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# Migrate from ArcGIS Workforce to tasks in ArcGIS Field Maps

380 New York Street
Redlands, California 92373-8100 USA
909 793 2853
info@esri.com
esri.com

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# Migrate from ArcGIS Workforce to tasks in ArcGIS Field Maps

## Introduction to tasks in ArcGIS Field Maps

ArcGIS Field Maps now includes tasks, a capability designed to manage work assignments directly in the Field Maps mobile app and sync back to the system of record. With tasks, mobile workers can view and complete tasks in the same app where they have access to situational awareness and data collection tools, reducing the need for multiple apps and simplifying field workflows. In the office, dispatchers or project managers can create, assign, and report on work done in the field.

The tasks capability replaces the functionality previously provided by ArcGIS Workforce.

Although Workforce offered a straightforward dispatcher-to-worker model, its schema and workflows were fixed: field types could not be renamed or expanded, status values were limited, and it was not possible to apply custom business rules or create new task-specific actions.

The tasks capability, in contrast, offers a more flexible framework. Tasks provide an adaptable framework with configurable smart forms, business logic, layouts, actions, and more, which allows you to tailor workflows to operational needs. Now, with tasks in Field Maps, mobile workers no longer need to use a separate app to manage their work.

If your organization is new to tasks and not currently using Workforce, begin with the ArcGIS Field Maps: Introducing Tasks blog article and the tasks documentation to learn how to get started and configure tasks workflows to meet your operational needs.

If your organization is currently using Workforce, you can do one of the following to get started with the tasks capability:

- Design new workflows. Tasks can support richer workflows than were possible in Workforce. You may want to use this transition to reconfigure your workflows with the expanded tasks capabilities. This is the recommended path, especially if your existing Workforce projects were limited by its fixed schema. This allows you to enhance your fieldwork model instead of replicating the Workforce model.

- Recreate existing Workforce workflows. Your current workflows may be exactly what you need. You can closely recreate your existing Workforce

workflows with tasks and help your teams transition with minimal disruption. This is useful when you need to migrate quickly, keep a familiar model in place while planning longer-term improvements, or support users who prefer continuity. This guide is specifically written for organizations that are currently using Workforce who want to recreate existing workflows in tasks.

## Guide overview

This step-by-step guide helps you configure the tasks capabilities in Field Map Designer to align with the workflows you currently use in Workforce.

In this guide, you will learn how to do the following:

- Set up a task-enabled layer and configure its schema
- Adjust task layouts, actions, and filters
- Add additional Workforce fields and status values
- Configure the tasks experience in the mobile app
- Create a dispatching experience similar to Workforce
- Monitor work done in the field

In addition to the steps in this guide, for those that are familiar with Python, the provided Python scripts can automatically map Workforce projects layers into a task layer for use in Field Maps. The scripts combine the Workforce assignment and worker data into a single task layer, add the necessary tasks fields, and copy your existing assignments into the new schema. If you're comfortable running Python, this can be an efficient way to accelerate your migration.

The following workflows can make the transition from Workforce to tasks in Field Maps as straightforward and smooth as possible.

## Create a new map with a task-enabled layer

To set up tasks that align with your ArcGIS workflows, you will first create a new map and add a task-enabled layer:

1. Open Field Maps Designer, click the **New Map** button, and select the **Start with new layers** option.
2. Add one or multiple feature layers to the service and name them. Click **Next** when done.
3. Enable the toggle button next to the **Will tasks be created and assigned to mobile workers?** setting, and select the layer you want to configure.
   **Note:** Tasks can only be enabled on one geometry layer per map and cannot be enabled on tables.
4. Enable any other layer settings as desired, and click **Next** when done.
5. Title the map and the feature service and click **Done**.

Field Maps Designer will create your new map and the task-enabled layer with the default configuration, which includes a schema, task actions and layouts, and preconfigured filters, as described below.

The layer has a schema containing the following default or placeholder values:

| Field name | Alias | Type | Required | Nullable | Values |
|---|---|---|---|---|---|
| esritask_type | Task Type | integer (Choice list) | Yes | Yes | 0 - Task Type 1 (placeholder) |
| esritask_assignee | Assignee | string (255) (Choice list) | Yes | Yes | assignee_username - Assignee name (placeholder) |
| esritask_status | Status | integer (Choice list) | Yes | Yes | 0 - Unassigned<br>1 - Assigned<br>2 - In Progress<br>3 - Completed |
| esritask_priority | Priority | integer (Choice list) | | Yes | 0 - None<br>1 - Low<br>2 - Medium<br>3 - High<br>4 - Critical |
| esritask_duedate | Due Date | date | | Yes | |
| esritask_description | Description | string(4000) | | Yes | |
| esritask_notes | Notes | string(4000) | | Yes | |

The set of task actions and layouts includes the following status values and preconfigured actions:

| Layout | Actions |
|---|---|
| Unassigned | Pick up, Directions, Compass |
| Assigned | Start, Directions, Compass |
| In progress | Finish, Note, Attach (Choose File, Choose Photo or Video, Record Audio, Take Photo, Take Video), Status, Directions, Compass |
| Completed | Status, Directions, Compass |

Three preconfigured task list filters are defined using standard SQL 92-based definition expressions:

- **Assigned to me**—A to-do list with tasks assigned to the individual user:
  *esritask_assignee = 'CURRENT_USER' AND NOT(esritask_status = 3)*
- **Unassigned**—A to-do list displaying unassigned tasks that users can pick up and work on:
  *esritask_status = 0*
- **Completed**—A to-do list displaying the work completed by the individual user:
  *esritask_assignee = 'CURRENT_USER' AND esritask_status = 3*

Next, you will edit the schema and configuration to resemble the Workforce workflow.

