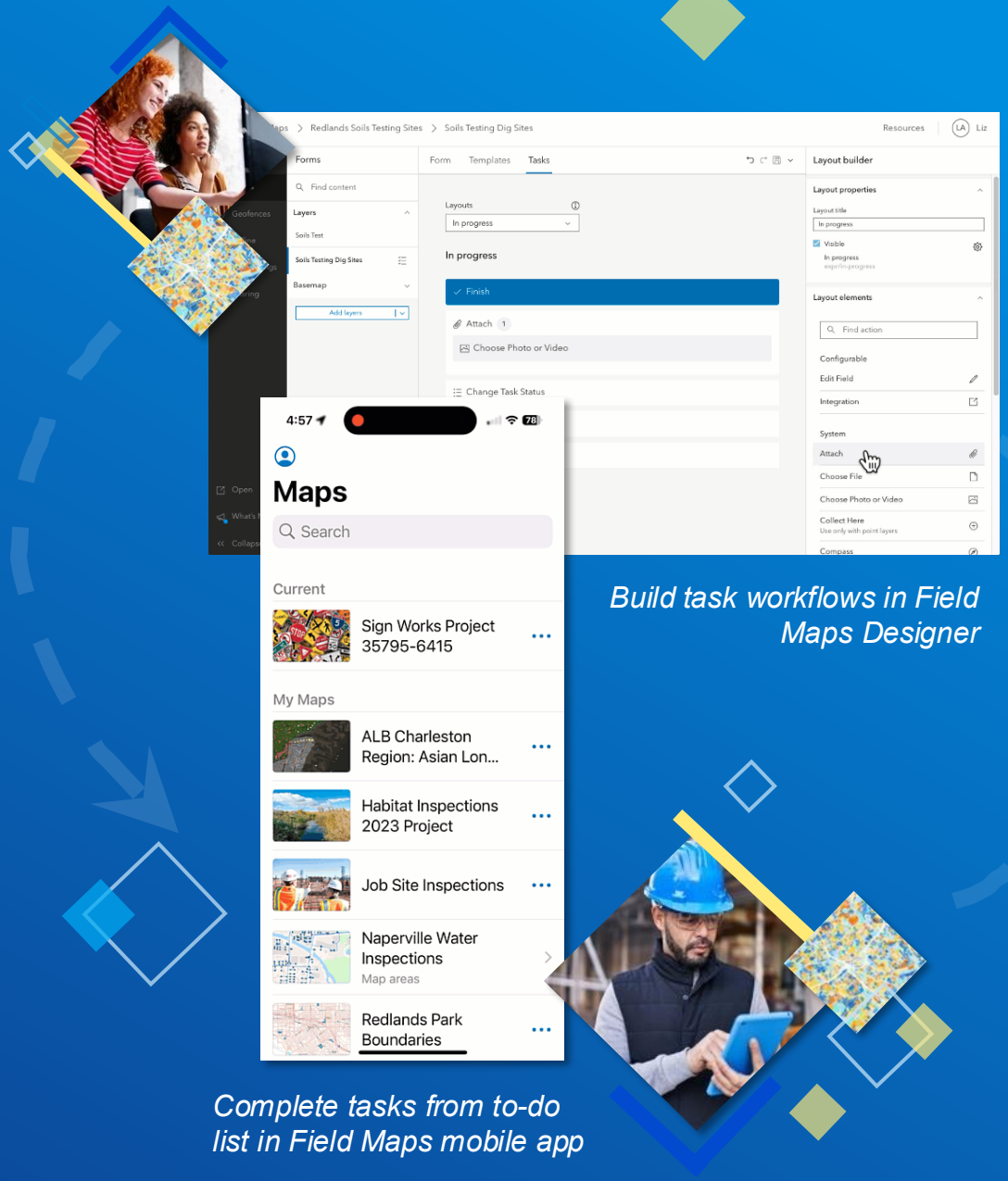
Introducing the Tasks capability

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



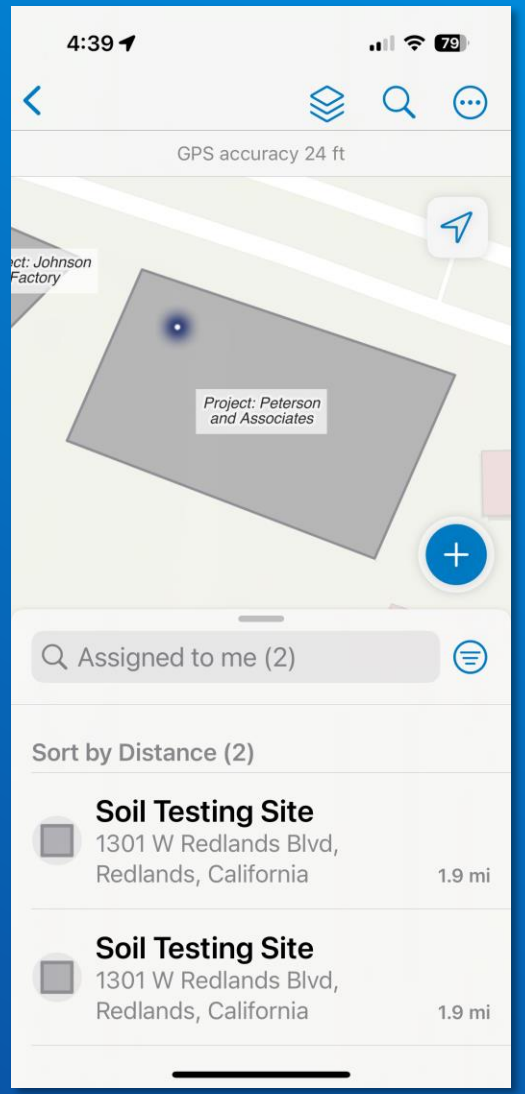
Build task workflows in Field Maps Designer

