




Using Custom Roles to Reflect Your Organization

Matt Kennedy

Agenda


- Identity is important
- Esri default roles
- Creating custom roles
- Custom role scenarios




CREATE ROLE

Role Name	Members	
Administrator	6	i
Publisher	0	i
User	2	i


Workshop	In order to...	You need privileges to....
	Use the analysis tools	Create content, publish features, and use spatial analysis. Some tools require privileges to use GeoEnrichment or network analysis.
		Create content, publish hosted feature layers, and use geocoding (to publish CSV with addresses).
		Create content and publish hosted tile layers.
	or group page	Create content and share items (with groups, organization, or public).
		Create content and share items with public.
	s	View all member account info, view content, update content, delete content, and reassign content.
	s	View all member account info, view group, update group, reassign group, delete group, and add member to group.
		View all member account info and update member account info.
	ta sites	Make groups visible to public and make groups available to Open Data.
		View all member account info, view all content, and view all groups.
	hosted feature layers that	Edit features and edit with full control.
	date only	





1 Define a custom role with privileges



2 Assign to an account



3 Verify your desired privileges

Role privileges

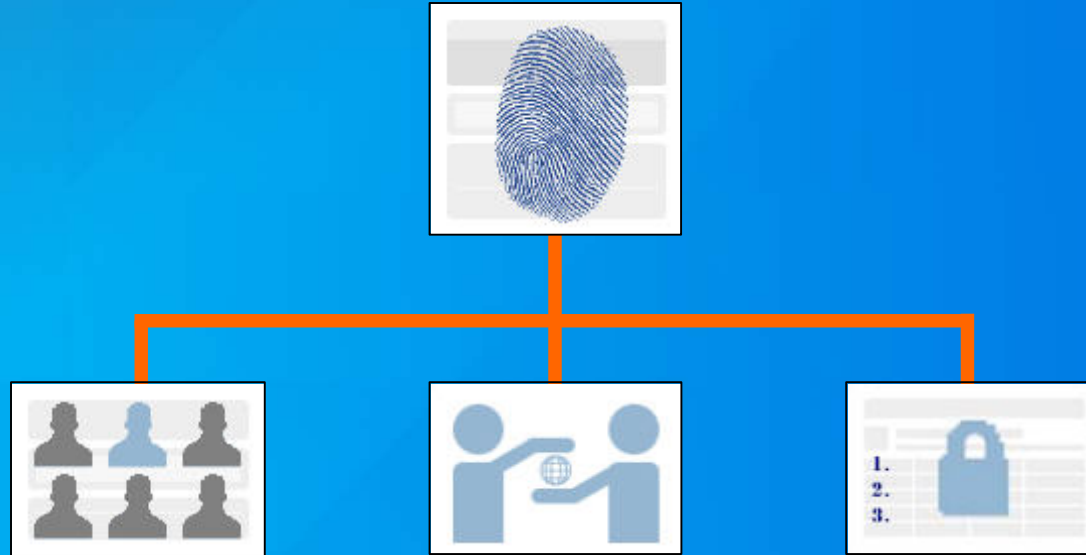
Privilege	User	Publisher	Administrator	Custom
Use maps and apps	✓	✓	✓	✓
Create content	✓	✓	✓	Optional
Share maps and apps	✓	✓	✓	Optional
Join and create groups	✓	✓	✓	Optional
Edit features	✓	✓	✓	Optional
Publish hosted web layers		✓	✓	Optional
Perform analysis		✓	✓	Optional
Manage Open Data sites			✓	Optional
Invite users to organization			✓	Optional
Manage organization resources			✓	Optional
View subscription status			✓	Optional
Configure website			✓	
Create custom roles			✓	
ArcGIS Marketplace provider (requires organization authorization)			✓	

The background features a vibrant blue gradient. On the left side, there are several overlapping geometric shapes: a large purple triangle pointing upwards, a yellow triangle pointing downwards, and a dark purple triangle pointing downwards. The yellow triangle contains a faint, light-colored map of a region, possibly a county or state boundary. The overall composition is modern and abstract.

