

# Esri Pacific User Meeting CA / HI / NV

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## ArcGIS Online Steps to Success

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# Agenda

## *ArcGIS Online Steps to Success*

- ArcGIS Online introduction
  - Web GIS
  - How does it fit into the ArcGIS platform?
  - Desktop Entitlements
- Eight steps to success
  - How to get started with ArcGIS Online
  - Best practices and workflows

# Jack's Plenary Message



***“Web GIS is actually starting to transform everything we do. And who's leading it? You are.”***

<http://www.esri.com/events/user-conference>

# ArcGIS Is a Platform

Enabling Web GIS Everywhere



*Available in the Cloud and On-Premises*

# ArcGIS Online

*Delivering Web GIS throughout your Organization*

**Self-service**



**Content management**



**Groups**



**Built-in Security**

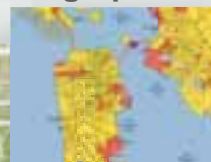


**Share**

**Maps for Office**



**Demographics**



**Basemap**



**Analytics**

**Ready to use  
web apps**



# ArcGIS Online Steps for Success



# ArcGIS Online Accounts

- Public Accounts
  - No charge
  - Personal use (or qualifying organizations)
  - Basic features and capabilities
- Organizational Account
  - Via subscription
  - Business / professional use
  - Full capabilities (website, publishing, access premium services, full experience)
  - Management framework and tools

# Establish The Vision and Governance

Cultivate and support your advocates.





# Vision & Governance

- What is the mission and vision?
  - What problems will it solve?
  - What are the deliverables?
  - Who is the audience?
- 
- Establish a **curator**, or **group of curators**
  - Form a **governance** committee

# Configure Your Site

Establish your presence and  
your brand



# Configuration & Settings

- URL and logo
- Home page (banner and background)
- Featured content (gallery ribbon)
- Gallery
- Map
- Security Settings



# Your Home Destination



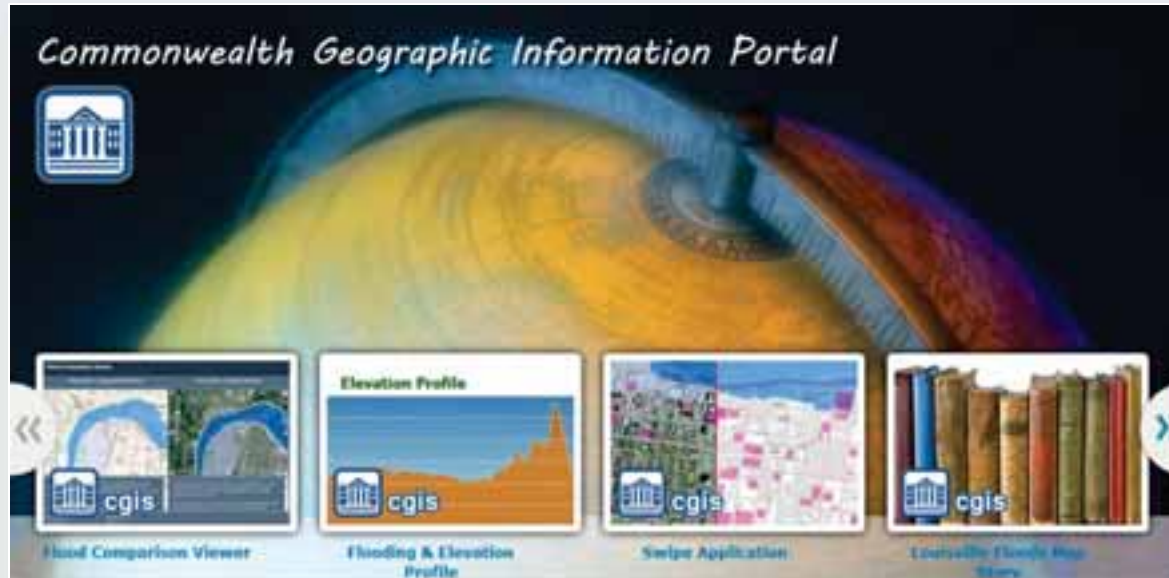
Public / Esri Home  
[arcgis.com/home](http://arcgis.com/home)