## Adjust the tasks layer schema

Now that you have a map that includes a task-enabled layer with the default configuration, the next step is to update the tasks layer schema so it aligns with the information captured in ArcGIS Workforce.

### *Existing corresponding fields*

Some Workforce fields correspond to default task fields. For example, workerid in Workforce and esritask_assignee in tasks both represent the assigned worker.

| Workforce field | Corresponding task field | Details |
|---|---|---|
| description | esritask_description | Information for the mobile worker about the task |
| status | esritask_status | The assignment's status, derived from the values in the associated domain |
| notes | esritask_notes | A field for additional notes related to the task, which could be used by either dispatch or the mobile worker |
| priority | esritask_priority | The priority of the task, derived from the values in the associated domain |

| | | |
|---|---|---|
| assignmenttype | esritask_type | The type of task, derived from the values in the associated domain |
| duedate | esritask_duedate | The date and time by which the task needs to be completed |
| workerid | esritask_assignee | The username of the mobile worker to whom the task is being assigned, derived from the values in the associated domain |
| CreationDate (editor tracking) | CreationDate (editor tracking) | The date of creation of the task feature, derived as part of Esri's built-in Editor Tracking capabilities |
| Creator (editor tracking) | Creator (editor tracking) | The username of the creator of the task feature, derived as part of Esri's built-in Editor Tracking capabilities |
| EditDate (editor tracking) | EditDate (editor tracking) | The last edited date of the task feature, derived as part of Esri's built-in Editor Tracking capabilities |
| Editor (editor tracking) | Editor (editor tracking) | The username of the last recorded editor of the task feature, derived as part of Esri's built-in Editor Tracking capabilities |

## *Use additional Workforce fields in tasks*

The Workforce schema includes several other fields used to track assignment progress, worker actions, and more. To replicate this behavior in tasks, you will add the following fields to your task layer and expand the list of status values.

Additional Workforce fields include the following:

- **workorderid**—ID generated by external business systems
- **location**—Optional text capturing an assignment location or address
- **declinedcomment**—Notes explaining why a worker declined an assignment
- **assigneddate**—Date and time when the assignment was marked Assigned
- **inprogressdate**—Date and time when the assignment started
- **completeddate**—Date and time when the assignment was finished
- **declineddate**—Date and time when the assignment was declined
- **pauseddate**—Date and time when the assignment was paused
- **dispatcherid**—ID of the dispatcher creating or updating the assignment

To use these additional fields in tasks, complete the following steps:

1. Open Field Maps Designer and click the **Tasks** layer.
2. Open the **Form** tab.
3. Add the following form elements to the form:

| Field | Form element type | Properties |
|---|---|---|
| workorderid | Text - single line | Display name: Work Order ID<br>Field name: workorderid<br>Max length: 255<br>Field length: 255 |
| location | Text - single line | Display name: Location<br>Field name: location<br>Max length: 255<br>Field length: 255 |
| declinedcomment | Text - single line | Display name: Declined Comment<br>Field name: declinedcomment<br>Max length: 255<br>Field length: 255 |
| assigneddate | Date and time | Display name: Assigned on Date<br>Field name: assigneddate |
| inprogressdate | Date and time | Display name: In Progress Date<br>Field name: inprogressdate |
| completeddate | Date and time | Display name: Completed on Date<br>Field name: completeddate |
| declineddate | Date and time | Display name: Declined on Date<br>Field name: declineddate |
| pauseddate | Date and time | Display name: Paused on Date<br>Field name: pauseddate |
| dispatcherid | Text - single line | Display name: Dispatcher ID<br>Field name: dispatcherid<br>Max length: 255<br>Field length: 255 |

4. Save the form.

### *Add more status values*

The Workforce schema includes three additional assignment states that are not included by default in the tasks capability: **Declined**, **Paused**, and **Canceled**. Next, you will configure these values in the existing status field.

To add Workforce Status values, complete the following steps:

1. Return to the **Tasks** tab.
2. Open the **Tasks settings** panel.
3. Click the edit button next to **Status**.
4. Add three additional value options to the field list and enter the following labels and codes:
    a. Label: Declined, Code: 4
    b. Label: Paused, Code: 5
    c. Label: Canceled, Code 6
5. Click **Done** to save these values to the field's domain.