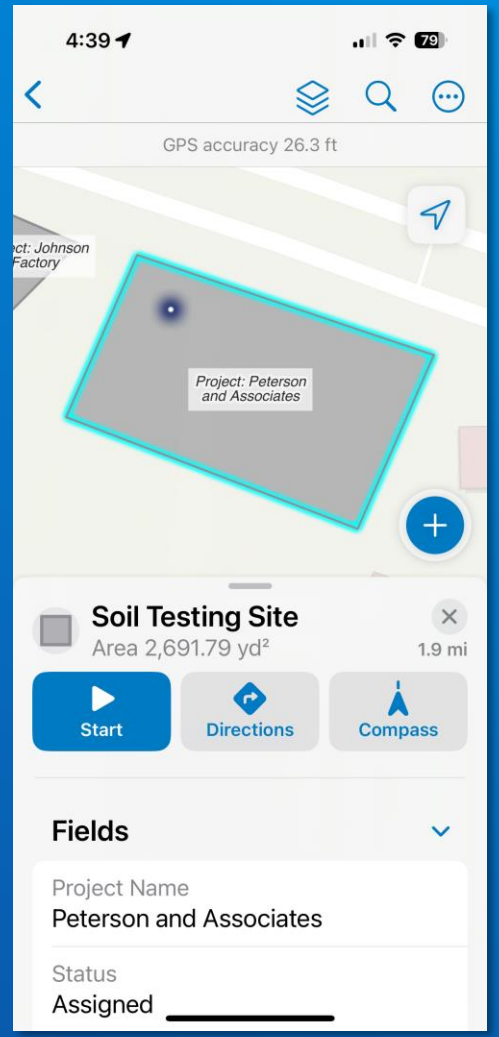
Complete tasks from to-do list in Field Maps mobile app

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

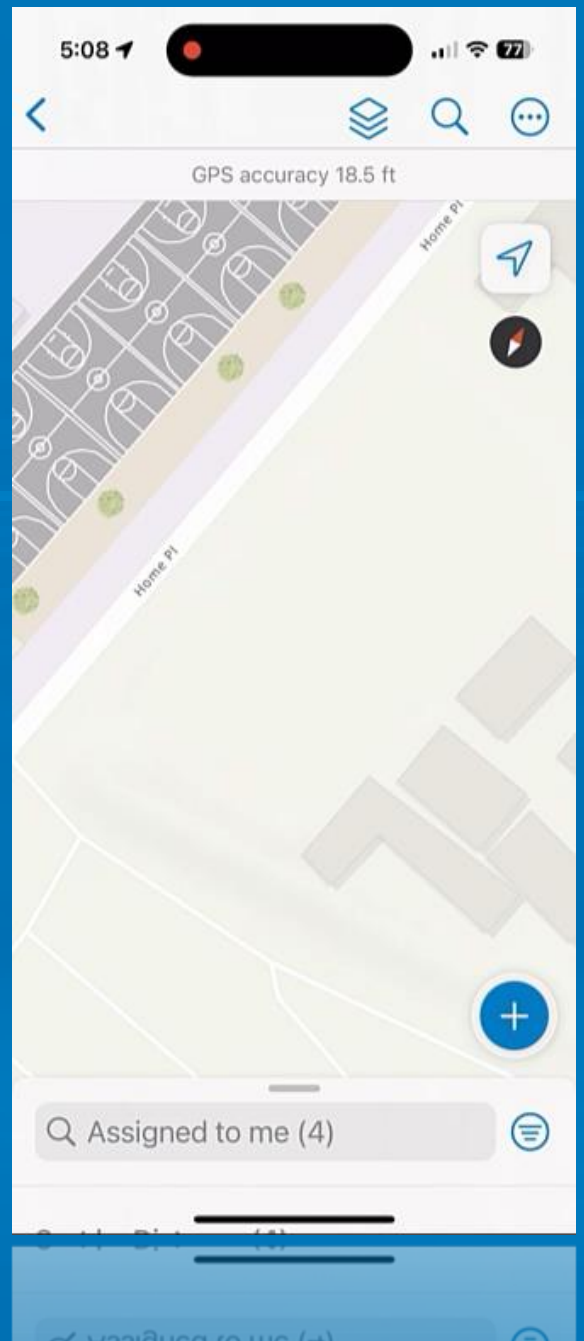




A task-enabled layer can be point, line, or polygon!

DEMO

Mobile worker creates a new task in the field



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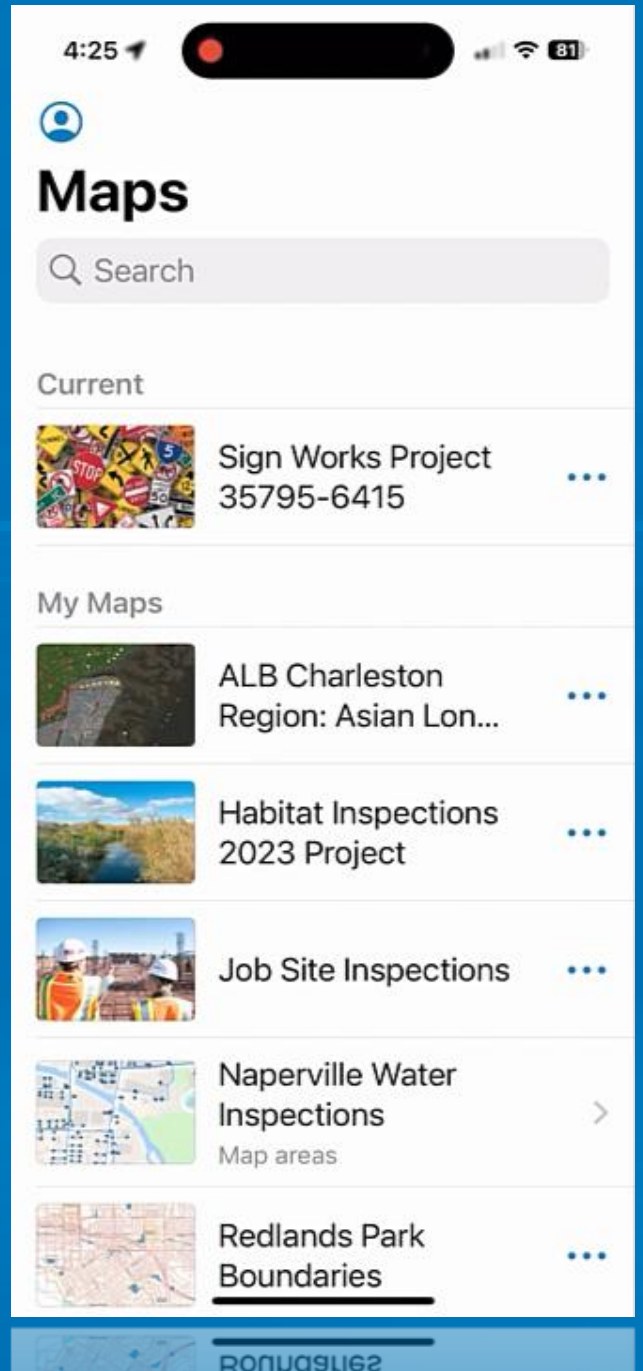
Mobile worker picks up unassigned task



