Administering Members in your Organization

Kelly Gerrow and Stephanie Wendel
What you’ll learn today

• Planning Considerations
• Management tools
• Best Practices for Bulk member management
• Reviewing the Status of your organization
Understanding your Administrative Needs

Kelly
ArcGIS Online Features
Requirements | Understanding your Administrative Needs

Apps and Workflows

Members

Content and Services

Access and Security

Sharing
Sharing
Requirements | Understanding your Administrative Needs

Private
Sharing
Requirements | Understanding your Administrative Needs

Groups
Sharing
Requirements | Understanding your Administrative Needs

Organization
ArcGIS Online Features | Sharing
Requirements | Understanding your Administrative Needs

Everyone
Sharing
Requirements | Understanding your Administrative Needs
Who are your Members?

- Executives
- Operations
- Knowledge Workers
- Mobile Workforce
- Analysts

 GIS Professionals

- Curate Content
- Author Maps
- Configure & Develop Apps

Web GIS

Members
Requirements | Understanding your Administrative Needs
Access and Security
Requirements | Understanding your Administrative Needs

**Policies**

- [ ] Allow access to the organization through HTTPS only.
- [x] Allow anonymous access to your organization's website. (cloudyGIS.maps.arcgis.com)
  What does this mean?
- [ ] Allow only standard SQL queries.
- [ ] Allow members to edit biographical information and who can see their profile.

**Enterprise Logins**

You can set up your organization so that your users will be able to sign in to ArcGIS using the same username and password that they use with your existing on-premises systems.

The key to this is through a technology known as identity federation that this section will help you set up through two actions.

- [ ] SET IDENTITY PROVIDER
- [ ] GET SERVICE PROVIDER

**Administrative Privileges**

- **Members**
  - View all
  - Update
  - Delete
  - Invite
  - Disable
  - Change roles
  - Manage licenses

- **Groups**
  - View all
  - Update
  - Delete
  - Reassign ownership
  - Assign members

- **Content**
  - View all
  - Update
  - Delete
  - Reassign ownership
  - Create with update capabilities
Which apps and workflows do your members need access to to complete their work?

- Web Application
- Collector for ArcGIS
- Drone2Map for ArcGIS
- ArcGIS Pro
- Operations Dashboard
- Story Map
- Esri Business Analyst
- Survey123 for ArcGIS
- Insights for ArcGIS
- AppStudio for ArcGIS
- ArcGIS Maps for Adobe Creative Cloud
Content Strategy
Requirements | Understanding your Administrative Needs

What is your content strategy?

Browse Living Atlas Layers

Basemaps

Groups

Analysis

Geocoding

Establish the geocoders that members of your organization will have access to. Click Add Geocoder to reference a URL, specify a user friendly name, and set other properties. You can also reorder, configure, or delete your geocoders below.

ADD GEOCODER

Name

Esri World Geocoder
Who are the Members of your Organization?

Describe their work
• Publishing
• Geocoding
• Analysis
• Data collector

What Apps do they use?
• ArcGIS Pro
• Navigator
• Business Analyst Web App

How is any created content shared?
• Public?
• Org?
• Private?

What Data do they need access to?
• Public Data
• Data-living atlas
• Authoritative organization data
• Specific Web App to perform tasks
Users in Wizards organization
What do your members need access to in order to complete their work?

Create Initial Member Plan

- Level
  - Level 1
  - Level 2
- Groups:
  - Used to manage access to content
- Roles:
  - Control capabilities that users have access to
- Credits:
  - Credit use can be managed by giving access to a capability (privileges and roles)
  - Amount of expenditure per user can be managed by credit budgeting.
- Licenses:
  - What other software does the user need access to?
The Plan
Implement the Plan

Part 1: Configure Pre-established Roles and Groups
Custom Roles: Required Privileges for General Members

Implement the Plan - Set up Pre-established Roles and Groups
Custom Roles: Required Privileges for Administrative Members

Implement the Plan - Set up Pre-established Roles and Groups
Custom Roles: Reserved Privileges

- Configure website
- Configure custom roles
- Set up enterprise logins
- Change member role to or from administrator
- Share content with the public when organization does not allow members to share outside the organization
- Reset passwords
- Assign credits
- View and review credit status
Custom Roles: Contractor
Custom Roles: Content Manager
Demo – Setting up custom roles
Pre-established Groups
Implement the Plan - Set up Pre-established Roles and Groups

• Content Groups
  - Water Content
  - Utility Content
  - Forestry Content
  - Public Content
  - QA Content
  - Collaboration Content

• Member Groups
  - Water Content
  - Utility Content
  - Forestry Content
Demo – Setting up groups

Stephanie Wendel
Implement the Plan

Part 2: Invite Members | Configure
Administrative Tasks for Setting up the Organization

Implement the Plan – Invite Members

1. Invite Users
2. Assign Appropriate Role
3. Assign to Group
4. Allocate a Credit budget
5. Assign Licenses
6. My Esri Access
Demo – Inviting members to the organization

Stephanie Wendel
Revisit and Update
Review Member Usage
Revisit and Update

• Content
  - Is the right information built? Apps, Feature Services, tile Services
  - Are they deleting unnecessary information?

• Credits
  - Do users need more credits?
  - Are they using their allotted credits effectively?
  - Where are they spending credits?

• Sharing
  - Are things shared correctly?
  - Are things organized logically?

How do we check for these things?
Demo – Monitoring Members
Kelly G.
Update Based on Changing Needs and Requirements
Revisit and Update

• Manage Members:
  - Password Reset
  - Add to group
  - Enable Esri Access
  - Delete user
  - Disable User
  - Increase/Decrease Credit Budget
  - Change Role
Choose your method of specifying users

- **Groups:**
  - Used to manage access to content
  - Can be used to identify a subset of users

- **Roles:**
  - Control capabilities that users have access to
  - Can be used to identify a subset of users

- **Tags:**
  - Use the Rest API to tag users
Demo – Member Maintenance

Stephanie Wendel
Who is the ArcGIS Online Administrative Wizard of your Organization?

Considerations:

• Who should be responsible for adding and removing members?
• Is there a turnover of users frequently?
• Is there more than one person who will administer members (departmental structure?)
• Is the person who styles the organization the same person who will manage the members?
• Will there be a content manager?
• What kind of reporting is needed about the members in your organization?
Wrap up
We hoped we helped you understand how to:

• Understand the needs of users
• Create initial member plan
• Setup pre-established groups and roles
• Implement the plan
• Review and update capabilities
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Single computer used for presentation

**Use Arial if…**
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Text goes here
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