ArcGIS Online for Administrators

Rachel Weeden
Agenda

1. Establishing the vision and governance
2. Configuring your organization’s home
3. Establish your brand
4. Organize your organization
5. Add useful content
6. Create useful information products
7. Invite members
8. Monitor and manage
9. Administrative tools
Establish the vision and governance
Your ArcGIS organization

The center of your geographic information ecosystem
Vision and Governance

• Know the answers to these questions –
  - Who are the champions?
  - Who are the stakeholders?
  - What is the mission and vision?
  - What workflows will it support?
  - What are the deliverables?
  - Who is the audience?

• Consider the following-
  - Establish a curator, or group of curators
  - Form a governance committee
  - Meet early and often
Suggestions

• Communicate early, often, and well
• Prototype and test before rolling out
• Implement successful patterns
• Establish essential procedures and guidelines
• Be flexible, adapt, and evolve
Configure your organization home
Your organization home
Organization settings

- Home page (banner and background)
- Featured content (gallery ribbon)
- Gallery content
- Default map and basemaps
- Custom app templates
- Utility services
- Security settings
- More…
Groups are building blocks

- **Organization resources**
  - Gallery
  - Featured content
  - Public galleries

- **Map resources**
  - Basemaps
  - App templates
  - Facilitate Search
The first impression

Not necessarily for public access
Model Organizations

- For local government, utilities, emergency management, and more
- Download from ArcGIS Online
  - Group framework outline and descriptions
  - Graphics
  - Documentation
  - Apps
Demonstration
Establish your brand
Organization visual branding
Organization profile

Basic Map of Greenville, SC

Basic Layer Map allows you to create your own map using authoritative content from the City of Greenville through our participation in ESRI’s Community Maps program. Also includes dynamic map layers and static overlay map layers.

Greenville Cemetery Viewer

The City of Greenville's Cemetery Viewer allows easy access to locate specific interments (graves) or deceased lots in the Springwood and Richland cemeteries. You can search interments by name or death date, and search plots by name or number.

City of Greenville, SC GIS

This is the official ArcGIS.com account for GIS content published from the City of Greenville South Carolina. You may contact us directly by email at gis@greenvillesc.gov or consult our city web page at http://www.greenvillesc.gov/GIS for additional options and information. The City of Greenville was an early pioneer in geospatial technology in 1983 as.

Kentucky DGI

Kentucky Division of Geographic Information 100 Fair Oaks Lane Frankfort, KY 40601 502-564-6231ogi.inquiry@ky.gov http://kygeonet.ky.gov/
Organize your organization
Groups are a framework
Supporting departments, projects, and workflows
Groups help organize activities

- Access to resources
- Collaboration within the organization
- Collaboration between organizations
Group best practices

- Use consistent visual cues
- Intuitive naming conventions
- Add useful descriptions
- Pre-populate with content
- Create a resource destination
Add useful content
Add existing content

- ArcGIS services
- Shapefiles, spreadsheets, map templates, and more…
- Create new hosted services as needed
Registering your ArcGIS services

(1) Add service

(2) Configure

(3) Save layer
Make your content discoverable

Flood and Hurricane Inundation Risk Map of Gloucester, MA

Description

This map displays the combined risks from flooding and hurricane inundation, focusing on low-income and low-income elderly communities. In addition to risk assessment, a number of adaptation strategies and challenges are marked. Many impacted areas are not candidates for infrastructure aimed at mitigating flooding. Gloucester does, however, have plans in place to install a seawall at Cape Ann, which could alleviate some flooding in that area. Other areas are marked that have no current adaptation strategies and that are significantly vulnerable, due to their demographics. Schools and community centers are also marked as potential refuges for new residents following extreme weather events. To meet the challenges of adapting to climate change induced coastal flooding, Gloucester should consider retrofitting buildings that address the needs of environmental justice areas. These might include establishing a reflex fund for low-income households, reviving communities in coastal areas through their role, establishing community centers, and other disaster relief, taking into account what could become impossible. Additionally, restoring wetland habitat and not allowing rebuilding in flooded areas could enhance community resilience in the future.
After you save and before you share...

USA Tapestry Segmentation

This map shows the dominant lifestyle segment in an area in 2012, based on Esri’s Tapestry Segmentation system. The map displays the dominant segment’s LifeMode summary group color. The “dominant” segment is most useful at the transactional level because it captures the primary consumer within an area. It provides a detailed level of insights into consumer spending and behavior at the local level.

Tapestry Segmentation, Esri’s geodemographic market segmentation system, classifies U.S. counties into 67 segments that reflect lifestyles/life stages and 11 Urbanization Summary Groups that show levels of affluence among people and households. The segments are based on consumer spending and lifestyle, while the Urbanization Summary Groups are created from county relationships and population densities to provide an urban/rural breakdown. The data is updated every two years.