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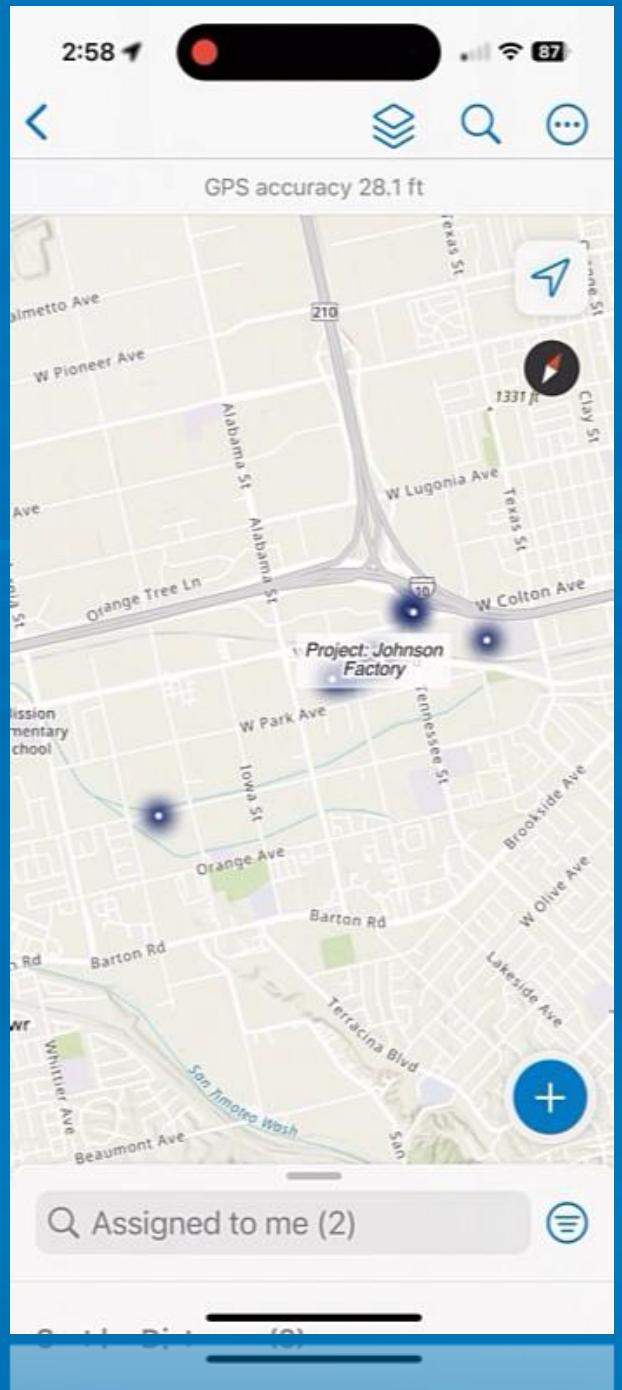
Mobile worker completes a task



Working with Tasks

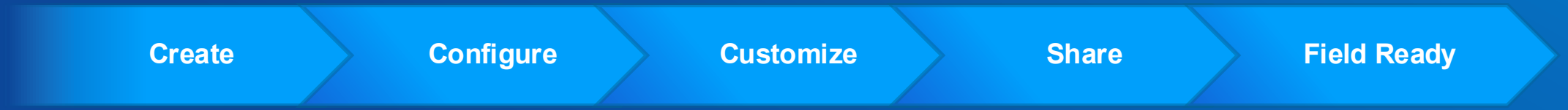
Defaults to get you started

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

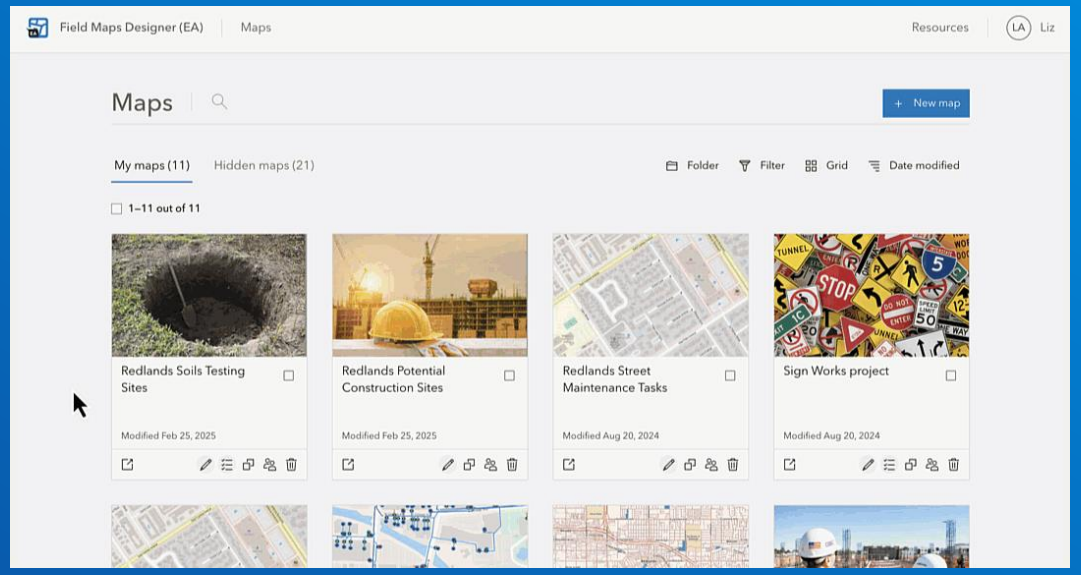
Getting started with task-enabled feature layers