**Note:** See Set up final configurations to learn how to configure your symbology to align with these status values.

## Configure the layouts and actions

Now that you've updated the schema, you can configure task layouts and actions so mobile workers can interact with tasks in a way that closely matches the Workforce app experience.

Task layouts control which actions mobile workers see at each stage of a task. You will update these layouts and actions to ensure a familiar experience for mobile workers.

Workforce provided the following actions based on assignment status:

** denotes primary action*

| Workforce status | Workforce actions |
|---|---|
| Assigned | Start*, Finish, Decline, Navigate, Compass |
| In progress | Finish*, Pause, Finish, Decline, Reset, Take photo, Attach, Add Note, Navigate to Assignment, Compass |

| | |
|---|---|
| Paused | Resume*, Finish, Decline, Reset, Navigate to Assignment, Compass |
| Completed | Reset, Navigate to Assignment, Compass |

**Note:** There is also an Open in Field Maps action in Workforce. This action is not needed since you are already using Field Maps.

To recreate Workforce layouts and actions in Field Maps, in this section you will do the following:

- Update the **Assigned** layout
- Update the **In Progress** layout
- Create a **Paused** layout
- Optionally, remove the **Unassigned** layout

## *Update the Assigned layout*

The **Assigned** layout contains actions workers can use when they first receive a task. In Workforce, workers could start work, decline, or navigate. To align tasks in Field Maps with this behavior, complete the following steps:

1. Return to the **Tasks** tab.
2. Click the **Assigned** layout to open the layout canvas.

First, you will adjust the **Start** action so it also captures the task start time in the inprogressdate field.

3. Click the **Start** action.
4. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button.
   This allows you to pick another field that can be triggered to automatically update when the mobile worker taps the **Start** button.
5. Enter the following properties:
   a. For **Field**, type inprogressdate.
   b. For **Calculated expression**, create a new expression called **Return current date and time** with the Arcade expression **Now()** .

Next, you will add the **Finish** action, which sets the status to **Completed** and also captures the task end time in the completeddate field.

6. Close the **Action properties** panel from the prior action to return to the **Actions** library.
7. Drag an **Edit Field** action into the layout and position it under the existing **Start** action.

8. In the **Action properties** panel, type Finish as the display name.
9. For the **Icon** property, select the **Check** icon.
10. Under the **Field updates** section, select **Automatic** as the update type.
11. Enter the following properties for the first automatic calculation:
    **a.** For **Field**, type esritask_status.
    b. For **Calculated expression**, select the existing **Status = 'Completed'** expression.
    This expression already exists in the default configuration.
12. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button to add another field that can be triggered to automatically update.
13. Enter the following properties:
    a. For **Field**, type completeddate.
    b. For **Calculated expression**, select the **Return current date and time** expression you previously created.

Next, you will add the **Decline** action, which sets the status to **Declined**, capture a note in the declinedcomment field, and capture the decline date and time in the declineddate field.

14. Drag an **Edit Field** action into the layout and position it under the **Finish** action you just created.
15. In the **Action properties** panel, type Decline as the display name.
16. For the **Icon** property, select the **Close** icon.
17. Under the **Field updates** section, select **Manual and automatic** as the update type.
18. For the **Manual update** field, select **declinedcomment**.
19. Enter the following properties for the first automatic calculation:
    a. For **Field**, type esritask_status.
    b. For **Calculated expression**, create a new expression called **Status = 'Declined'** with the Arcade expression **4** .
20. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button to add another field that can be triggered to automatically update.
21. Enter the following properties:
    a. For **Field**, type declineddate.
    b. For **Calculated expression**, select the **Return current date and time** expression you previously created.
22. Save all changes.

The **Assigned** layout now has the following actions:

- Start
- Finish
- Decline
- Directions
- Compass

## *Update the In Progress layout*

The **In Progress** layout supports actions workers can use after beginning a task. Workforce allowed workers to pause, finish, decline, or attach photos. To configure this layout in Field Maps, complete the following steps:

1. Browse to the **In progress** layout.
2. Click the **Finish** action.
   You can adjust this action so it also captures the task end time in the completeddate field. This is the same as the **Finish** action in the **Assigned** layout.
3. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button to add another field that can be triggered to automatically update.
4. Enter the following properties:
   a. For **Field**, type completeddate.
   b. For **Calculated expression**, select the **Return current date and time** expression you previously created.

Next, you will add the **Pause** action, which will set the status to **Paused**, and capture the paused date and time in the pauseddate field.

5. Drag an **Edit Field** action into the layout and position it under the **Finish** action.
6. In the **Action properties** panel, type Pause as the display name.
7. For the **Icon** property, select the **Pause** icon.
8. Under the **Field updates** section, select **Automatic** as the update type.
9. Enter the following properties for the first automatic calculation:
   a. For **Field**, type esritask_status.
   b. For **Calculated expression**, create a new expression called **Status = 'Paused'** with the Arcade expression **5** .
10. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button.
11. Enter the following properties:
    a. For **Field**, type pauseddate.
    b. For **Calculated expression**, select the **Return current date and time** expression you previously created.

