ArcGIS Online Steps for Success
A best practices approach

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ArcGIS Online Steps for Success

A best practices approach

- Not a step-by-step how-to, but guidance and tips
- A discussion of best practices for you to consider
- Not necessarily in order
- Each organization is different, implement what works
- Software demonstrations, examples, and Q&A
What is Web GIS?

Foundation of a modern GIS

• A pattern, or architectural approach
• Powered by services
• Components are connected
• Uses a portal
• In the cloud, on premises, or both
What is a portal?

Essential component of a GIS

- Framework for managing and using content
- Supports identity
- Manages users and collaboration
- Sharing
- GeoInformation model
- Hosted in the Cloud (ArcGIS Online)
- Hosted on-premises (ArcGIS Enterprise)
- …or Both
Your portal

The center of your geographic information ecosystem
Your circle of influence
Amplifies your work, magnifies what you do

Executive Access
Public Engagement
Professional GIS
Knowledge Workers
Developer Community
Enterprise Integration
Work Anywhere
Establish the vision and governance

UNDERSTAND YOUR ROADMAP TO SUCCESS AND WHAT SUCCESS MEANS
Vision and Governance

Find the right people
- Who are the champions?
- Who are the stakeholders?
- Who is the audience?

Discover what they need
- What is the mission and vision?
- What workflows will it support?
- What are the deliverables?

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

- Communicate early, often, and well
- Establish a rough time for deliverables
- Prototype and test before rolling out
- Implement successful patterns
- Establish essential procedures and guidelines
- Be flexible, adapt, and evolve
DISCUSSION
Determine your implementation pattern
Consider your implementation
Consider your implementation
Consider your implementation
Consider your implementation
Consider your implementation
Consider your implementation
Things to consider

- Other enterprise services and databases
- Server extensions
  - Insights
  - GeoEvent Tracking Server
  - Advanced analytics
- ArcGIS Pro adoption
- Standard vs Premium feature data store (M1, M2, M3)
Things to consider

- Host on your own vs. Esri managed services
  http://www.esri.com/arcgis/services/managed-cloud

- Enterprise Builder, Chef, Cloud Builder
  https://server.arcgis.com/
Things to consider

• Host on your own vs. Esri managed services
  http://www.esri.com/arcgis/services/managed-cloud

• Enterprise Builder
  https://server.arcgis.com/

• Chef cookbooks
  https://github.com/Esri/arcgis-cookbook

• Cloud Builder
Create a great destination

BUILD YOUR DREAM 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…

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Page</td>
</tr>
<tr>
<td>Gallery</td>
</tr>
<tr>
<td>Map</td>
</tr>
<tr>
<td>Item Details</td>
</tr>
<tr>
<td>Groups</td>
</tr>
<tr>
<td>Utility Services</td>
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<tr>
<td>Roles</td>
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<tr>
<td>Marketplace</td>
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<tr>
<td>Credits</td>
</tr>
<tr>
<td>Security</td>
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<tr>
<td>Open Data</td>
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</tbody>
</table>
Organization settings – Esri vector basemaps

Map

Configure the components people in your organization will use to author maps.

Basemap Gallery

Select the group whose webmaps will be shown in the Basemap Gallery.

- Esri Default
- Use Esri vector basemaps in supported ArcGIS apps.
Organization settings – Roles

Roles

Create, edit, and manage roles in your organization. You may create a role based on an existing role or role template, allowing or denying privileges associated with the role as you deem necessary.

Note that when creating or editing a role, changes aren’t saved until you click Save Role.

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Minimum Level</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Data Admin and Author</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Engineer</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>GIS Data Administrator</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Publisher</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>User</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Viewer</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Organization settings – Budgeting credits

Credits

Manage and control expenditures by crafting a budget that assigns a flexible allocation of credits to some or all organization members. An allocation of any amount can be assigned to your members one at a time or as part of a bulk operation. Allocation for members may be modified at any time.

If this method does not meet your needs, you can revert to solely making use of the default organization-wide credit monitoring strategy.

Credit Budgeting and Allocation

Check the checkbox below to budget credits. Once you have enabled the credit budgeting tools, you can set allocations for one or more members by clicking the button that will appear below. You can also set the allocations in the Action menu associated with an individual member in the Organization page Members grid.

- Enable credit budgeting tools

[SET DEFAULT ALLOCATION] [MANAGE BUDGET]
Groups are building blocks

• For your organization
  - Basemaps, configurable apps
  - Galleries, featured content
  - Public galleries

• For members and their work
  - Mirror organization structure
  - Support organization projects, workflows, and initiatives

✔ More details on groups later...
The first impression

- Appealing home page
- Featured gallery, with branding
- Featured links and resources
- Help and how-to
- Links to city website and Open Data

☑️ Not necessarily for public access
Other ways to deliver access to your content

- Embed maps and apps
- Group gallery apps & ribbons
- Open Data for ArcGIS
ArcGIS Solution templates for organizations

- Tailored to specific domains
- Follow best practices & trends
- Include:
  - Platform (ArcGIS organization) configurations
  - Configurable apps and map resources
  - Community
Example: ArcGIS for Local Government

Maintain Property Inventories
A collection of maps and apps used by survey technicians to maintain a survey from survey book, parcel book, deed, parcel summary, and tax information. 

