Administering Members in your Organization

Katie Cullen and Stephanie Wendel
What you’ll learn today

• Agenda
  - Planning Considerations
  - Management tools
  - Best Practices for member management
  - How to review the Status of your organization

• Who is this for?
  - New Administrators
  - Subscription Owners/Managers looking for an Administrator
Understanding Organization Concepts
Security

Understanding Organization Concepts

Policies

- Allow access to the organization through HTTPS only.

Password Policy

Multifactor Authentication

- Multifactor authentication provides all members with ArcGIS accounts in your organization with an extra level of security by requesting an additional verification code at the time of login.
- Allow members to choose whether to set up multifactor authentication for their individual accounts.

Extension Login

- Members can share content publicly.
- Members can search for content outside the organization.
- Show social media links on item and group pages.
Access
Understanding Organization Concepts

Your users will be able to join:
- Automatically
- Upon invitation from an administrator

Default License Level:
- 1
- 2

Social Logins
You can set up your organization so that your members will be able to sign up and sign in to ArcGIS using the logins that they use with social networks like Facebook and Google.

A federation of identity providers
- Allows users belonging to an existing interorganiza supported by the federation.
- Organization’s default limit

Default Esri Access:
- Enabled
- Disabled
Content Strategy
Understanding Organization Concepts

What is your content strategy?

Groups
Basemaps
Analysis

Utility Services

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
Sharing
Understanding Organization Concepts

Private
Sharing
Understanding Organization Concepts

Groups
Sharing
Understanding Organization Concepts

Organization
Sharing
Understanding Organization Concepts

Everyone
Sharing
Understanding Organization Concepts

Distributed
ArcGIS Online Verified Organization
Understanding Organization Concepts

- Esri Verifies Customer Identity
- Public content marked as authoritative
- Can be filtered by Authoritative Status
- Easy to find inside and outside organization
- Requires:
  - Organization Name to match Customer Name
  - Anonymous Access enabled
Who are your Members?

- Executives
- Operations
- Mobile Workforce
- Analysts

GIS Professionals
- Curate Content
- Author Maps
- Configure & Develop Apps

Knowledge Workers

Web GIS
Which apps and workflows do your members need access to complete their work?
Membership Lifecycle
Understanding Organization Concepts
Create Membership Plan
Who is the right Administrator for your ArcGIS Online Organization?

Create a Membership Plan

- 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?
Who are the members of your Organization?

Create a Membership Plan

**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
What do your members need access to in order to complete their work?

Create a Membership Plan

- Level 1 or 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?
Scenario: City of Stickman

- GIS Department within a larger company (Central IT Department)
- Project based work
- Products are a variety of maps, apps and data
- Both Public and Private Content
- Have some central data for analysts
- Projects generally exist between 1 month to a year
Stickman GIS: Users

GIS Manager Donna
GIS Coordinator Katie
GIS Analyst David
IT Manager Brandon
Stickman GIS: Users

Customer Brenda

Contractor Dylan
### The Member Plan

<table>
<thead>
<tr>
<th>Item</th>
<th>Brenda (1)</th>
<th>Dylan (2)</th>
<th>David (2)</th>
<th>Donna (2)</th>
<th>Brandon (2)</th>
<th>Katie (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Client</td>
<td>Contractor</td>
<td>Content Author</td>
<td>Content Manager</td>
<td>Member Manager</td>
<td>Administrator</td>
</tr>
<tr>
<td>Groups</td>
<td>- Water Projects</td>
<td>- Water Data</td>
<td>- Water Data - Water Projects - Water Projects Review</td>
<td>- Public Content Review - Water Projects Review</td>
<td></td>
<td>All</td>
</tr>
<tr>
<td>Credits</td>
<td>0</td>
<td>1000</td>
<td>500</td>
<td>1000</td>
<td>10</td>
<td>No limit</td>
</tr>
<tr>
<td>My Esri Access</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Licenses</td>
<td>None</td>
<td>ArcGIS Pro App Studio</td>
<td>ArcGIS Pro</td>
<td>ArcGIS Pro Business Analyst Web App</td>
<td>None</td>
<td>All</td>
</tr>
</tbody>
</table>
Custom Roles: Contractor
Implement the Plan - Set up Pre-established Roles and Groups
Set Up Groups
Implement the Plan – Configure Organization

• Groups for Managing Content
  - Water review
  - Water Data
  - Public Content

• Organizing users
  - Water projects
  - Conservation projects
  - Sewer projects
## Water Department Groups