Next, you will add the **Decline** action. This is similar to how you added it to the **Assigned** layout.

12. Drag an **Edit Field** action into the layout and position it under the **Pause** action you just created.
13. In the **Action properties** panel, type Decline as the display name.
14. For the **Icon** property, select the **Close** icon.
15. Under the **Field updates** section, select **Manual and automatic** as the update type.
16. For the **Manual update** field, select **declinedcomment**.
17. Enter the following properties for the first automatic calculation:
    a. For **Field**, type esritask_status.
    b. For **Calculated expression**, select the **Status = 'Declined'** expression you previously created.
18. In the **Action properties** panel, under the **Automatic update** section, click the **Automatic update** button.
19. Enter the following properties:
    a. For **Field**, type declineddate.
    b. For **Calculated expression**, select the **Return current date and time** expression you previously created.

Next, you will add the **Reset** action, which resets the task status to **Assigned**, and remove any dates captured in the inprogressdate and pauseddate fields.

20. Drag an **Edit Field** action into the layout and position it under the **Decline** action you just created.
21. In the **Action properties** panel, type Reset as the display name.
22. For the **Icon** property, select the **Recent** icon.
23. Under the **Field updates** section, select **Automatic** as the update type.
24. Enter the following properties for the first automatic calculation:
    a. For **Field**, type esritask_status.
    b. For **Calculated expression**, select the **Status = 'Assigned'** expression.
    This expression already exists in the default configuration.
25. In the **Action properties** panel, under the **Automatic update** section, select the **Automatic update** button to add another field that can be triggered to automatically update.
26. Enter the following properties:
    a. For **Field**, type inprogressdate.
    b. For **Calculated expression**, create a new expression called **Clear field** with the Arcade expression **null** .
27. In the **Action properties** panel, under the **Automatic update** section, select the **Automatic update** button to add another field that can be triggered to automatically update.
28. Enter the following properties:
    a. For **Field**, type pauseddate.

b. For **Calculated expression**, select the **Clear field** expression you just created.

Next, you will remove unnecessary actions and organize the remaining actions to mimic the Workforce button layout as closely as possible.

29. Drag a **Menu** action under the **Finish** action. Type Other Status as the display name.
30. Drag the **Pause**, **Decline**, and **Reset** actions into the **Other Status** menu group.
31. Drag the **Attach** group to position it below the **Other Status** menu group.
32. Within the **Attach** group, reorganize the actions in the following order: **Take photo**, **Choose Photo or Video**, **Take Video**.
33. Delete the **Choose File** and **Record Audio** action.
34. Remove the **Status** action from the remaining actions.
35. Optionally, drag a **Divider** action into the canvas, positioning it between the **Note** and **Directions** actions.
36. Save changes.

## *Create a Paused layout*

Workforce included a Paused state, and you can create a matching layout in tasks in Field Maps. Mobile workers can resume, finish, or decline from this state.

1. Use the layout drop-down menu to browse to the **All layouts** page.
2. Click the Options button in the top right corner of the **In progress** layout and select **Duplicate**.
   This will duplicate the layout and all actions within it.
3. Select the **Copy of In progress** layout to view the layout canvas.
4. In the layout properties panel, retitle the layout Paused.
5. For the layout visibility expression, create a new expression called **Paused** with the Arcade condition **esritask_status is Paused**. Use the following Arcade expression to do this: **DomainName($feature, "esritask_status") == "Paused"**.
6. Click **Done** to complete the process.
   The layout expression now shows **Paused** as the selected expression.
7. Delete the following actions: **Copy of Pause**, the entire **Copy of Attach** group, **Copy of Note**, and the divider before **Directions**.
8. Delete the **Copy of** automatically generated prefix from the display name properties of the remaining actions.
9. Click the **Finish** action, drag it into the **Other Status** group, position it at the top of the group, and uncheck the **Primary action** property in the **Action properties** panel.

Next, add the **Resume** action, which sets the status to **In progress**.

10. Drag an **Edit Field** action into the layout and position it at the top of the layout (above the **Other Status** group).
11. In the **Action properties** panel, type Resume as the display name.
12. For the **Icon** property, select the **Play** icon.
13. Check the **Primary action** check box.
14. Under the **Field updates** section, select **Automatic** as the update type.
15. Enter the following properties for the first automatic calculation:
    a. For **Field**, type esritask_status.
    b. For **Calculated expression**, select the **Status = 'In progress'** expression.
16. Save all changes.

## *Remove the Unassigned layout (optional)*

Workforce did not allow mobile workers to pick up unassigned work, so you may choose to remove this layout from tasks. To do so, browse to the **All layouts** page, click the overflow menu for the **Unassigned** layout, and click **Remove**. Then save all changes.

## Configure the task list filters

Now that you have configured the task layouts and actions to match your Workforce workflows, the next step is to update the task list filters.

Task list filters control which tasks mobile workers see in Field Maps. Each task filter you create will present a set of tasks that are defined by your criteria and are displayed together in a to-do list in Field Maps. For example, the **Assigned to Me** task list filter displays all of the outstanding tasks that are assigned to the user.