Identity is important

Identity is key to an effective organization

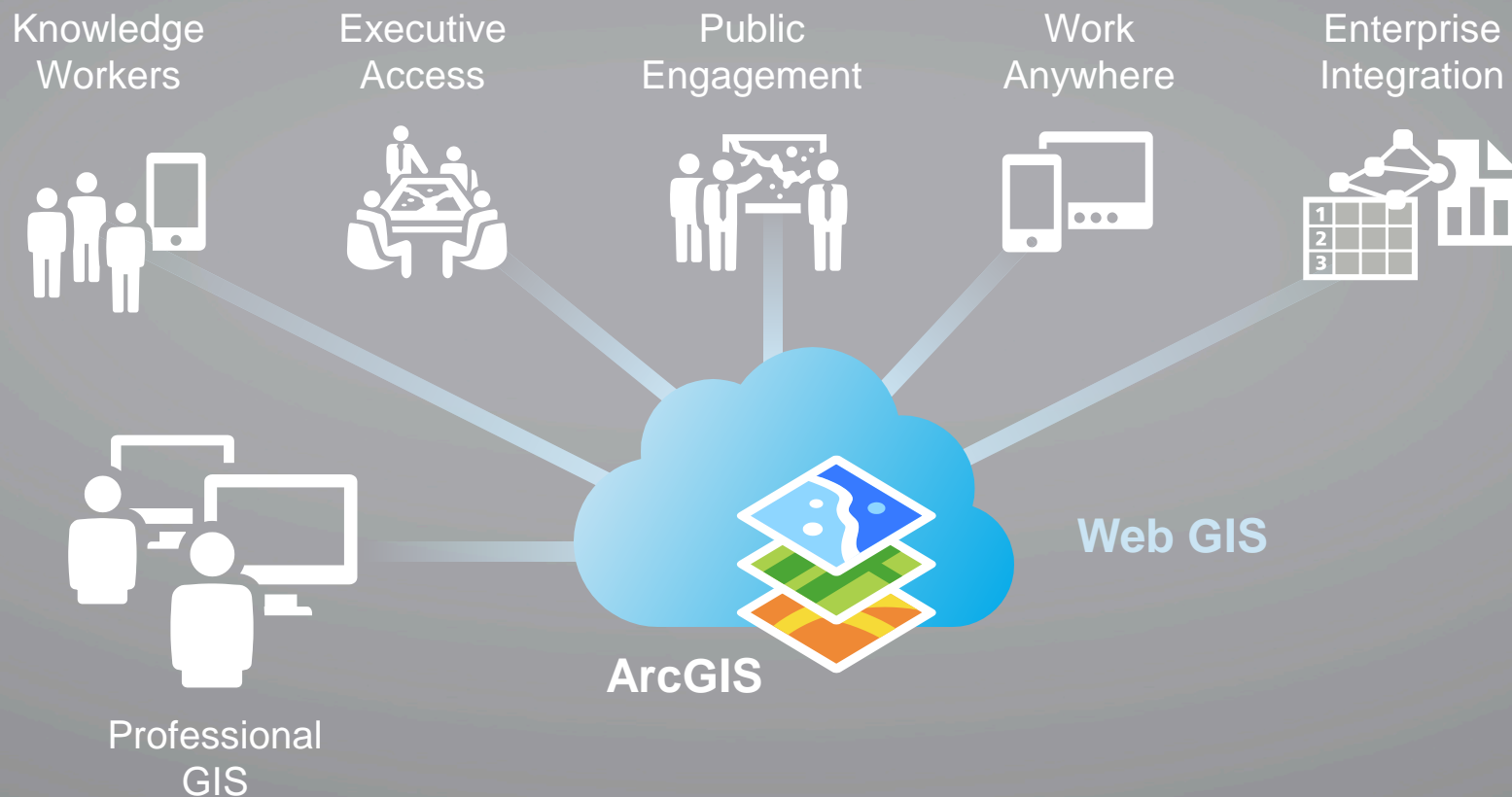
- Keep data secure
- Allow members to work
- Permit collaboration
- Maintain efficiency



