Best Practices for your ArcGIS Online Organization

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Best Practices for your ArcGIS Organization

Workshop Overview

• Not a step-by-step how to, but guidance and tips
• A discussion of best practices for you to consider
• Topics
  - Establish your ArcGIS organization
  - Configure for best experience
  - Engage users
• Software demonstrations, and Q&A
Your ArcGIS organization
Your geographic information portal

- Executive access
- Work anywhere
- Enterprise integration
- Public engagement

- Knowledge workers
- Professional GIS
- Developer community

ArcGIS
Establish the vision and governance
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
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
Other ways to deliver access to your content

• Embed maps and apps
• Group gallery app template
• Group gallery ribbon
• ArcGIS for open data
Model Organizations

• For local government, utilities, emergency management, and more
• Download from ArcGIS Online
  - Group framework outline and descriptions
  - Graphics
  - Documentation
  - Apps
An Example

Welcome to MapIT Minneapolis!
The City's enterprise mapping platform

This is your gateway to intelligent maps, focused applications and other "geoinformation" for Minneapolis. Answering the "where" question for any project, initiative or important decision is now easy for everyone!

You can use this portal to access maps, information, analytical tools, and even make your own maps. MapIT Minneapolis includes City maps and data along with map data from other sources to help you use the power of maps to make informed decisions.

Ask A Question  Create A Map  Map Data in Excel
Establish your brand
Organization visual branding
Organization profile

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 502-564-6231 ogi.inquiry@ky.gov http://kygeonet.ky.gov/
Review and Q & A

- Establish the vision and governance
- Configure your Organization Home
- Establish a brand for your content
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
Group affiliation

- Groups can be:
  - Private
  - Organization only
  - Public
- Membership:
  - User can apply
  - Invite only
- Contributors:
  - Only group owner
  - All members
Add useful content
Add existing content

- ArcGIS services
- Shapefiles, spreadsheets, map templates, and more...
- Create new hosted services as needed
Optimize for use

ArcGIS Online Best Practices

- Bicycle Lanes
- Bike Lane Street Right-of-Way
- Bike Trails
- Capital Bike Share Locations
- Signed Bike Routes
- Bridge Points (DOT)
- Bridge Polygons (DOT)
- Bridges and Tunnel Entrances
- Alley Maintenance Inventory
- Budgeted Construction Project Point
- Budgeted Construction Project Line
- Completed Construction Project Point
- Completed Construction Project Line
- Current Construction Project Point
- Current Construction Project Line
- CCTV - Street
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 and hazards, 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 build a second tide gate on Mill Pond, 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 relief centers following extreme weather events. To meet the challenges of adapting to climate change induced coastal flooding, Gloucester should consider putting policies into place that address the needs of environmental justice areas. These might include establishing a relief fund for low-income households, educating communities on normal flood events of their risk, establishing community centers for post-disaster relief taking into account where roads may become impassable. Additionally, restoring wetland habitat and not allowing rebuilding in flooded areas could enhance community resilience in the future.

Groups

Organization gallery
Better thumbnails

Location hints

Graphic hints

Content hints

Hybrid
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
Apps
Putting together the entire information experience
Easy to configure

Configure hosted application online

Download, customize, and host from your own server
Map viewer vs. apps
Deliver your map in the right context

Map viewer (for authoring)

Public information template

Storytelling basic template

Story map tour
Review and Q & A

• Organize your organization and assets
• Add content and leverage your work
• Creating useful information products
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

(Pre-establish recommended)

Use enterprise logins (Best)

Invite using file

Assign role
Organization roles

• Built-in roles
  - Administrator
  - Publisher
  - User

• Custom roles
  - Based on templates
  - Created by an administrator
## Role privileges

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

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  - Public
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  - All members
Member profiles

Carrie Tropasso
Carrie Tropasso is the GIS Technical Lead and main story map and collector app developer for the Pennsylvania Department of Conservation and Natural Resources (DCNR). She has a master's degree in Geographic Information Service and has over 15 years of GIS experience in state and local government and private consulting.

Jim Herries
Jim Herries joined the Esri Cartography team in spring 2010 as a product engineer to contribute to the research and development work in map templates, web maps and applications. He can be reached at jherries@esri.com. He served as an application developer and project manager in Esri Professional Services for ten years, then product.
Connect with enterprise workflows and systems
Your ArcGIS organization serves everyone

ArcGIS for Desktop

Esri Maps for Office, Cognos, SAP, etc.

Collector for ArcGIS
Dashboard for ArcGIS
Explorer for ArcGIS
Promote your organization
Promote your organization
Review and Q & A

- Invite members
- Connect with your enterprise
- Promote your organization
Resources


Online training: http://www.esri.com/training/main
Esri UC 2014 | Technical Workshop | ArcGIS Online Best Practices

Understanding our world.