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

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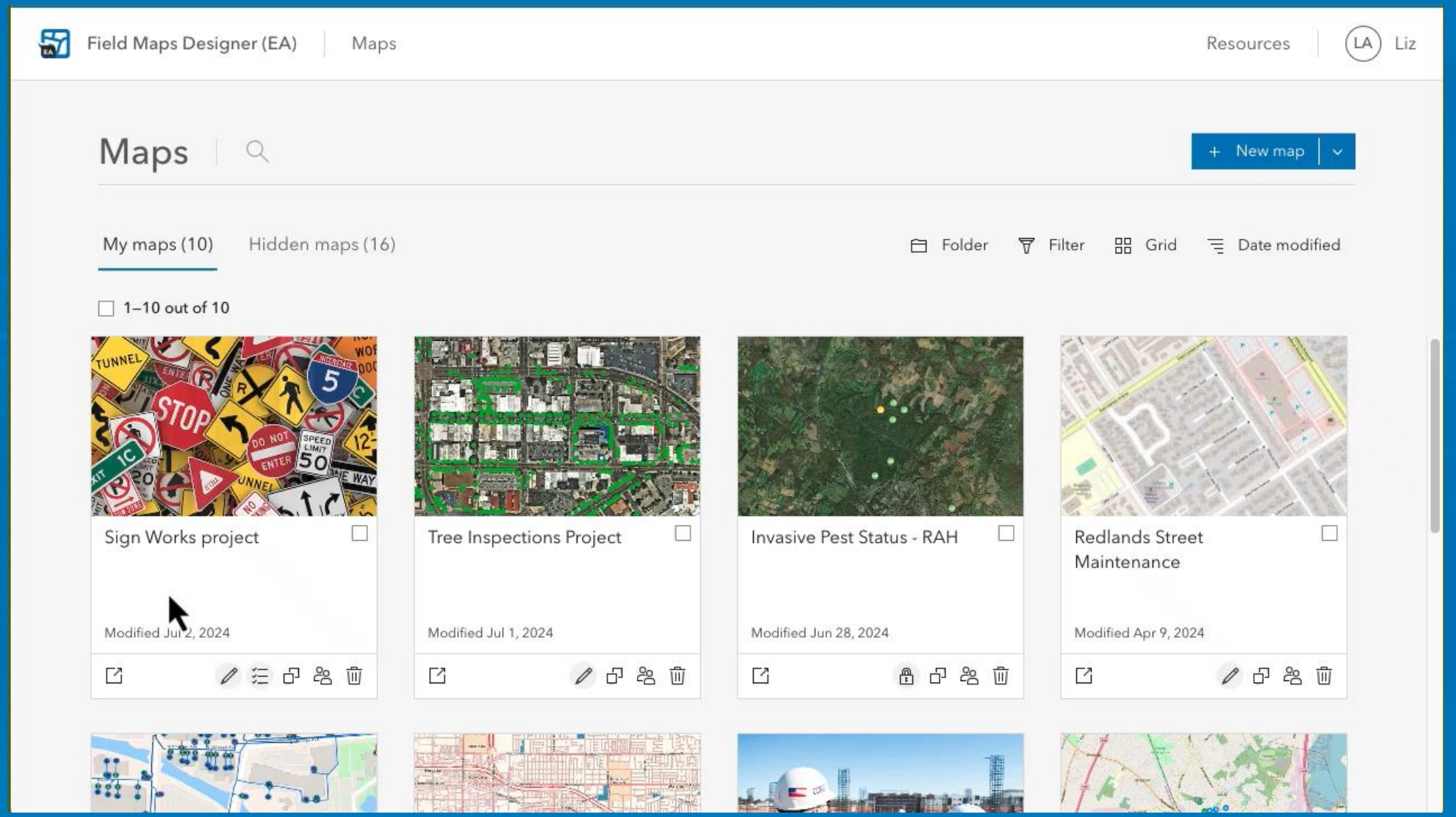
Map author creates a new task-enabled layer



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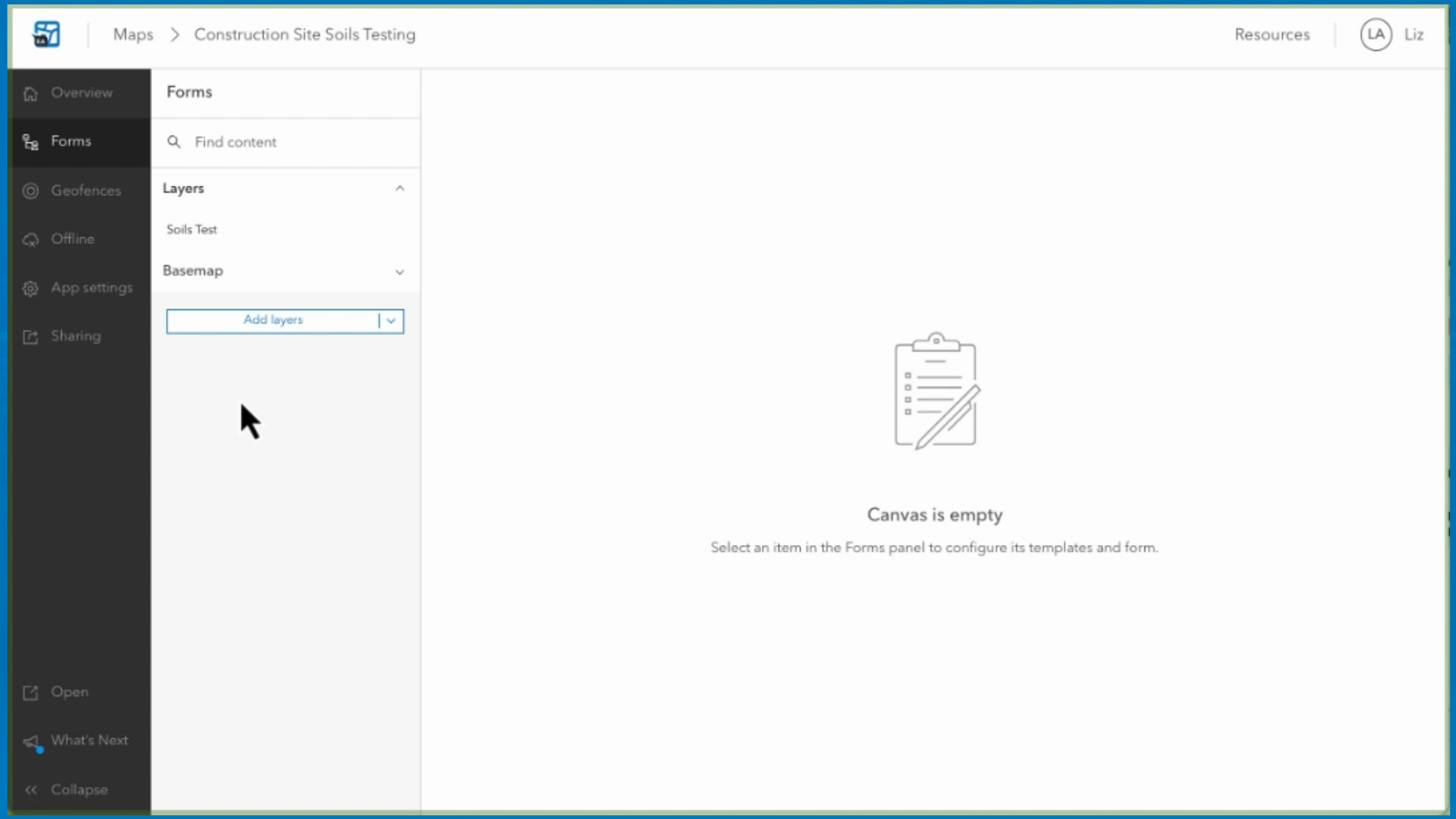
Map author enables an existing layer for tasks