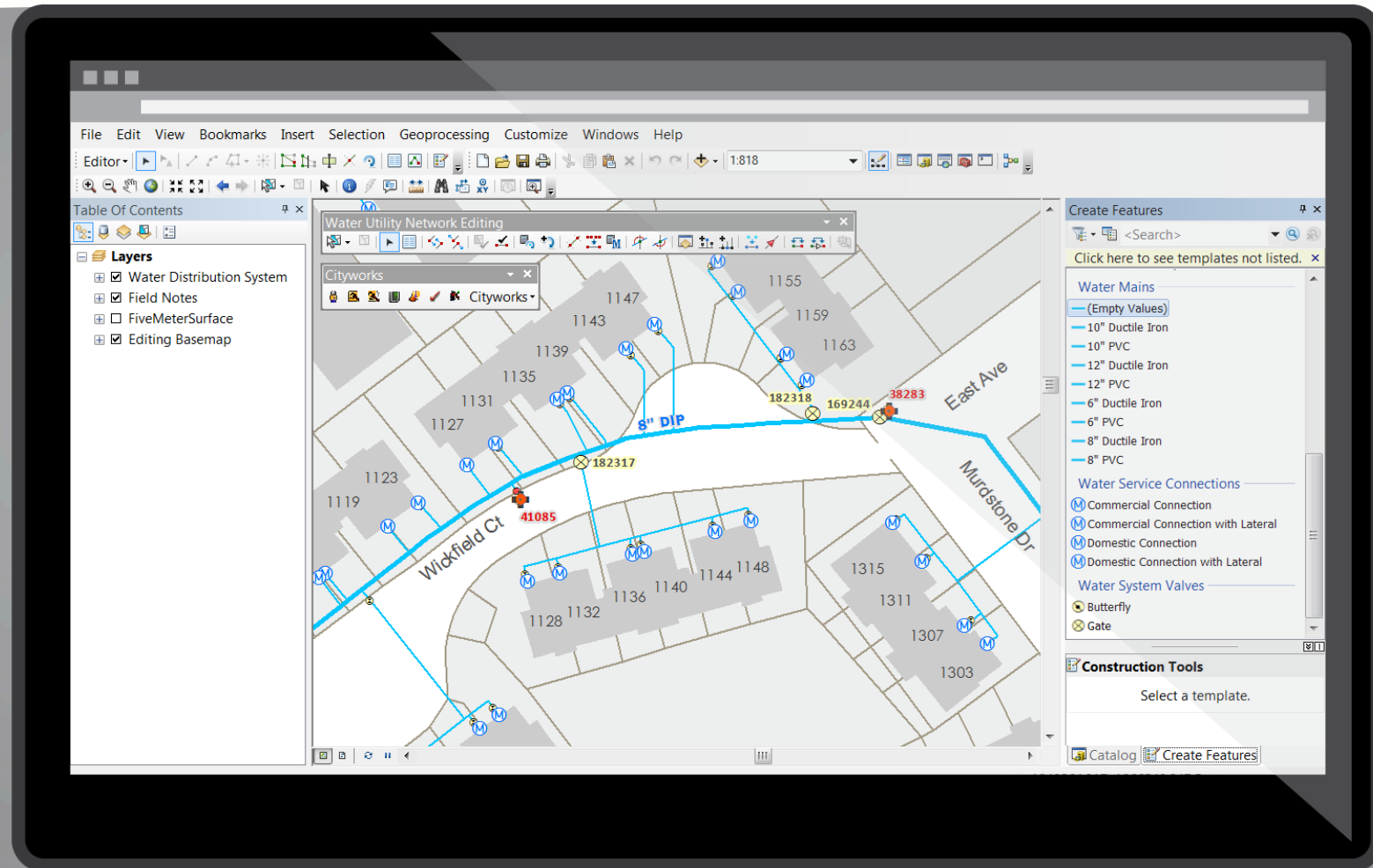
Establish control while allowing the freedom to accomplish tasks efficiently

