ArcGIS Online: Item Administration and Group Sharing

Mike Flanagan and Brendan O’Neill
Overwhelmed?
You’re in the right place
Overview

• ArcGIS Online sharing model
• Best practices for item administration and group sharing
  - Tagging
  - Organizing
  - Sharing to groups
• Finding items
  - Keyword search
  - Map Viewer search
• Questions
• Survey
ArcGIS Online sharing model
Deciding how to share your items

<table>
<thead>
<tr>
<th>“I want to…”</th>
<th>Item sharing level(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>…practice ArcGIS Online workflows and create content only accessible by me.”</td>
<td>Keep content private (default)</td>
</tr>
<tr>
<td>…collaborate on a project with other members, but we don’t want the rest of the ArcGIS Online organization to see the items yet.”</td>
<td>Group(s)</td>
</tr>
<tr>
<td>…collaborate on a project with other members, and we want the rest of the ArcGIS Online organization to see the items.”</td>
<td>Group(s) Organization</td>
</tr>
<tr>
<td>…showcase final content from a project and make it available to everyone, including anonymous users.”</td>
<td>Group(s) Organization Public</td>
</tr>
</tbody>
</table>
Tagging items
Tags

- Part of ArcGIS Online metadata
- Associate keywords with items
- Required for every item

![Image of ArcGIS Online tags for population growth data](image)

**2017-2022 USA Population Growth**

**Tags**

USA, US, United States, North America, demographics, US Census Bureau, US Department of Commerce, DOC, census, Key Facts, population, age, family, block groups, tracts, counties, states, population change, predicted growth, growth, growth rate, rate, percent change, population growth, 2010 Census, demographics7, Base, KeyUS Facts
Tags support content discovery

• Very important, especially for production items

• Should be intuitive and comprehensive

• Also adds a sense of value, authority to items
Tags support content discovery

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Tags support content discovery

- Very important, especially for production items
- Should be intuitive and comprehensive
- Also adds a sense of value, authority to items
Develop a tagging strategy

• Develop a list of standard tags for items in your organization
  - Organization name
  - Thematic keyword(s)
  - Project name
  - Geographic location
  - Industry specific keywords

• Create a tag library

• Share these standards as part of a content management document
  - Add the document to your organization
N̄u̇trino Item Details Standards

Title
Enter a descriptive name for the item. If the item is shared with a working group, include ";draft" at the end of the title.

Summary
Enter a brief description of the content that includes:
- What the content represents, e.g., "This content represents the location of marketed sites in the San Diego sales region."
- The content source, e.g., "This content was derived from content provided by the U.S. Census TIGER/Line Shapefiles (http://www.census.gov/geo/maps-data/data/tiger line.html)."

Description
Enter a more detailed description of the content that includes:
- A content description, e.g., "This content represents the location of marketed sites in the San Diego sales region. The sites in rankings. These numbers reflect significance."
- The content source, e.g., "This content was derived from content provided by the U.S. Census TIGER/Line Shapefiles of the regions, making them available at (http://www.census.gov/geo/data/)."

Tags
Make sure all items contain the following tags:
- n̄u̇trino and nutrino.
- One or more place keywords (e.g., "North America", "United States", and "Kansas" would be appropriate for a Kansas, USA dataset).

Access and use constraints
Copy and paste the following statement into all appropriate spaces:
Use of this content is restricted to non-commercial purposes. The content cannot be sold or used for marketing without the express written consent of Environmental Systems Research Institute Inc.
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In no event shall ESRI and/or its licensor(s) be liable for costs of procurement of substitute goods or services; lost profits, lost sales, or business expenditures, investments, or commitments in connection with any business, loss of any goodwill, or for any indirect, special, incidental, exemplary, or consequential damages arising out of this...
Organizing items
New Content page

- New tabs for favorite, group, organization, and Living Atlas items
- View all of your content
- Rename folders
- Table View
- List View
- Grid View
Use folders in your Content page
Organize YOUR content

• Don’t put everything in your home folder

• Create folders for specific projects or purposes

• Many specific folders > few broad
Use your “My Favorites” page

Save items for later

• Quickly earmark items for later use

• Your items or those shared with you

• Filter based on type, data, or sharing status
Authoritative content

- Mark content as *Authoritative* or *Deprecated*
- Ability to designate items based on user role
- Users can filter on this designation
Content categories