Understanding the task-enabled layer

The task information model

Required fields drive the tasks capability

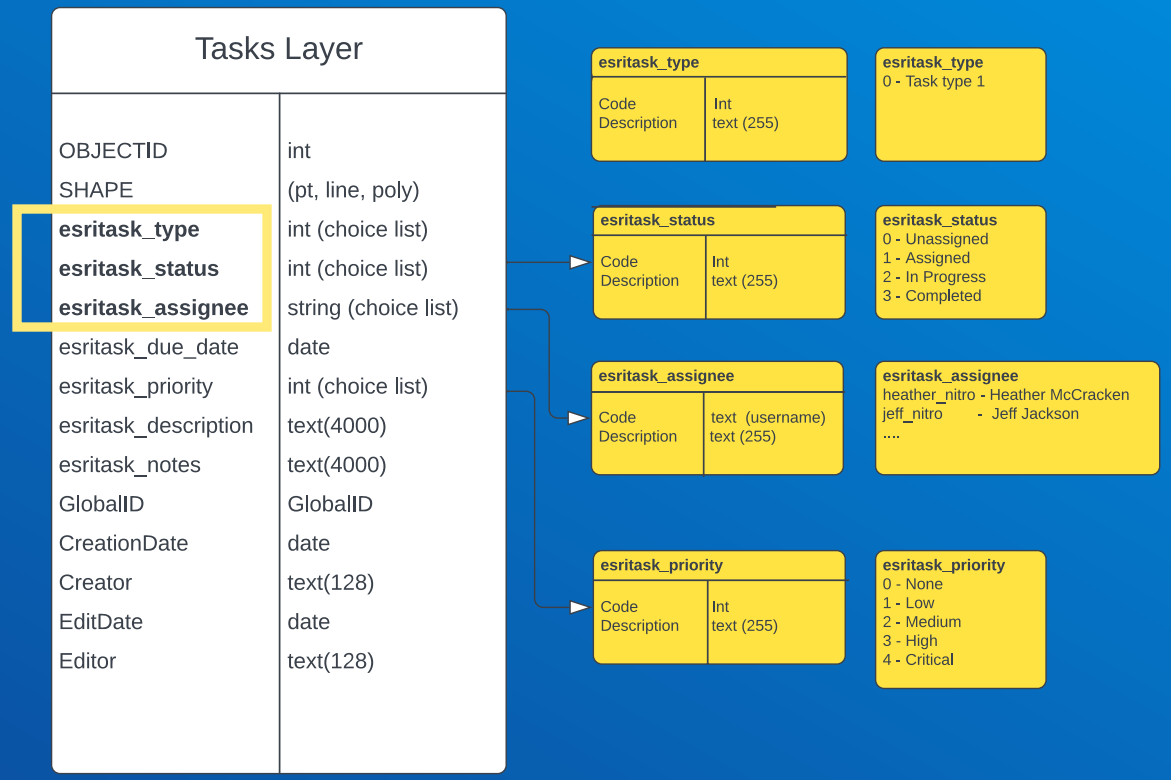
- Task type – Define types of work. You must configure at least one task type.
- Status – Use defaults provided or customize
- Assignee – Workers in your organization or partnered organizations. You must configure at least one worker.

