MERCURY

Master ArcGIS Workflow Manager: Complete Course

13 – 24 September 2027
Rome (Italy)



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Master ArcGIS Workflow Manager: Complete Course is a 2-week course that takes a GIS team from first installation to an enterprise deployment with automated job tracking. In one sequence you configure the extension, design job templates and step diagrams, add Arcade logic and plan high availability. It suits GIS leads and administrators, and you take back a Job Tracking Rollout Plan, with delivery by Mercury Training Center.

About This Course

Many GIS teams buy the extension, then stall between a pilot and a production rollout because setup, job design and enterprise deployment are learned in pieces. To follow, you should already edit or publish GIS content in ArcGIS Pro. Across two weeks you build one sample deployment, adding a layer each day.

Who It Is For

- GIS leads who set the standard sequence for editing, review and approval in their team.
- GIS administrators who install, license and maintain ArcGIS Enterprise components.
- Production supervisors who assign jobs and watch progress across editors.
- Utility and land records specialists who run versioned editing on network or parcel datasets.
- Implementation consultants who configure job tracking for client teams.

This course is not for readers who have never used ArcGIS Pro, who will gain more from a desktop GIS foundations course first, nor for teams who only need to run existing jobs, who are better served by a short introductory course on job setup and daily use.

Competencies You Will Build

- Deployment Planning: you size, license and plan an enterprise installation, including high availability where it is justified.
- Job Template Design: you build templates with default and extended properties and automatic creation rules.
- Step Diagram Design: you model approval, permitting and editing sequences as clear step diagrams.
- Arcade Automation: you write expressions for parallel paths, output values and conditional routing.
- Production Monitoring: you build charts and queries that show bottlenecks and overdue jobs.
- Rollout Management: you move a configured setup from test to production and keep it maintained.

What You Will Be Able to Do

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

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- From an existing ArcGIS Enterprise layout, plan where the extension sits and what licenses it needs.
- Given a written approval procedure, convert it into a step diagram with the correct step types.
- Using job templates and extended properties, set up a job type that editors can open and complete.
- Given a sequence with optional branches, add Arcade expressions, scheduling and error handling.
- From a month of job history, build charts and shared queries that show where work waits.
- Using a deployment checklist, promote a tested configuration to production and plan its upkeep.

Course Content

Day 1: Capabilities and Use Cases

- Core Capabilities of the Extension for Repeatable GIS and Non-GIS Tasks
- Submission and Approval Sequences in Public Service Agencies
- Permitting, Data Submission and Data Request Use Cases
- Versioned Editing Support for Multi-Editor Teams
- Utility Network, Parcel Fabric and Linear Referencing Integration Overview

Day 2: Architecture and Enterprise Fit

- Component Architecture and How It Fits an Existing ArcGIS Enterprise Site
- Deployment Planning for Portal, Hosting and Federated Servers
- System Integration Checklist for Identity, Storage and Services
- Security Model Setup With Roles, Groups and Privileges
- Repository and System Tables Created for a Test Site

Day 3: Configuration and Licensing

- Step-by-Step Configuration of the Extension in ArcGIS Enterprise
- Licensing Requirements and User Types for Job Tracking
- High-Availability Options and When They Are Worth the Cost
- Publishing Services and Web Viewers for Field and Office Users
- Configuration Backup and Environment Documentation

Day 4: Jobs and Daily Use

- Job Components: Properties, Holds, Attachments and Comments
- Creating, Assigning and Closing Jobs in ArcGIS Pro and the Web App
- The Work Tab and Job Views for Editors in ArcGIS Pro
- Job Status Tracking for Supervisors Across Several Editors
- Common User Errors and How to Prevent Them in Daily Operation

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Day 5: Step Diagrams

- Common Process Patterns for Editing, Quality Review and Approval
- Sequence Control With Paths, Return Steps and Closing Steps
- Diagram Design in the Web Designer for a Land Records Process
- Business Process Modeling From Written Procedures
- Diagram Review Checklist Before Release to Editors