<table>
<thead>
<tr>
<th>Info</th>
<th>Water Data</th>
<th>Water Projects Ongoing</th>
<th>Water Projects</th>
<th>Public Content</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Intent</strong></td>
<td>Central repository for all water data</td>
<td>Projects that are ongoing and need to be completed before sharing internally and externally.</td>
<td>Central repository for all ongoing water related projects</td>
<td>All content that is shared publicly is shared to this group by the admin.</td>
</tr>
<tr>
<td><strong>Members</strong></td>
<td>Content Authors</td>
<td>Content Managers</td>
<td>Everyone from the water department.</td>
<td>Default Administrators</td>
</tr>
<tr>
<td></td>
<td>Contractors</td>
<td>Content Authors</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Who can view the group</strong></td>
<td>Only group members</td>
<td>Only Group Members (Update capabilities)</td>
<td>People in the organization</td>
<td>Public group</td>
</tr>
</tbody>
</table>
Implement the Plan
Create Setup Workflow

Implement the Plan

- Configure settings
- Configure custom roles
- Configure groups
- Invite and configure users
Invitation Workflows
Implement the Plan – Invite/Configure Members

1. Choose your method of inviting users:
   - Manually invite via standard interface options
   - Auto-join with Enterprise Logins
   - Batch CSV
   - Scripting via REST API or ArcGIS API for Python

2. What other user properties will you set?
   - Level, Esri Access, Groups, Role
User Configuration Workflow
Implement the Plan

1. Identify what else needs to be configured based on plan
2. Can some things be done in Bulk? I.e. Assign multiple people Pro licenses
   - Can I do this by existing Group?
   - Can I do this by Roles?
3. Assign Users to More Groups
4. Update Properties
Implementing the Plan

Demo
Monitor and Revise
Review Member Usage
Monitor and Revise

• 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?

• Members
  - Has anyone left the company?
  - Are their settings meeting their needs?
Review Schedule Considerations
Monitor and Revise

- How often do you need to review?
- What is important for you to keep track of?
- Will you need someone to help manage these tasks?

<table>
<thead>
<tr>
<th>Daily/Weekly</th>
<th>Monthly</th>
<th>Semi-Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reassign Credits</td>
<td>Add Users</td>
<td>Security Settings</td>
</tr>
<tr>
<td>Named User Licenses</td>
<td>Remove Users</td>
<td>Groups used as settings</td>
</tr>
<tr>
<td>Password Resets</td>
<td>Esri Access</td>
<td>Evaluate Credit Purchasing Needs</td>
</tr>
<tr>
<td>Disable Users</td>
<td>Evaluate Individual Credit Needs</td>
<td>Set Up Custom Utility Services</td>
</tr>
<tr>
<td>Manage Content</td>
<td>Change User Roles</td>
<td></td>
</tr>
</tbody>
</table>
Monitor & Revise Members

Demo
Wrap Up

We hope we helped you…

- Understand the needs of users
- How to create initial member plan
- Implement the plan by configuring organization and inviting members
- Monitor Members through the View Status page
- Revise and update member details
# Relevant Presentations

<table>
<thead>
<tr>
<th>WORKSHOP</th>
<th>LOCATION</th>
<th>TIME FRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ArcGIS Online: An Introduction to Security, Privacy, and Compliance</td>
<td>• SDCC – Room 02</td>
<td>• Tuesday 1-2pm</td>
</tr>
<tr>
<td>• Steps for Success for Your ArcGIS Organization: A Best Practices Approach</td>
<td>• SDCC – Room 29D</td>
<td>• Wednesday 4-5pm</td>
</tr>
<tr>
<td>• ArcGIS Online: Configuring and Managing</td>
<td>• SDCC – Room 04</td>
<td>• Wednesday 1-2pm</td>
</tr>
<tr>
<td>• ArcGIS Online: Road Ahead</td>
<td>• SDCC – Room 32 A/B</td>
<td>• Thursday 8:30-9:30am</td>
</tr>
<tr>
<td></td>
<td>• SDCC – Room 09</td>
<td>• Friday 9-10am</td>
</tr>
<tr>
<td></td>
<td>• SDCC – Demo Theater 07</td>
<td>• Tuesday 11:15am-12pm</td>
</tr>
<tr>
<td></td>
<td>• SDCC – Ballroom 06 E</td>
<td>• Tuesday 1-2pm</td>
</tr>
<tr>
<td></td>
<td>• SDCC – Room 09</td>
<td>• Wednesday 4-5pm</td>
</tr>
<tr>
<td></td>
<td>• SDCC – Ballroom 06 E</td>
<td>• Friday 9-10am</td>
</tr>
</tbody>
</table>
Please Take Our Survey on the App

Download the Esri Events app and find your event

Select the session you attended

Scroll down to find the feedback section

Complete answers and select “Submit”