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



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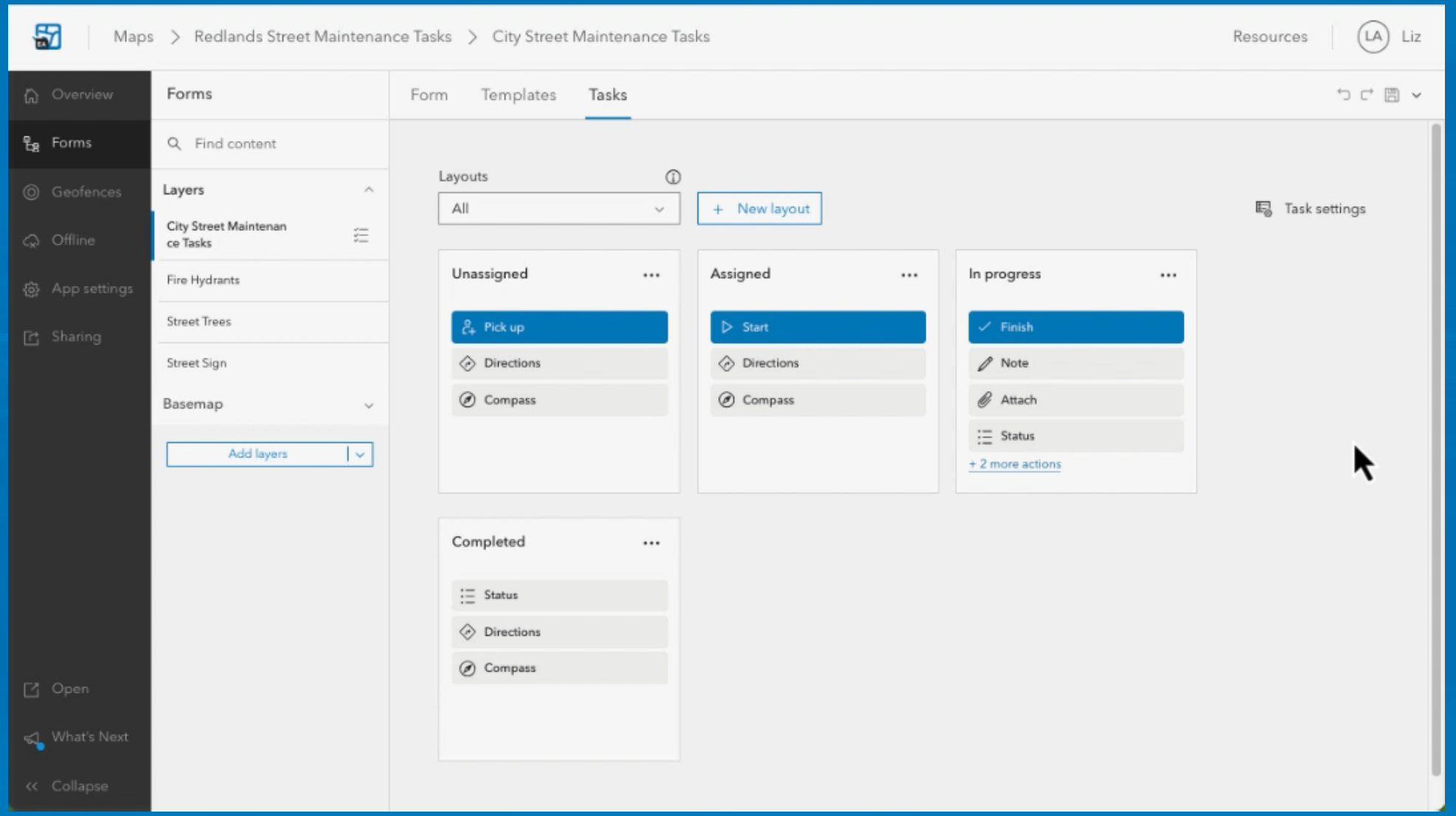
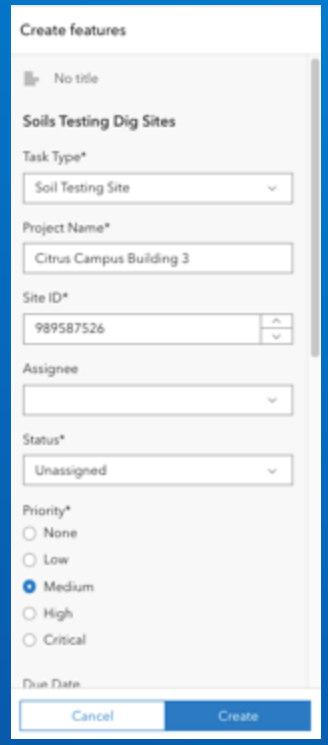
Map author configures required fields



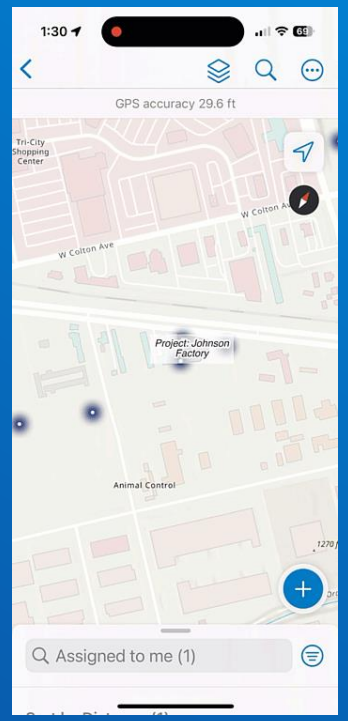
Configuring Tasks to your workflows

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

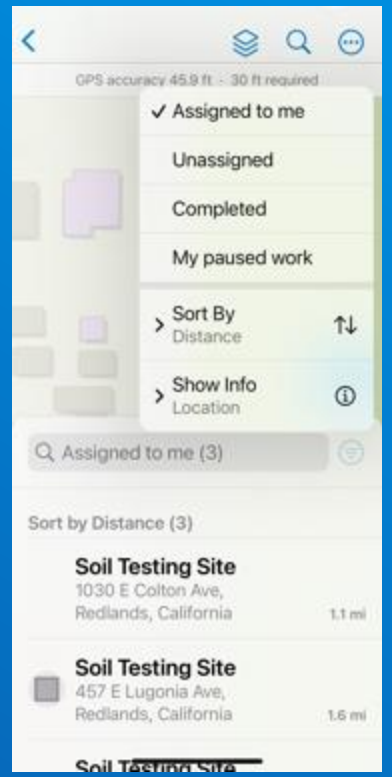


Create & edit tasks via the form



Context driven actions

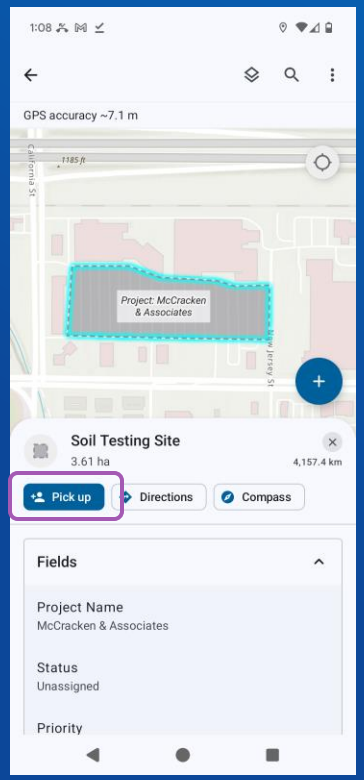
Task details shared in the pop-up



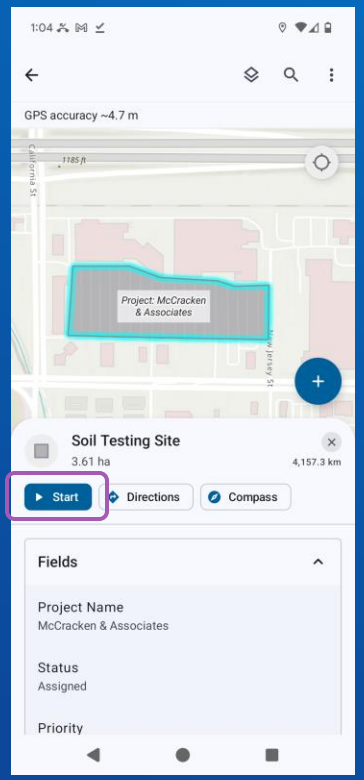
Task filters provide to-do lists

Tasks are context-driven

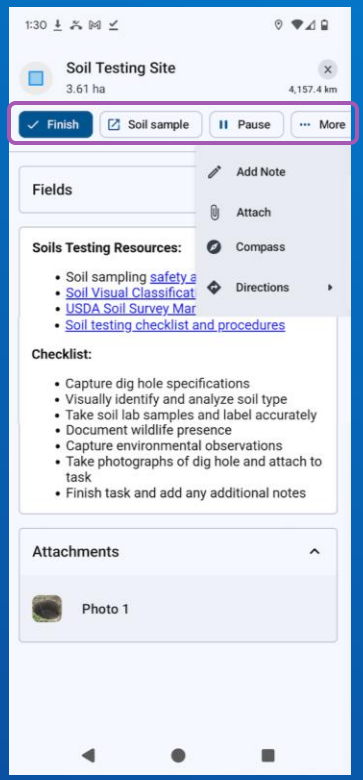
Guide mobile workers through each stage of work