- Set up categories for your organization or groups
- Users are able to categorize items so that they are more easily discoverable
Sharing to groups
Groups
Organize your organization

- Created as a way to organize your items
- Many ways to configure
  - Who can see it
  - Who can join it
  - Who can contribute to it
- Useful way to collaborate
- Bring attention to items within a specific area of interest
- Highlight content through different applications in ArcGIS Online
Collaborating with groups

- Group members can:
  - Access items
  - Create web maps or perform analysis with data
  - Make updates to data and items details (if item or group configuration allows)
  - Download resources or data locally (if item configuration allows)

- Owner controls whether other members can contribute items to the group
- Owner can promote a member to Group Managers
- Option to enable full editing control
Working groups

- Place for and individual or group to develop content
- Generally private, invitation only
- Separates working content from broadcast content
- Help prevent unwanted changes to broadcast content
Broadcast groups

- Place for finished content to be shared
  - Select members
  - Entire organization
  - Public
Broadcast groups

- Can seed:
  - Organization’s featured content (home page)
  - Open Data apps
  - Organization’s gallery
  - Gallery applications
New Groups page

- New featured groups tab
- New organization’s groups tab
- New membership request notifications
- Filter groups based on new memberships requests
New individual group page

- Latest content
- Same improved interface as Content page
- Members tab
  - Promote members to managers
  - List by date joined
- Settings tab
  - Manage properties
  - Delete protection
Demo
Finding items
Search within content page tabs
Advanced search

- Refine your search by searching specific fields in your string
Advanced search

- Refine your search by searching specific fields in your string
  - tags
Advanced search

- Refine your search by searching specific fields in your string
  - tags
  - title
Advanced search

- Refine your search by searching specific fields in your string
  - tags
  - title
  - owner

[Image of search results with example searches]
Advanced search

- Refine your search by searching specific fields in your string
  - tags
  - title
  - owner
  - description
Advanced search

- Refine your search by searching specific fields in your string
  - tags
  - title
  - owner
  - description
  - id
Advanced search

- Refine your search by searching specific fields in your string
  - tags
  - title
  - owner
  - description
  - Id
- Group fields
- Range searches
- Boolean operators
Advanced search
Boolean operators, grouping, and boosting

- Boolean operators allow you to combine terms
  - AND
  - OR
  - NOT

- Create subqueries using parentheses to group clauses

- Boost a term using the caret symbol (^) with a boost factor
Advanced search

Tips & tricks

• When doing a field search, use a colon (:) after the field name.
• Boolean operators must be in all caps (AND, OR, NOT).
• Use double quotation marks to surround terms with multiple words.
• Filter and sort your results.
Use the Map Viewer search

• Within map area – based on current map extent

• Choose where you want to search for layers
  - My Content
  - My Favorites
  - My Groups
  - My Organization
  - Living Atlas
  - ArcGIS Online
Conclusion
Key takeaways

• Keep ArcGIS Online sharing model in mind

• Tags are important and can be part of a larger strategy

• Organize your items in My Content

• Use groups to organize items, control access, and support project workflows

• Refine your searches in the keyword and Map Viewer search
Resources

- ArcGIS Online help

- ArcGIS Blog (Category: ArcGIS Online)

- Esri Training
  - Learn ArcGIS lessons

- Guides to help you Launch, Administer, and Promote your ArcGIS Online organization
## See Us Here

<table>
<thead>
<tr>
<th>WORKSHOP</th>
<th>LOCATION</th>
<th>TIME FRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ArcGIS Online: Administering Members in Your Organization</td>
<td>• Room 07 A/B</td>
<td>• 4:00 PM – 5:00 PM</td>
</tr>
<tr>
<td>• ArcGIS Online: Best Practices for High Demand Layers</td>
<td>• Room 16B</td>
<td>• 4:00 PM – 5:00 PM</td>
</tr>
</tbody>
</table>
It’s a process.
MAKE A PLAN. GET STARTED.
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”
Thank you!

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