In Workforce, mobile workers relied on two task views:

- To do—Displays **Assigned**, **In progress**, and **Paused** assignments
- Completed—Displays **Completed** assignments

The default task configuration comes with three task list filters, allowing mobile workers to see their assigned tasks, completed tasks, and unassigned tasks. To match the Workforce workflows, you will configure the default task filters below.

## *Adjust the Assigned to me task filter*

To adjust the **Assigned to me** task filter, complete the following steps:

1. Open the **Tasks settings** panel.
2. Select the **Filter** button next to the **Assigned to me** filter.
3. Rename the filter To do.
4. Update the definition expression to show **Assigned**, **In progress**, and **Paused** assignments as follows: **esritask_assignee = 'CURRENT_USER' AND esritask_status NOT IN (3, 4, 6)** .
5. Click **Done** to apply the changes.

### *Remove the Unassigned task filter (Optional)*

Workforce did not allow mobile workers to pick up unassigned work, so removing the **Unassigned** filter provides a similar experience.

1. Click the **Options** button next to the **Unassigned** filter.
2. Click **Remove**.
3. Save the changes.

### *Review the Completed filter*

Similar to Workforce, the **Completed** filter in Field Maps shows tasks completed by the current user.

Verify that the definition expression used in the **Completed** filter is:

```
esritask_status = 3 AND esritask_assignee = 'CURRENT_USER'
```

Now that your task list filters are updated, mobile workers can view their tasks in a familiar Workforce-style workflow.

## Set up final configurations

This section guides you through setting up any existing integrations you have, configuring access and sharing your map, and setting up location sharing.

So far you have done the following:

- Enabled tasks on a layer in the map, ensuring mobile workers see a list of assigned tasks
- Updated the task layer's schema to add the missing fields used in assignment workflows in Workforce
- Updated the layouts, actions, and filters in the task configuration to more closely resemble the Workforce schema

Now, you are ready to put the final touches on your project. Next, add your task types and assignees. A task type is a category that defines what kinds of work the project contains. Assignees are users who can be assigned work in the project.

## Add task types

To add task types, complete the following steps:

1. Open the **Tasks settings** panel.
2. Click the **Edit** button next to **Type**.
3. Remove the existing placeholder value and add as many task types as you need.
4. Click **Done** to save these values to the field's domain.

## Add assignees

To add assignees, complete the following steps:

1. Open the **Tasks settings** panel.
2. Click the **Edit** button next to **Assignees**.
3. Remove the existing **Assignee name** placeholder value.
4. Do one of the following to manually add your assignees:
    a. Click the **Add** button to add a value, ensuring the **Label** text is the user's full name and the **Code** text is the user's username.
    b. Click the **Select from organization** button to search for and select users in your organization. You can select a predefined list of users by using groups. Users already added to the field list will be unavailable.
5. Click **Done** to save these values to the field's domain.

## Configure status symbology

In the Adjust the tasks layer schema section, you added additional task status values to match Workforce (**Declined**, **Paused**, and **Canceled**). To visually distinguish these status values on the map and align them with the Workforce experience, you can update the task layer's symbology in Map Viewer.

You can use the provided set of downloadable status symbology icons, illustrated in the table below to visually align the status values with the Workforce experience. This allows you to maintain familiar symbology when migrating to tasks in Field Maps. These icons are optional. If preferred, you can upload and use your own custom icons to match your organization's workflow needs.

| Status (& alt text) | Code | Icon |
|---|---|---|
| Declined | 4 | |
| Paused | 5 | |
| Canceled | 6 | |

To configure your symbology, complete the following steps:

1. Open your map in Map Viewer from Field Maps Designer by clicking **Open** and selecting **Map Viewer**.
2. Ensure the tasks layer is selected. On the **Settings** toolbar, click **Styles** to open the **Styles** panel.
3. Under **Step 2: Pick a style**, click **Style options** under **Types (unique symbols)**.
4. Add the status values:
    a. In the **Status** table, find the additional status values you added earlier (**Declined**, **Paused**, **Canceled**) under **Other**.
    b. Select all three new status values.
    c. In the pop-up menu, click **Move to group**.
    d. Choose the group with the default status values (titled **Untitled group** if you haven't named the group).
    Your new status values appear in the same group as the default status values.
5. Change the symbols for the new status values:
    a. For each of the new status values, click the **Default symbol** button.
    b. In the **Symbol style** panel, click **Current symbol**, and click the **Category** drop-down menu.
    c. Scroll to the bottom of the menu and select **Uploaded symbols**.
    d. Click **Browse** and upload the corresponding .svg icon file.
    e. Click **Done**.
6. Configure the symbol appearance for each new status to match the other status values by making the following adjustments:
    a. Set **Size** to **16**.
    b. Set **Rotation** to **0**.
    Your symbols for each status now match the Workforce status symbols.
7. Save the map.
8. Close Map Viewer to return to Field Maps Designer.

To learn more about working with symbology, see Use style options.