Photo Inventory Properties
The Photo Survey application can be used by local governments to publish street-level photo collections and conduct focused property surveys that may identify blight or damaged structures, or construction activity.

Note information model requirements
Example: Boston Maps
Establish your brand

A EASILY RECOGNIZED VISUAL IDENTITY
What is a brand?

brand
/brand/
noun

• Unique design, sign, symbol, words, or a combination.
• Creates an image that identifies a product and differentiates it.
• The image becomes associated with a level of credibility, quality, and satisfaction in the consumer's mind.
Organization visual branding
Organization visual branding
Organization profile

Montana State Library

The Montana State Library, Geographic Information, develops and maintains an extensive collection of Montana's geographically referenced information about the cultural and natural resources for the state. Visit: http://geoinfo.msl.mt.gov | Phone: 406-444-6354

or

KYTC GIS

This user has not provided any personal information.
Organization shared theme

- Apply brand colors and logo to information products
  - Configurable apps, Story Maps, Web AppBuilder, Open Data sites
DISCUSSION & DEMONSTRATION
Organize your organization

ESTABLISH A FOUNDATION FOR SUCCESS
Groups are a framework

Supporting departments, projects, and workflows

- Solution templates
- Org chart
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
- Auto-assign members

☑ Create a destination
Groups can be:
- Private (only owner and members can find)
- Organization only
- Public

Membership:
- Users can request membership
- Admission by invite only
- Anyone

Contributors:
- Only group owner
- All members of the group
Add to your favorites

Share in a group you own
Favorites

For often used items, and your favorite maps and apps

• Easy to find when authoring maps or story maps
DISCUSSION & DEMONSTRATION
Add useful content

THE FUEL FOR YOU ORGANIZATION
Add existing content

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

(1) Add service

(2) Configure

(3) Save layer
Prevent deletion

Delete Protection

☑ Prevent this item from being accidentally deleted.
Feature layer views

• Common feature layer, multiple user views onto the layer

<table>
<thead>
<tr>
<th>Public</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![People Icon]</td>
<td></td>
</tr>
<tr>
<td>• Add new sightings to the map</td>
<td></td>
</tr>
<tr>
<td>• Only view sightings that have been reviewed by city staff</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City Staff (field)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![City Staff Icon]</td>
<td></td>
</tr>
<tr>
<td>• Add new sightings to the map</td>
<td></td>
</tr>
<tr>
<td>• View sightings regardless of their review status</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City Staff (reviewers)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![City Staff Icon]</td>
<td></td>
</tr>
<tr>
<td>• Update and delete sightings when reviewing (duplicates, fake reports)</td>
<td></td>
</tr>
<tr>
<td>• View only sightings that are pending review</td>
<td></td>
</tr>
</tbody>
</table>
DISCUSSION & DEMONSTRATION
Create great geoinformation building blocks
2015 Clothing/Accessory Store Market Opportunity in the United States

This map shows opportunity within the clothing/accessory market in the U.S. in 2015, by state, county, ZIP Code, tract and block group. ArcGIS Online subscription required.

Description

The pop-up is configured to include the following information for each geography level:

- Count of clothing/accessory stores - NAICS 448
- Total annual NAICS 448 sales (supply)

Concise Summary

Good Thumbnail

Great Description

Good Tags

Usage Notes

Etc...
Better thumbnails

Location hints

Graphic hints

Content hints

Hybrid
Living Atlas Contributor App

Content for the Planet

The Living Atlas of the World is the foremost collection of global geographic information from Esri and its partners, including maps, apps, and data layers used to support critical decision making. Learn More or read the FAQ.

Contribute Now  Browse
Make your content discoverable

Description and Tags

Groups

Organization gallery
DISCUSSION & DEMONSTRATION
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

Complete the user experience
Map viewer vs. apps

Deliver your map in the right context

Map viewer (for authoring)

Storytelling basic

Public Information

Story Map Tour
Easy to configure
Web AppBuilder

• Build apps using widgets
• Easiest way to create custom configurable apps for your organization
• Developer edition
Alternative: Download source, modify and host
DISCUSSION & DEMONSTRATION
Invite members and make them welcome
Invite users

1. How would you like to invite or add members to your organization?
   - Add members automatically without sending an email.
   - Send invitations to preestablished user names.
   - Send invitations for existing users.
   
   (Pre-establish recommended)

2. Invite and establish Role

   - Preestablish new ArcGIS logins one at a time or in batch from a file.
   - Select any role without administrative privileges for the member to be a part of.