ArcGIS is a Platform

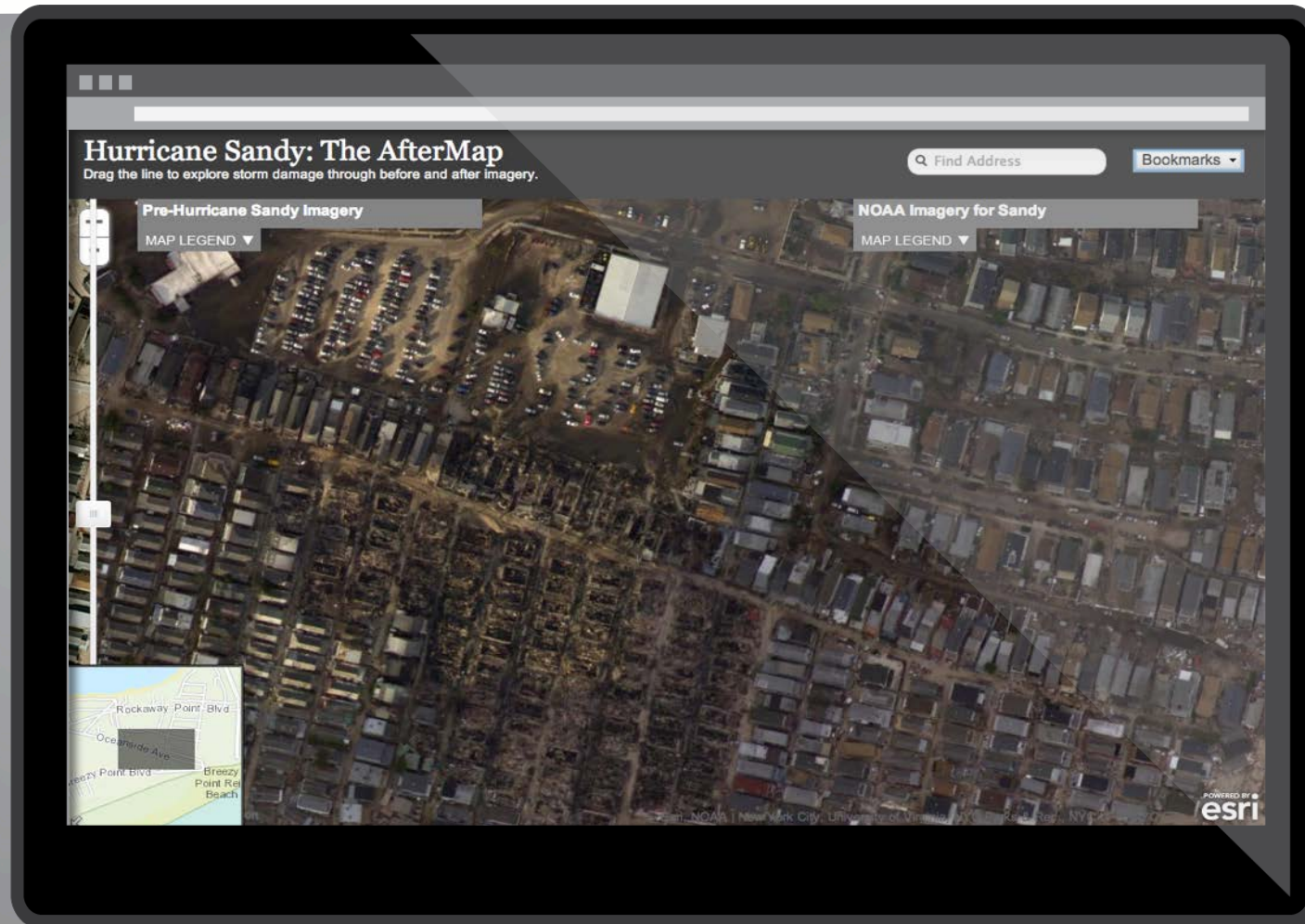
► Making mapping and location aware apps available across your organization