## *Add integrations*

Integrations allow mobile workers to launch other apps or web resources directly from a task. This helps streamline workflows—whether you're navigating to a location, filling out a form, or viewing reference information.
In Workforce, the Workforce project owner had the option to add integrations that would allow other ArcGIS apps (such as ArcGIS Navigator, ArcGIS Survey123, and so on) to be opened directly from an assignment. Integrations could be applied to either certain assignment types or to all assignments in a project.

The Tasks capability in Field Maps allows deeper, more flexible integrations through URLs, app links, and Arcade-driven logic. Map authors can create a link that opens any third-party app or webpage using a URL or app link. They can also use Arcade to control when the link appears, just like other action types. For more advanced workflows, the link itself can be generated dynamically with an Arcade expression.

- In Workforce, integrations could be applied to all assignment types or to specific types.
- In tasks, this is accomplished using visibility expressions on integration actions.

To add an integration action to your layout in tasks, complete the following steps:

1. In the layout canvas under the **Tasks** tab in Field Maps Designer, double-click **Integration** (or drag it into the desired position).
2. In the **Action properties** panel, do the following:
    a. Type **Display name** text for the link.
    b. Optionally, enable the **Primary action** setting if the link is the primary action of the layout.
3. Under **Link**, add the desired URL or app link.
    a. Optionally, to create a dynamic link, tap the **Settings** button to open the Arcade editor and create or select an Arcade expression.
4. Under the **Logic** section, choose whether the action will be visible.
    a. Optionally, to make the **Integration** action conditionally visible, tap the **Settings** button to open the Arcade editor. Select an existing expression or create a new one and apply it to the action.

**Note:** Conditional visibility allows you to show the integration link only for specific task types (similar to selecting a specific assignment type for an integration in Workforce).

#### Arcade example: Conditional visibility

To only display the integration action when the task type is "Inspection", apply the following Arcade expression:

```
DomainName($feature, "esritask_type") == "Inspection"
```

**URL examples**

The following are URL examples of common integration patterns:

- ArcGIS Field Maps—Open a map and center to specific coordinates

  ```
  https://fieldmaps.arcgis.app?referenceContext=center&itemID=3ac4145c1ac44aea86e9ed42e00fbb0d&center=34.0547155,-117.1961714
  ```

- ArcGIS Field Maps—Initiate capture at the mobile worker's location

  ```
  https://fieldmaps.arcgis.app?referenceContext=addFeature&itemID=3ac4145c1ac44aea86e9ed42e00fbb0d&featureSourceURL=https://services9.arcgis.com/QjGvjfQhsHAmqfjP/arcgis/rest/services/DamageAssessment_Apr2018_631d0895e7d3404bb78e8e04e92d896e/FeatureServer/1
  ```

- ArcGIS Navigator—Download and open a map

  ```
  https://navigator.arcgis.app?itemID=54b927a0eeab413a885c647d1fa393da
  ```

- ArcGIS Navigator—Opening ArcGIS Navigator to a particular route

  ```
  https://navigator.arcgis.app?routeItemID=3ac4145c1ac44aea86e9ed42e00fbb0d
  ```

- ArcGIS Survey123—Open a survey

  ```
  https://survey123.arcgis.app?itemID=36ff9e8c13e042a58cfce4ad87f55d19
  ```

For more information about creating URL schemes for ArcGIS apps, see the following:

- ArcGIS Field Maps: Deploy your map
- ArcGIS Navigator: Open Navigator from a link
- ArcGIS Survey123: Launch the field app
- ArcGIS QuickCapture: Integrate with other apps

## *Set access and sharing*

In Workforce, mobile workers did not have the ability to create new assignments in the field. By default, the tasks capability in Field Maps allows mobile workers who have editing privileges on the task layer to create tasks in the field. If you want to maintain the same model your organization used in Workforce, in which only

dispatchers or office staff can create tasks, you can achieve this with a view layer in a new map created just for mobile workers.

### Limit task creation

To prevent mobile workers from creating tasks, complete the following steps:

1. Open the web map containing the tasks layer in Field Maps Designer.
2. Go to the **Tasks** tab and click **Task settings.**
3. Scroll down in the **Task settings** pane to view the **Task access** panel and click **Create view layer**.
4. Click **Next** twice (unless you want to further configure your scenario).

   Note: In this workflow, you can also set filters and choose which fields are included in the view.
5. Type a name and details for your view layer, and click **Create**.

   The **Tasks settings** pane appears and your new view layer is listed.
6. Use the **Overflow** menu next to your new view layer to select **View item details**.
   This opens a new tab in the browser and opens the view layer's item details page.
7. Click the **Settings** tab and scroll down to the **Feature layer** section.
8. Enable **Editing** under **Editing options.**
9. Disable **Add** under **Editing capabilities**.
10. Save your changes.
11. Return to Field Maps Designer and the **Task access** panel.
12. Open the **Overflow** menu next to your new view layer and select **Use in duplicated map**.