Day 6: Job Templates

- Job Template Design Considerations for Different Job Types
- Default Properties and Extended Properties Tables
- Job Activities and Audit History Records
- Automatic Job Creation From Schedules and Incoming Requests
- Template Naming and Versioning Rules for a Shared Catalog

Day 7: Step Types and Configuration

- Commonly Used Step Types and Their Settings
- Question, Application and Geoprocessing Steps Configured for Editing Tasks
- Step Configuration for Performance and Clear Instructions
- Step Types That Reduce Manual Handoffs in Utility Maintenance Requests
- Testing Step Behavior With Sample Jobs

Day 8: Advanced Logic With Arcade

- Design Considerations for Branching and Multi-Team Processes
- Parallel Steps and Output Values for Concurrent Review
- ArcGIS Arcade Expressions for Conditional Routing and Custom Values
- Step Scheduling for Recurring and Time-Based Jobs
- Error Handling and Recovery Paths for Failed Automated Steps

Day 9: Monitoring, Deployment and Upkeep

- Bottleneck Analysis From Job History and Status Times
- Centralized Asset Organization for Templates, Diagrams and Queries
- Custom Charts and Shared Queries for Production Dashboards
- Deployment Practices for Moving From Test to Production
- Maintenance, Tuning and Troubleshooting After Go-Live

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Day 10: Building a Production Rollout in Practice

- Exercise: Step Diagram Built From a Utility Network Edit Request Procedure
- Exercise: Job Template With Extended Properties for Parcel Updates
- Exercise: Arcade-Driven Branch and Error Path Tested on Sample Jobs
- Exercise: Production Dashboard With Charts and Shared Queries
- Job Tracking Rollout Plan Completed for Your Own Team

Case Studies and Exercises

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

- Case study: an electric utility moving network edits from email requests to tracked jobs; you decide the job types and approval steps.
- Case study: a municipal land records office with parcel updates waiting for review; you find the bottleneck and redesign the sequence.
- Exercise: a water utility maintenance request process; you build the step diagram and template for it.
- Exercise: a transport agency's linear referencing updates; you plan the deployment and licensing for a pilot group.

What You Take Back

You take back the Job Tracking Rollout Plan, the document that sets out how your team moves from installation to production use. In your first month back you use it to confirm licensing, build the first two job templates in a test site and agree go-live steps with your administrators.

- A deployment and licensing outline for your ArcGIS Enterprise site.
- A catalog of job types, templates and extended properties.
- Step diagrams for your two most common processes.
- A monitoring dashboard design and an upkeep checklist.

Quick Answers FAQ

What do I need to know before the complete ArcGIS Workflow Manager course?

You should already edit or publish content in ArcGIS Pro and understand basic ArcGIS Enterprise terms such as portal and hosted layers. Administration experience helps on the deployment days but is not required.

How does the complete ArcGIS Workflow Manager course differ from a short introductory course?

A short introductory course covers setup and running jobs. The complete two-week sequence continues into job templates, step types, Arcade logic, monitoring and enterprise deployment, so one team can carry a rollout from pilot to production.

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Can ArcGIS Workflow Manager handle non-GIS tasks?

Yes. Jobs can include steps that do not touch a map, such as approvals, document checks or questions, alongside editing steps, so permitting and request processes can be tracked end to end.

What do I take back from the complete ArcGIS Workflow Manager course?

You take back a Job Tracking Rollout Plan with a deployment and licensing outline, a template catalog, step diagrams for your main processes and a monitoring dashboard design.

For Your Manager

After this course, your team member can plan and configure an enterprise deployment, design job templates and step diagrams, add Arcade automation and monitor production. They return with a Job Tracking Rollout Plan for the team, first used to confirm licensing and build the first job templates in a test site before go-live.