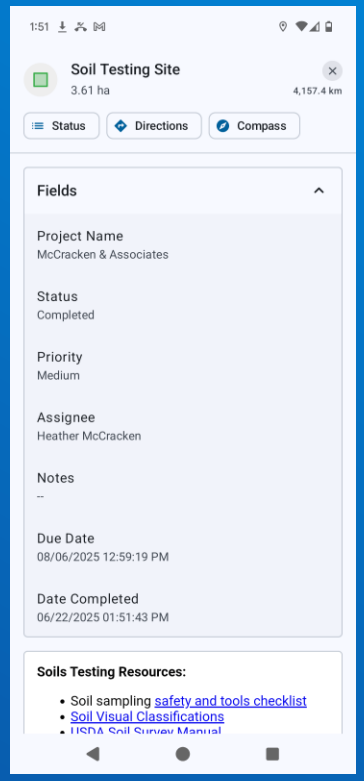
Unassigned



Assigned



In progress



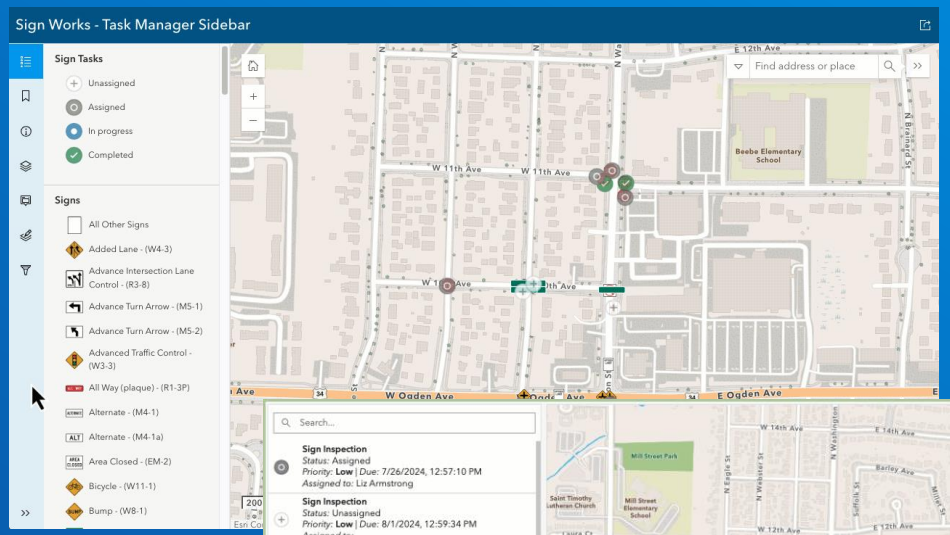
Completed

Example configurations

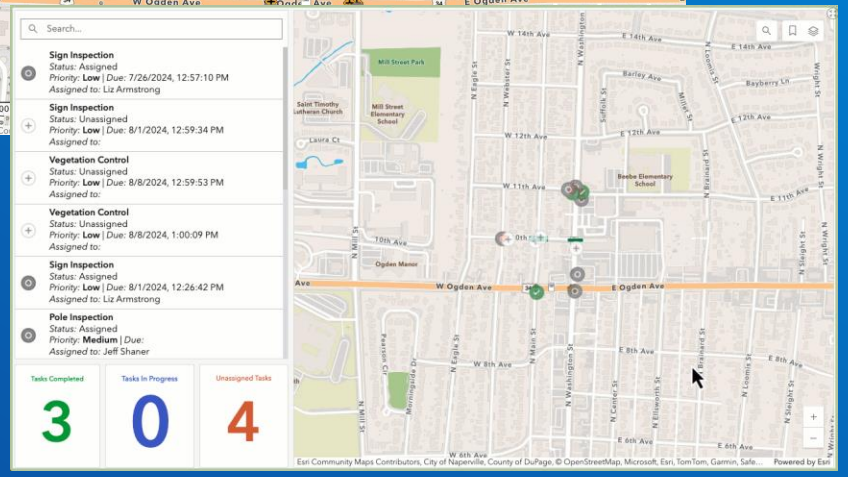
Managing & monitoring tasks

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