    Note: You are creating a new map for your mobile workers. You can keep the original map for those who need to create and manage tasks.
13. In the window that appears, name your new duplicate map, and click **Done**.
14. From the notification at the bottom of the screen, click **Open map** to confirm that your new map has been created and contains your new tasks view layer.

For more information, see ArcGIS Field Maps: Prevent workers from creating tasks in the field.

Now that you have created a view layer from the original tasks layer and added it to a new map, you can share the map with the mobile workers who need to access this map in the field to complete their tasks.

### Share the map

To share the mobile worker map, complete the following steps:

1. Go to the main **Maps** page in Field Maps Designer.
2. Find the new map you just created for mobile workers and click it to open it.
3. Open the **Sharing** tab in Field Maps Designer.
4. Click the **Set sharing level** button.
5. Share the map with your organization or the specific group of users who need access.

   Note: You must give access to the mobile workers you previously added as assignees.

6. Click **Save**.

**Note:** If you want to enable mobile workers to create tasks in the field, share your original map with the tasks layer to your organization or the group of mobile workers.

### Location sharing and viewing tracks (Optional)

In Workforce, supervisors and dispatchers, as well as mobile workers in the field, could see where each individual team member was in the field, – helping to inform operational decisions. In Field Maps, this same functionality is supported through the location sharing capability.

Organizations can use the location sharing capability to view mobile worker locations in the field as they complete their tasks in the following ways:

1. Mobile workers can voluntarily enable location sharing, either from the **My Tracks** card on the **Browse** screen or from the GPS details bar after opening the map.

2. Map authors can require that the mobile worker enables location sharing in order to open a map, either by enabling the **Location Sharing** app setting in Field Maps Designer or by configuring the map with geofences.

When mobile workers share their location through Field Maps, they can be visualized by creating track view layers in Track Viewer. You can define which mobile workers are included and who has permission to see their data for each track view, giving authorized viewers access to both historical tracks and current locations.

### Monitor worker locations from the office

To allow stakeholders in the office to view where mobile workers are while they are completing their tasks, you can create a track view layer, share it with designated associates, and add it into a viewing experience (such as a map, a dashboard, or an app for dispatching).

Complete the following steps:

1. Enable location sharing for your organization (if not already enabled).
2. Create a track view and specify which mobile workers should be included.
3. Share the track view with the group responsible for monitoring field activity.
4. Add the track view to a web map or use it directly in the Track Viewer app.
5. Provide the map or Track Viewer link to supervisors.

See the resources at the end of this section for more detailed step-by-step instructions and documentation.

**Monitor peer locations from the field**

To enable mobile workers to view where their team is, enabling increased coordination while completing tasks in the field, you can add a track view layer to the map with the tasks view layer you created earlier for your mobile workforce.

Complete the following steps:

1. Create a track view containing the mobile workers whose tracks should be visible to one another.
2. Share the track view with the same mobile worker group that has access to the mobile map.
3. Add the track view layer to the map with the tasks view layer that will be used in the Field Maps mobile app.

Mobile workers will now be able to view their coworkers' last known locations and historical tracks, based on permissions and update frequency.

For more detailed information on how to configure and use location sharing and track views in Field Maps, see the following:

- Enable location sharing
- Share location
- Create track views
- Deploy a Location Sharing Solution with ArcGIS Field Maps
- ArcGIS Location Sharing Privacy Best Practices

## Create a dispatching experience

ArcGIS Workforce included a dedicated dispatcher application for creating assignments, assigning work, and monitoring progress. Tasks in ArcGIS Field Maps does not include a separate dispatcher app. Instead, organizations can configure a dispatching experience using ArcGIS web apps and tools.

With tasks, you can manage and assign work in several ways:

- Edit tasks directly in **Map Viewer**, **ArcGIS Pro**, or **Web Editor**.
- Configure a dispatching interface using app builders such as **Experience Builder** or **Instant Apps**.
- Automate workflows using webhooks or scripts.

The Instant Apps **Manager** template provides a configurable, no-code option for creating a dispatching interface. It allows dispatchers to create, view, and manage tasks in a single app.

In this section, you will create a dispatching experience using the Instant Apps Manager template.

You can use any web map that contains the task layer. In the following steps, use your original map with the task-enabled layer.

To create a dispatching experience with the Manager template, complete the following steps:

1. Open **Instant Apps** from the app switcher in ArcGIS Online or ArcGIS Enterprise.
2. On the **Create** tab, locate the **Manager** template and click **Choose**.
3. In the **Create app** panel, provide a name and optionally choose a folder, then click **Create app**.
4. In the **Express configuration** panel, click **Step 1**.
5. Click **Add new map**, then click **Browse for maps**.
6. Search for and select your map that contains the task layer, then click **Select Map**. Note: If you created separate maps for dispatchers and mobile workers, select the dispatcher map.
7. Ensure the following settings are enabled so dispatchers can create and update tasks:
    a. Edit in table
    b. Geometry edits
    c. Create new features
8. Click **Done**, then click **Next**.
9. Configure the **App title**, **Header**, and **Legend** as needed, then click **Next**.
10. Select the tools that will be available to dispatchers, then click **Next**.
11. Configure the theme and layout.

    a. Ensure the **App layout** is set to **Split view** to align with the Workforce dispatching interface, providing a table and map view.
12. Click **Publish**.
13. Set the sharing level for the app and share it with dispatchers.
14. Click **Close** or **Launch** the app to review it.