   - One at a time
   - From a file

   - Email:
   - First Name:
   - Last Name:
   - Username:
   - Role:
   - Message Member Will Receive:

   - BACK
   - INVITE ANOTHER
   - REVIEW INVITATION(S)

Use enterprise logins
(Best)
Organization roles

- **Built-in roles**
  - Administrator
  - Publisher
  - User

- **Custom roles**
  - Based on templates
  - Created by an administrator

- **Credit limits**
Level 1 vs. Level 2

- Level 1 – can view content, but cannot create, own, or share content.
- Level 2 – can view, create, and share content.
Levels, Roles, and Privileges

- Viewer – Level 1 or Level 2
- User – Level 2
- Publisher – Level 2
- Administrator – Level 2
- Custom roles – limited by Level
Ensure Good User Profiles

Carrie Tropasso
Carrie Tropasso is the Assistant Director of GIS 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 17 years of GIS experience in state and local government and private consulting.

Jim Herron
This account is used by Jim Herron to publish maps for specific projects and atlases. Contact Jim at jherries@esri.com with questions about maps and packages shared by this account.

No personal information provided.
Groups support users, project, workflows

Pre-populate groups with meaningful content
Connect to enterprise systems and workflows

GIS IS A PART OF YOUR GREATER ENTERPRISE
Your ArcGIS organization serves everyone

ArcGIS for Desktop

ArcGIS Maps for Office, Cognos, SAP, etc.

Collector for ArcGIS
Dashboard for ArcGIS
Explorer for ArcGIS
DISCUSSION & DEMONSTRATION
Open your data

THE MORE USERS THE MORE VALUE

Bern
Open Data Is All Over the World

Explore 48,632 Open Datasets from 3,155 Organizations Worldwide.

Newest Data

ROUTE83 V EVT ORL MAINTENANT
- events: routes maintenance, routes départmentaux du VAE, représentation vectorielle et linéaire
- June 26, 2016

ROUTE83 V EVT ORP MAINTENANT
- events: routes maintenance, routes départementales du VAE, représentation vectorielle et linéaire
- June 26, 2016

GRSM BACKCOUNTRY SHELTERS
- Beyond doubt: the most generally useful building in any park is a shelter, usually open, but sometimes enclosed or enclosable, and then
- June 26, 2016

#eventement
#eventement
#nationalparkservice
Open Data

- Built-in to your organizations
- Uses your organization content
- Group-based
- Multiple sites
- Serves data for
  - Developers
  - Contractors
  - Businesses
  - Citizens
Example: My City Houston

My City Houston
City of Houston, Texas - Maps & Application

Welcome to the official City of Houston's My City ArcGIS App

The City of Houston’s Enterprise GIS Team focuses on the development and continuing enhancement of an Enterprise System that serves the needs of all City of Houston departments, staff, and citizens. Through coordinated data development, management, and state-of-the-art mapping services, City of Houston Enterprise GIS seeks to improve access to information by improving the underlying data from which information is derived. Visit http://mycity.houstontx.gov

City of Houston GIS Open Data

Search for open data

Welcome

This is the official City of Houston GIS Open Data ArcGIS Website. We are focused on sharing data with developers, agencies, communities, and the public to help them in their geographic information system (GIS) data that can be used in their applications. The City’s datasets are constantly updated to ensure that the data are of the highest quality and as current as possible. This results from cooperation between the departments responsible for each dataset, and developing processes for regular updating each dataset. Questions can be directed to our GIS Helpdesk 713-212-5555. For technical questions, please contact: mycityhelpdesk@houstontx.gov - The Enterprise GIS Team.

Quick Links:
- ArcGIS Online of COH
- My City ArcGIS.com Map
- My City Map & Apps
- City of Houston
Configuring Open Data

(1) Settings

(2) Enable Open Data

(3) Designate participating Groups

(4) Configure Sites
Open Data is now configured via Hub

- ArcGIS Hub Open Data
- ArcGIS Hub Collaboration
- ArcGIS Hub Initiatives
DISCUSSION & DEMONSTRATION
Curate, monitor, manage
Member and item curation

• Usage by app
• Usage by member
• Members by role and credit usage
• Utilization summary
• Pro usage
• More…
Organization Status and Management
ArcGIS Marketplace – marketplace.arcgis.com
ArcGIS Online Assistant

A swiss army knife for your ArcGIS Online and Portal for ArcGIS accounts.

- Log in to ArcGIS Online
- Log in to Portal for ArcGIS

**Inspect**
View the underlying JSON for any item in ArcGIS Online or your Portal.

**Update**
Modify the URLs for services in web maps and registered applications.

**Copy**
Search for and copy content to your account and other accounts.
ArcGIS Monitor
GitHub Esri Repo - https://github.com/Esri/ago-admin-wiki
DISCUSSION & DEMONSTRATION
Promote your organization and nurture it
Promote your organization
questions & answers
Thanks!

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Jeff Archer
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