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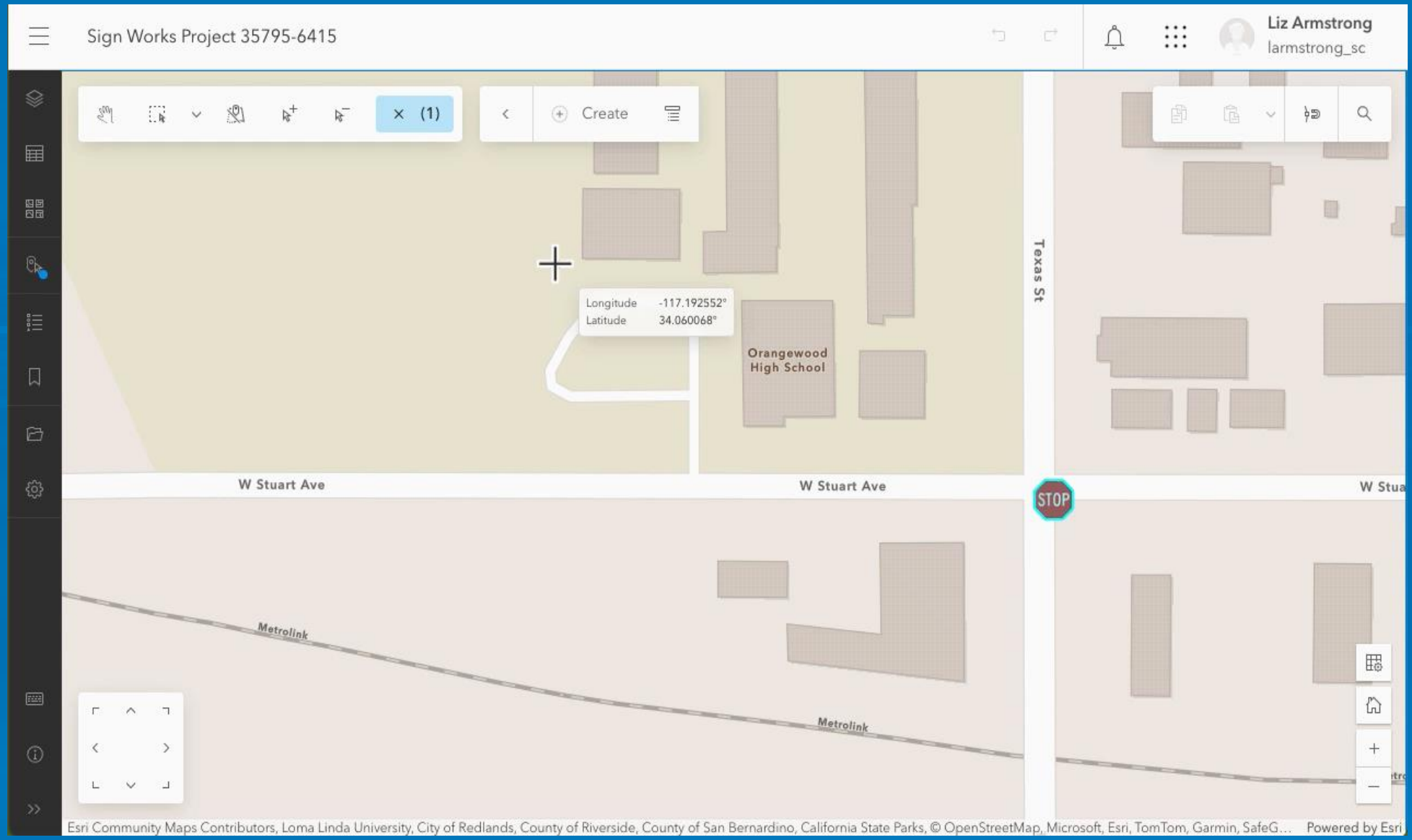
Using Web Editor to create and manage tasks

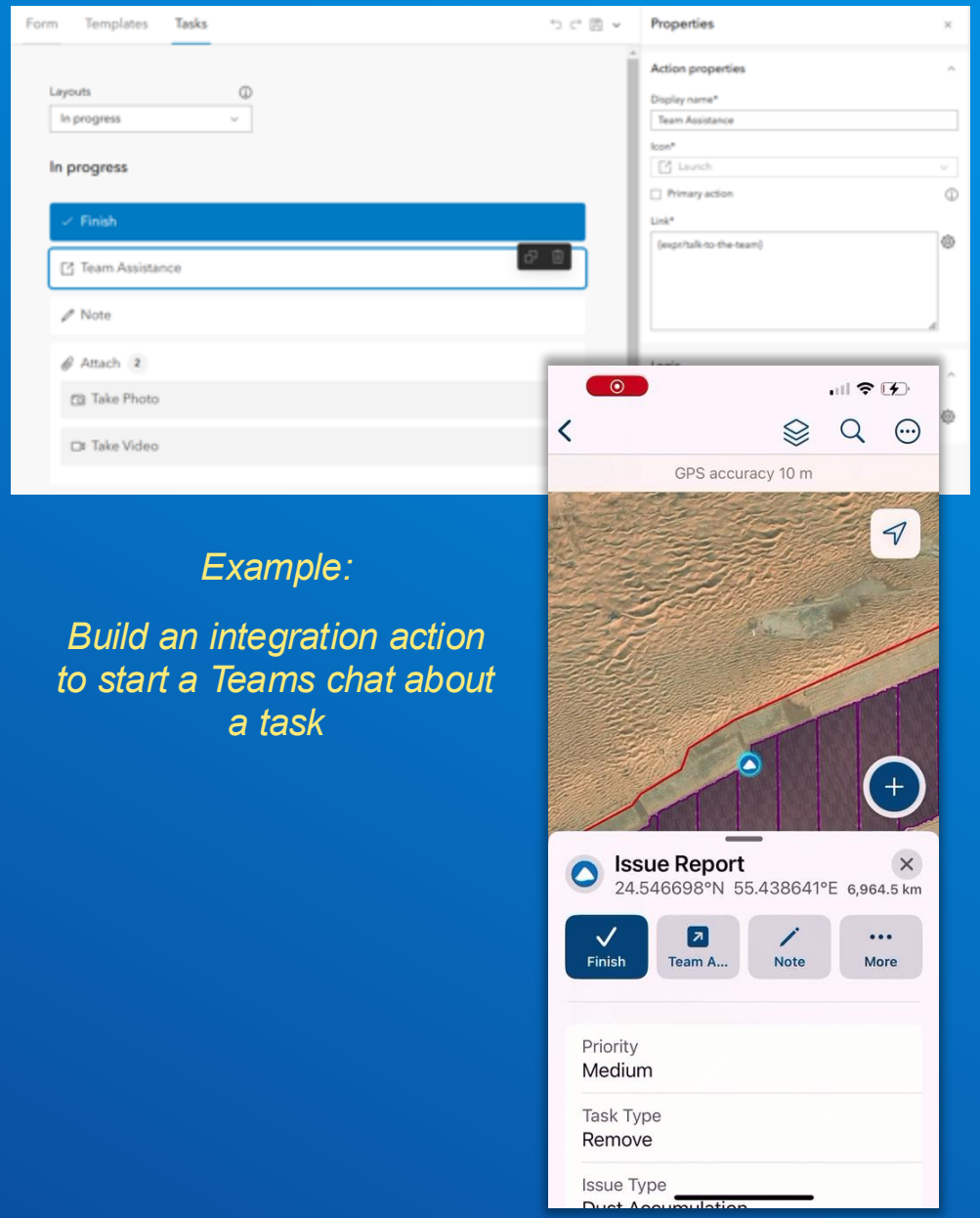


Integration with enterprise systems

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.

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Questions?