



ArcGIS Workflow Manager Setup and Job Management

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Dubai (UAE)



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Introduction to ArcGIS Workflow Manager: Setup and Job Management is a 5-day foundation course for mapping teams starting to track their repeatable tasks in one place. You set up the repository, system tables and security model, create and run work items, and map your business processes as simple step sequences. You leave with a Starter Setup Workbook, and this foundation course is delivered by Mercury Training Center.

About This Course

Mapping teams often track edits, reviews and requests in spreadsheets and email, so nobody sees what is waiting or who holds it. To follow, you should already edit maps or attribute records in a desktop mapping application. You practice on a training site, setting it up from empty and running sample requests through it.

Who It Is For

- Team leads who decide how editing and review tasks move between staff.
- Editors and technicians who carry out map updates and record changes each day.
- Quality reviewers who check and approve submitted edits.
- System support staff who will look after the first installation and user roles.
- Records and permitting staff who handle requests that need a map update.

This course is not for administrators planning a large multi-server rollout with automation, who will gain more from an advanced or extended course on that subject, nor for readers new to digital mapping, who are better served by a desktop mapping basics course first.

Competencies You Will Build

- Initial Setup: you create the repository, system tables and basic settings on a new site.
- Access Control: you assign roles, groups and privileges so each person sees the right tasks.
- Task Handling: you create, assign, pause and close work items and keep their status current.
- Process Mapping: you turn a written procedure into a clear sequence of steps.
- Viewer Publishing: you share task views and web viewers with office and field colleagues.

What You Will Be Able to Do

By the end of the course you will be able to:

- From an empty training site, create the repository and system tables and confirm they work.
- Given a team list, set up the security model with roles and privileges for each member.
- Using ArcGIS Pro or ArcMap, create a work item, move it through its steps and update its status.
- From a written approval procedure, draw the matching step sequence in the web designer.
- Given a finished setup, publish the services and a web viewer that staff can open.

Course Content

Day 1: What the Extension Does

- Core Capabilities for Tracking Repeatable Mapping and Non-Mapping Tasks
- Submission and Approval Sequences for Map Change Requests
- Permitting, Data Submission and Data Request Examples
- Support for Versioned Editing by Several Editors
- Overview of Links With Utility Network, Parcel Fabric and Linear Referencing

Day 2: Architecture and First Setup

- Component Architecture and Fit With an Existing ArcGIS Site
- Planning Considerations Before Installing on a Server
- Repository and System Tables Created on a Training Site
- Configuration Steps and License Types Explained for Newcomers
- High-Availability Options and When a Small Team Can Skip Them

Day 3: Security and Daily Task Handling

- Security Model With Roles, Groups and Privileges for a Small Team
- Components of a Work Item: Properties, Notes, Attachments and Status
- Creating and Interacting With Work Items in ArcGIS Pro and ArcMap
- The Work Tab and Navigation Features in ArcGIS Pro
- Status Updates, Reassignment and Closing Completed Items

Day 4: Mapping Business Processes

- Common Process Patterns for Editing, Checking and Sign-Off
- How Step Order Controls the Sequence of Tasks
- Drawing Step Sequences in the Web Designer
- Hands-On Practice With the Web App for Requesters and Editors
- Publishing Services and Web Viewers for Office and Field Staff

Day 5: Running Your First Tracked Process in Practice

- Exercise: Repository and Roles Set Up for a Sample Team
- Exercise: Map Correction Request Drawn as a Step Sequence
- Exercise: Sample Requests Run From Creation to Closing
- Exercise: Web Viewer Shared With a Reviewer Group
- Starter Setup Workbook Completed for Your Own Team

Case Studies and Exercises

The following are suggested activities and may be adapted to the group.

- Case study: a city planning office tracking address change requests by email; you decide the steps and roles for the first tracked process.
- Case study: a water utility mapping team where edits wait unseen for review; you set statuses that show who holds each item.
- Exercise: a survey and mapping contractor receiving client map corrections; you draw the request-to-approval sequence.
- Exercise: a land registry team with new staff; you produce the role and privilege list for each person.

What You Take Back

You take back the Starter Setup Workbook, the record of how your site is set up and how your first process runs. In your first month back you use it to create the repository and roles on your own site and run your first real requests through a simple sequence.

- A setup checklist for the repository and system tables.
- A role and privilege list for your team.
- One process drawn as a step sequence with its statuses.
- A short user guide for creating and closing work items.

Quick Answers FAQ

What do I need before an introduction to ArcGIS Workflow Manager?

You need everyday experience editing maps or attribute records in ArcGIS Pro or ArcMap. No server administration or scripting background is needed; setup steps are shown from an empty training site.

How does an introduction to ArcGIS Workflow Manager differ from an advanced course on it?

An introduction covers first setup, security, daily task handling and simple step sequences. An advanced course assumes those are in place and moves on to automation, expressions, monitoring and large multi-server rollouts.



Why track mapping tasks in ArcGIS Workflow Manager instead of spreadsheets?

Tracked items show who holds each request, which step it has reached and what is waiting. Spreadsheets and email hide this, so edits stall and requesters cannot see progress.

What do I take back from an introduction to ArcGIS Workflow Manager?

You take back a Starter Setup Workbook with a setup checklist, a role list, one process drawn as a step sequence and a short user guide for your team.

For Your Manager

After this course, your team member can set up the repository and security model, create and track work items, draw a business process as a step sequence and share a web viewer. They return with a Starter Setup Workbook, first used to set up your site and run the team's first tracked requests.