Your Organization  
[<org>.maps.arcgis.com](http://<org>.maps.arcgis.com)

**Not necessarily a public destination!**

# Organization Branding



Establish visual queues for your authoritative shared content

*Tip: ArcGIS Online for Local Government [resources](#)*

# Map Your Organization Using Groups

Tailor your organization to...  
your organization



# Organization or Project Chart



**Commonwealth App Templates**  
Application templates used by the Commonwealth.  
created by bwa2\_admin on January 6, 2012

[Details](#)

**Commonwealth Basemaps**  
Commonwealth Basemap Gallery  
created by bwa2\_admin on April 22, 2012

[Details](#)

**Commonwealth Collaboration Group**  
A group intended for sharing maps and apps with others outside the Commonwealth organizational members.  
created by bwa2\_admin on January 6, 2012

[Details](#)

**Commonwealth Featured Maps**  
Featured maps from the Commonwealth that appear on the portal ribbon gallery.  
created by bwa2\_admin on April 22, 2012

[Details](#)

**Commonwealth Gallery**  
Group containing layer featured on the Commonwealth Gallery.  
created by bwa2\_admin on April 9, 2012

[Details](#)

**Commonwealth Public Gallery**  
Public gallery maps for use in the public gallery template.  
created by bwa2\_admin on December 6, 2012


[Details](#)

**Current Priority Projects**  
A group supporting current priority project information and collaboration.  
created by bwa2\_admin on February 25, 2012

[Details](#)

# Groups are organization building blocks

- Consider
  - Consistent visual queues
  - Consistent naming convention
  - Well-documented
  - Color coded





### WDC Basemaps

Maps used in the basemap gallery for mem organization.

created by bws01\_admin on January 19, 20

[Details](#)







### WDC Portal Featured Maps

Featured maps that appear in the WDC portal ribbon gallery.

created by bws01\_admin on January 19, 20

[Details](#)





### National Maps for USA

This is a group formed by ESRI for use in sharing information about data, maps and services of interest to the Federal Community. The maps may be used as basemaps and operational layers to support a variety of applications. 📌

The group contains a set of web maps, map services, and layer packages that you can use in your web browser or download to your ArcGIS Desktop application. The group features map content from several leading government and commercial data providers, including:

- U.S. Geological Survey
- The National Map
- USDA Farm Services Agency
- NOAA National Weather Service
- U.S. Environmental Protection Agency
- National Geographic Society
- Tele Atlas, Inc.
- i-cubed
- ESRI



# Organize Useful Content

It's a portal after all...



# ArcGIS Online Content

- [What can you add to ArcGIS Online?](#)

# ArcGIS Services

Great documentation starts at the source



## Services Directory

# Authoring at the Desktop

Leverage the cloud when it makes sense

- Publish as hosted tile or feature services
- Must be a Publisher role in ArcGIS Online
- Authoring tips:
  - Use ArcGIS Online scale levels
  - Symbology
  - Document properties
  - Hide unnecessary fields
  - Use Aliases on fields

# Thumbnails



Geographic



Graphic



Organization  
Branding



Content

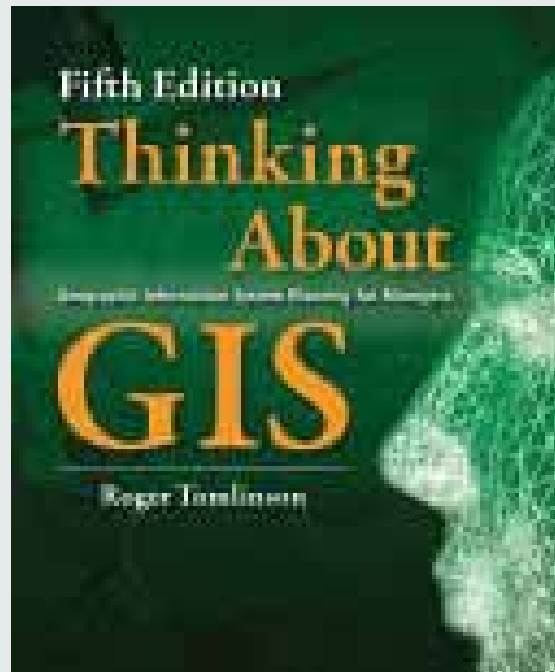
# Create Useful Information Products

Useful information supports your organization, and establishes value, support, and adoption.