**Note**: This Instant Apps Manager template provides a similar dispatching experience but does not re-create the exact same dispatching experience that Workforce had.

## Monitor tasks

Organizations often pair Workforce with ArcGIS Dashboards or other ArcGIS apps to monitor work progress in the field, understand workloads, and know where mobile workers are, driving informed operational decision making. The same pattern applies when using the tasks capability in Field Maps.

You can create monitoring views that use your tasks data to help office staff understand what is happening in the field at any given moment. For example, you may want to know how many tasks are outstanding, which tasks have been completed, how workloads are distributed across teams, or how long certain task types typically take to finish. Monitoring also often includes awareness of mobile worker locations, enabling decisions such as determining which worker is closest to an urgent issue.

One of the most effective ways to create an operational view in ArcGIS is by using ArcGIS Dashboards. Dashboards can incorporate any web map that contains your task-enabled layer and, if desired, a track view layer. This allows you to present up-to-date information in charts, lists, and maps tailored to your project needs.

To create a monitoring dashboard, complete the following steps:

1. Open ArcGIS Dashboards and create a new dashboard.
2. Add the web map that contains your task-enabled layer as a data source, and optionally, add a track view layer if location awareness is required.
3. Configure elements such as the following, as desired:
    - Indicators can be used to show the number of Assignees, or tasks in various statuses (In Progress, Paused, and Completed)
    - Lists or tables can summarize tasks by type, priority, or assignee
    - Charts can show task trends or durations
    - A map element can display task locations and, if included, worker locations
4. Arrange and format the dashboard to highlight the information most relevant to your operations.
5. Share the dashboard with the group responsible for monitoring field activity.

Dashboards are highly customizable. To learn more about how to configure each dashboard component, see ArcGIS Dashboards resources.

## Enterprise deployment considerations

Organizations using ArcGIS Enterprise have options for implementing the tasks capability in Field Maps, depending on their current deployment and operational needs. If your organization is using ArcGIS Enterprise 11.5 or later, you can start working with tasks in your Enterprise deployment.

If your organization is using an earlier version of ArcGIS Enterprise and unable to upgrade, distributed collaboration provides a supported and flexible path forward. Distributed collaboration allows ArcGIS Enterprise and ArcGIS Online to share layers, maps, and updates bidirectionally or through a copy-based workflow.

Through distributed collaboration, you can do the following:

- Keep authoritative data stored and maintained in ArcGIS Enterprise
- Use ArcGIS Online to host task-enabled maps and enable the Tasks capability
- Allow mobile workers to work in Field Maps using the ArcGIS Online map while syncing updates back to ArcGIS Enterprise

See the following resources to learn more about distributed collaboration:

- ArcGIS Enterprise Help: About distributed collaboration
- ArcGIS Online Help: Create a distributed collaboration
- Tutorial: Get started with distributed collaboration
- Video series: Getting started with distributed collaboration
- Blog article: Getting the most out of distributed collaboration in ArcGIS Enterprise

## About the Authors

**Piyali Kundu** is a Product Engineer on the Field Apps team, supporting ArcGIS Field Maps and ArcGIS Workforce. She specializes in tasks and work assignment workflows, location sharing and geotriggers, smart forms, and ArcGIS Arcade. Prior to joining the Field Maps team, she spent six years as a Solution Engineer focused on large enterprise and field workflow implementations, particularly in the New York City metropolitan area. She also brings deep GIS experience in environmental and wildlife management, conservation, and sustainability.

**Chris Dunn** is a Product Engineer on the Field Apps team, since 2018. In his role, he helps test and implement new features in ArcGIS Field maps and ArcGIS Navigator. He is especially interested in how Arcade can be used to create dynamic popups and tasks configurations that support complex workflows for field teams. He received a BS in Environmental Science from the University of Southern Maine and an MS in GIS from Pennsylvania State University.

**Heather McCracken** is a Product Engineering Lead at Esri on the Field Apps Development Team. She has worked across multiple development teams since joining Esri in 2003. She currently leads development of impactful capabilities, such as tasks, for ArcGIS Field Maps and ArcGIS Navigator, with a focus on improving field operations and team coordination.

**Liz Armstrong** is a Product Manager on the Field Apps team, primarily supporting ArcGIS Field Maps. With a background spanning enterprise software delivery, business analysis, and user experience design research, she focuses on understanding customer needs, gathering feedback, and helping inform product prioritization, particularly around work coordination and task management for field teams. She is passionate about solving problems and making products that delight customers and users.

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## Contact Esri


380 New York Street
Redlands, California 92373-8100 USA

1 800 447 9778
T 909 793 2853
F 909 793 5953
info@esri.com
esri.com

Offices worldwide
esri.com/locations