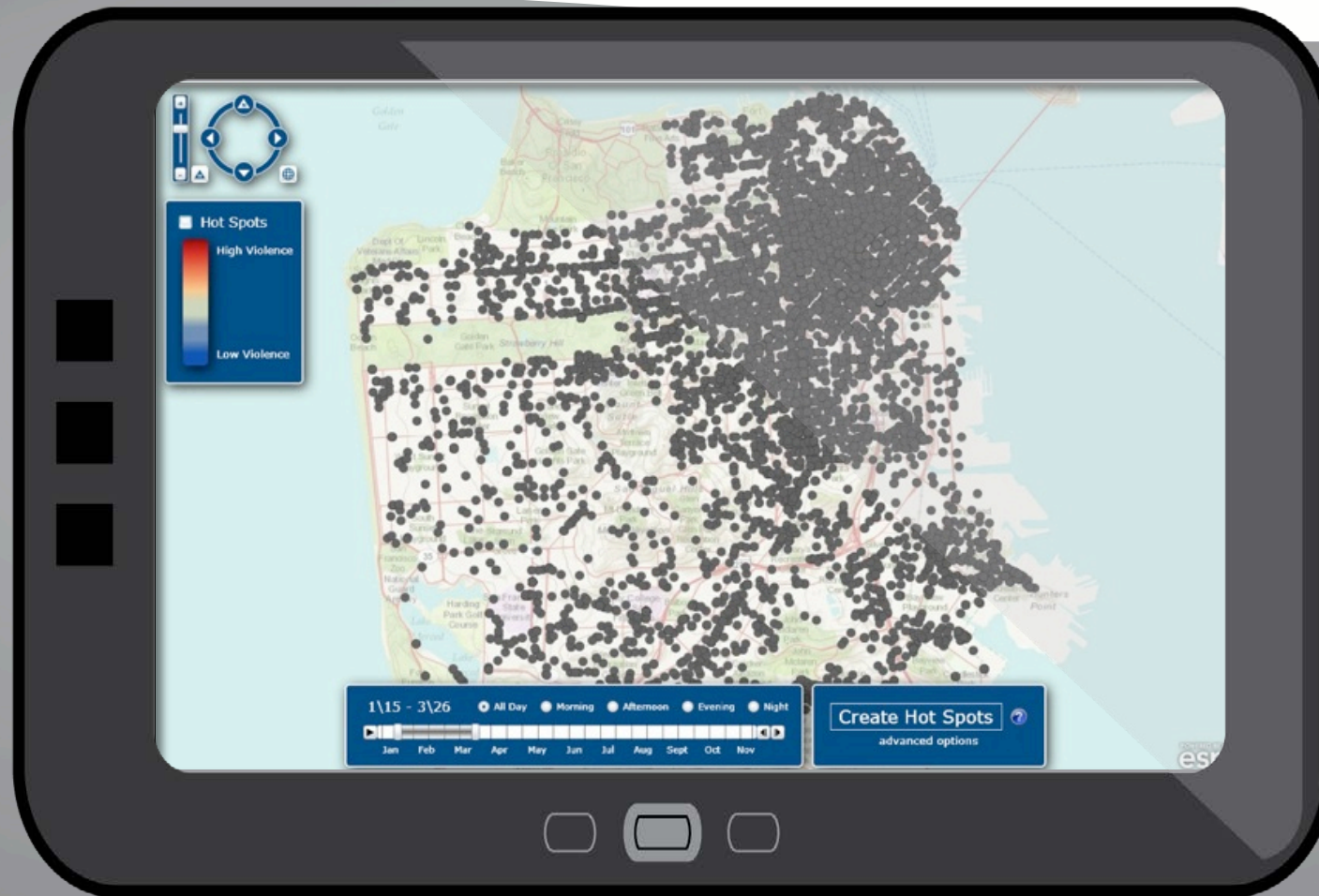
Maps at Work ▶ Represent the authoritative inventory of your assets and resources