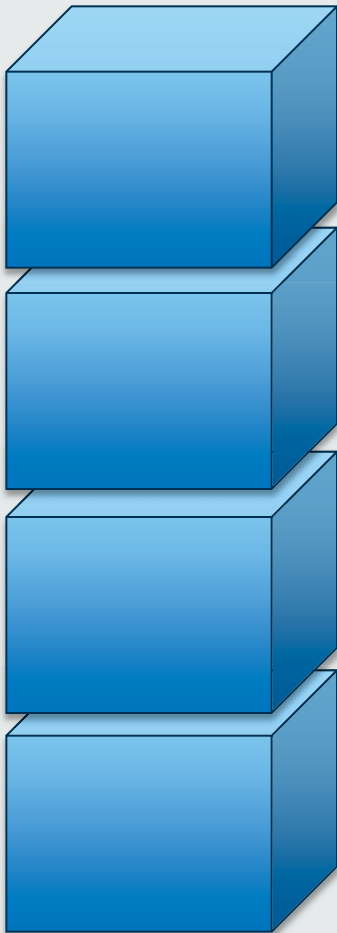


# What is an information product?

- A simple, focused **answer** to a business **problem** or question designed for ease-of-use for identified users or sets of users.



# Building blocks of an Information Product



**Title, Description, and Who will use it**

**Input requirements** (*Layers, data, symbology, basemap, attributes, popups...*)

**Delivery requirements** (*Story Map?, Mobile access?, Web app? Embedded web map?*)

**Workflow** (*Steps to create, Frequency of use*)



# ArcGIS Online Configurable Web Apps

- Easy to configure
- No programming
- Hosted
- Source download



# Best practices for Sharing

- Make “it” relevant
  - Meaningful name, description, date, ownership information...
  - Interesting thumbnails
  - Keep it simple and focused
  - Keep it timely
- Create meaningful Tags
  - Search made easy
  - Search [tips](#)
- Sharing consistency
  - Public, Organization, Group, Private

# Invite Users

Rollout your organization, and teach users your best practices



# Invite organizational members

**Invite Users to Bern's Maps & Apps**

**Step 1 of 3**  
How would you like to invite users to your organization?


☒ Pre-establish logins for the users to be invited

☐ Have invited users join using either their existing logins or by creating their own logins

[Next](#)

Invite users via pre-established logins (recommended)  
or by using existing account

**Enterprise Logins (Beta)**



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](#)

Enterprise logins

# Roles in the Organization

	User	Publisher	Administrator
Add items	✓	✓	✓
Create web maps	✓	✓	✓
Share content	✓	✓	✓
Participate in groups	✓	✓	✓
Publish hosted services		✓	✓
Customize Site			✓
Manage the organization & other users			✓

# Organization Persona

*Establish organization persona for authoritative shared content*



### Joseph Field

This user has not provided any personal information.



### Matt Crossett

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### Esri, Inc.

Esri develops geographic information systems (GIS) solutions that function as an integral component in nearly every type of organization. On any given day, more than a million people around the world use Esri's GIS to improve the way their organizations conduct business. Esri is headquartered in Redlands, California, and maintains offices throughout the United States.

[Profile](#) [Items](#) [Groups](#)

# Integrate With Other Business Systems

Your value is contingent upon how you integrate with existing systems, processes, workflows.



# Esri Maps for Office

Support Office workflows and users





# Extend your reach through apps



# Promote Your Organization

Evangelize and promote your value using real examples and real value propositions.



# Your Challenge

- Follow these steps for success
- Think outside the box...but don't overthink it!
  - Simple, focused information products are popular
  - Use Analysis, e.g. from the Desktop and share the result as an information products
- Start at the top of the Organization
- Build a rollout plan that works for your Organization

# Additional Resources

- ArcGIS Resource Center
  - [Help](#)
  - [Blogs](#)
  - [Forums](#)
- Training Videos
  - [Many ArcGIS Online resources](#)



**Questions?**