The map is designed to be displayed in conjunction with the Canvas basemap with a transparency of 25-50%. For a broader view of markets, segment lifestyles/life stages and 11 Urbanization Summary Groups that show levels of affluence among people and households. The segments are based on consumer spending and lifestyle, while the Urbanization Summary Groups are created from county relationships and population densities to provide an urban/rural breakdown. The data is updated every two years.
Create useful and compelling information products
Maps
How we communicate geographically
Pop-ups
Consider the entire information product

Charts

Images and Links

Formatted text and Charts
Map viewer vs. apps
Deliver your map in the right context

Map viewer (for authoring)

Storytelling basic template

Public information template

Story map tour
Invite members
Invite users

Invite Users to WDC

Step 1 of 3
How would you like to invite users to your organization?

- Pre-establish new ArcGIS logins for the users to be invited.
- Have invited users join using either their existing ArcGIS login

NEXT

(Pre-establish recommended)

Invite using file

Upload a CSV file that contains a list of users in your organization to establish logins for. Note that the CSV file must contain a header (first line) with these field names: First Name, Last Name, Email, and Role.

File:

Message Users Will Receive:

George Washington has invited you to join an ArcGIS Online Organization, WDC (Prototype).

UPLOAD FILE AND REVIEW INVITATIONS

Use enterprise logins
(Best)

Assign role
User Roles

- **Built-in Roles**
  - Administrator
  - Publisher
  - User

- **Custom Roles**
  - Templates
  - Fine Grained Privileges

- **Use Cases**
  - Restrict Access
  - Restrict Credits
# Role privileges

<table>
<thead>
<tr>
<th></th>
<th>User</th>
<th>Publisher</th>
<th>Administrator</th>
<th>Custom</th>
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</thead>
<tbody>
<tr>
<td>Use and share maps and apps</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Create items</td>
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<td>Join and create groups</td>
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<tr>
<td>Edit features</td>
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<td></td>
</tr>
<tr>
<td>Perform analysis</td>
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<tr>
<td>Publish hosted services</td>
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<td>✔️</td>
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<tr>
<td>Manage the organization and users</td>
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<td></td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

Optional
Administrator Controls on Users

- Admins can
  - Manage Items, Groups, Profile
  - Disable Users
  - Delete Users
  - Reset User’s Password
  - Change Role
  - Enable Esri Access
Credit Budgeting

- Enabled/disabled for your organization
- Assign a number of credits to one or more users
- Can be changed at any time
- Email notifications if exceeded
Authentication Options

Password

Password Policies

Multi-Factor

Enterprise Logins
Enterprise Identities

• Use your own identity provider
  - SAML 2.0
    - ADFS
    - NetIQ Access Manager
    - Shibboleth
    - ...

• Can add users:
  - Automatically upon login
  - With an Invitation

• Can use ArcGIS Online identities with Enterprise Identities
Multi-Factor Authentication

- Additional security with second factor at login
- Support for Google Authenticator or MS Authenticator
- Admin needs to enable for Organization
- Must have 2 admins
- Users setup their own Multi-factor
Password Policies

- Default Password Policy
  - 8 characters with at least 1 number
- Can Customize
  - Complexity
  - History
  - Expiration
Monitor and Manage
Organization Status and Management
Administrative Tools
Common Administrative Tasks

• Feature content
• Curate public groups
• On-board & off-board users
• Transfer ownership of items & groups
• Review content, groups, comments
• ...


Some Tasks May Demand Scripting

- **Batch content, group, and user management** *(e.g. remove/add users in bulk)*
- **Advanced Housekeeping**
  - **Front end** *(e.g. find/remove test items, find incomplete groups/items and alert owners)*
  - **Back end** *(e.g. find broken links and escalate, update references as hosts/services change)*
- **Custom reports** *(e.g. weekly summary reports)*
- **Managing content across multiple portals** *(e.g. sync, back/up restore items)*
ArcGIS REST API

Remove Users
Managing your organization

URL:
http://<portal-url>/removeusers (POST only)

Description
The Remove Users operation (POST only) allows the administrator to remove users from a portal. Before the administrator can remove the user, all of the user's content and groups must be reassigned or deleted.

Request Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Details</th>
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</thead>
<tbody>
<tr>
<td>[Common Parameters]</td>
<td>For a complete listing, see Common parameters.</td>
</tr>
<tr>
<td>users</td>
<td>Comma-separated list of usernames to remove. Example: users-jamsh</td>
</tr>
</tbody>
</table>
ArcGIS Marketplace – marketplace.arcgis.com

- GEO-Jobe admin tools
Resources

- ArcGIS Online Documentation
- ArcGIS Online Blog
- Online training
- Portal Services REST API
- ArcGIS Organization Administration Wiki
Please Take Our Survey!
Your input in our surveys enable us to maintain high standards in our sessions

Download the Esri Events app and find your event
Select the session you attended
Select “User Presentation Survey” or “Technical Workshop Survey”
Complete Answers and Select “Submit”