Maps at Work ▶ Enable you to quickly see changes that impact your business



Maps at Work ▶ Reveal patterns and trends in your data that brings new insight

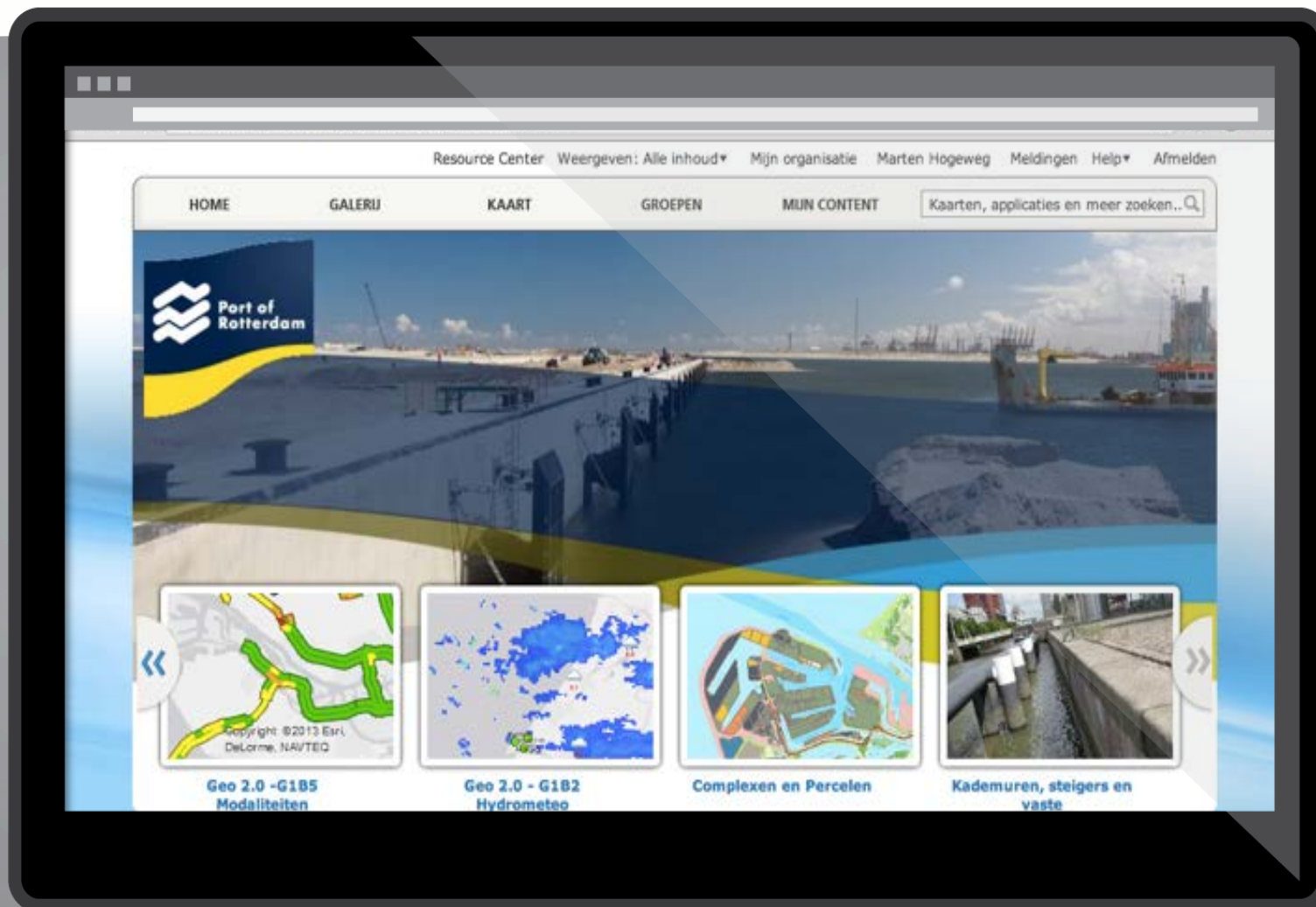


Maps at Work ▶ Illustrate time, show status and performance, and support decision making



Maps at Work

► Provide a destination where your employees go for maps and authoritative knowledge about your assets and resources



Identity ▶ Your “key” to accessing the ArcGIS Platform wherever you are



ACCESS	● ● ● ○ ○
SECURITIES	● ● ○ ○ ○
CAPABILITIES	● ● ● ○ ○



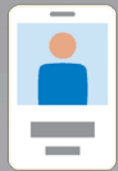
Kristin
Human Resources

Collaboration ▶ Enable people to work together by securely sharing data, apps, and knowledge



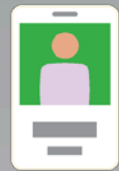
Naveen
Executive

ACCESS ●●●●○
SECURITIES ●●●○○
CAPABILITIES ●●●●●



Meghan
IT

ACCESS ●●●●○
SECURITIES ●●●○○
CAPABILITIES ●●●○○



Manny
Accounting

ACCESS ●●●●○
SECURITIES ●●●●●
CAPABILITIES ●●●●○



David
Field
Ops

ACCESS ●●●●●
SECURITIES ●●●○○
CAPABILITIES ●●●●○



Kristin
Human
Resources

ACCESS ●●●○○
SECURITIES ●●○○○
CAPABILITIES ●●●○○



The background features a vibrant blue gradient. On the left side, there are several overlapping geometric shapes: a large purple triangle pointing upwards, a yellow triangle pointing downwards, and a dark purple triangle pointing downwards. The yellow triangle contains a faint, light-colored map of a region, possibly a county or state map. The word "Roles" is centered in the blue area.

Roles

Roles

- Collection of privileges
- Assigned to organization members
- Control access to actions and resources
- Esri default roles:
 - User
 - Publisher
 - Administrator

Privilege	User	Publisher	Administrator
Use maps and apps	✓	✓	✓
Use subscriber content	✓	✓	✓
Use premium content	✓	✓	✓
Create content	✓	✓	✓
Share maps and apps	✓	✓	✓
Join and create groups	✓	✓	✓
Edit features	✓	✓	✓
Publish hosted web layers		✓	✓
Perform analysis		✓	✓
Manage Open Data sites			✓
Invite users to organization			✓
Manage organization resources			✓
View subscription status			✓
Configure website			✓
Create custom roles			✓
ArcGIS Marketplace provider (requires organization authorization)			✓

Scale of Privileges - User

- Create & join groups
- Create maps
- Share items
- Use premium content
- Edit

User

Increasing capability

The diagram features a red triangle that starts narrow on the left and widens towards the right, symbolizing growth or increasing capability. Above the left side of the triangle is a blue box containing a list of five privileges. A white arrow points from the bottom of this box down to the word 'User' on the triangle's surface. Below the triangle is a thick grey arrow pointing to the right, with the text 'Increasing capability' centered within it.

Scale of Privileges - Publisher

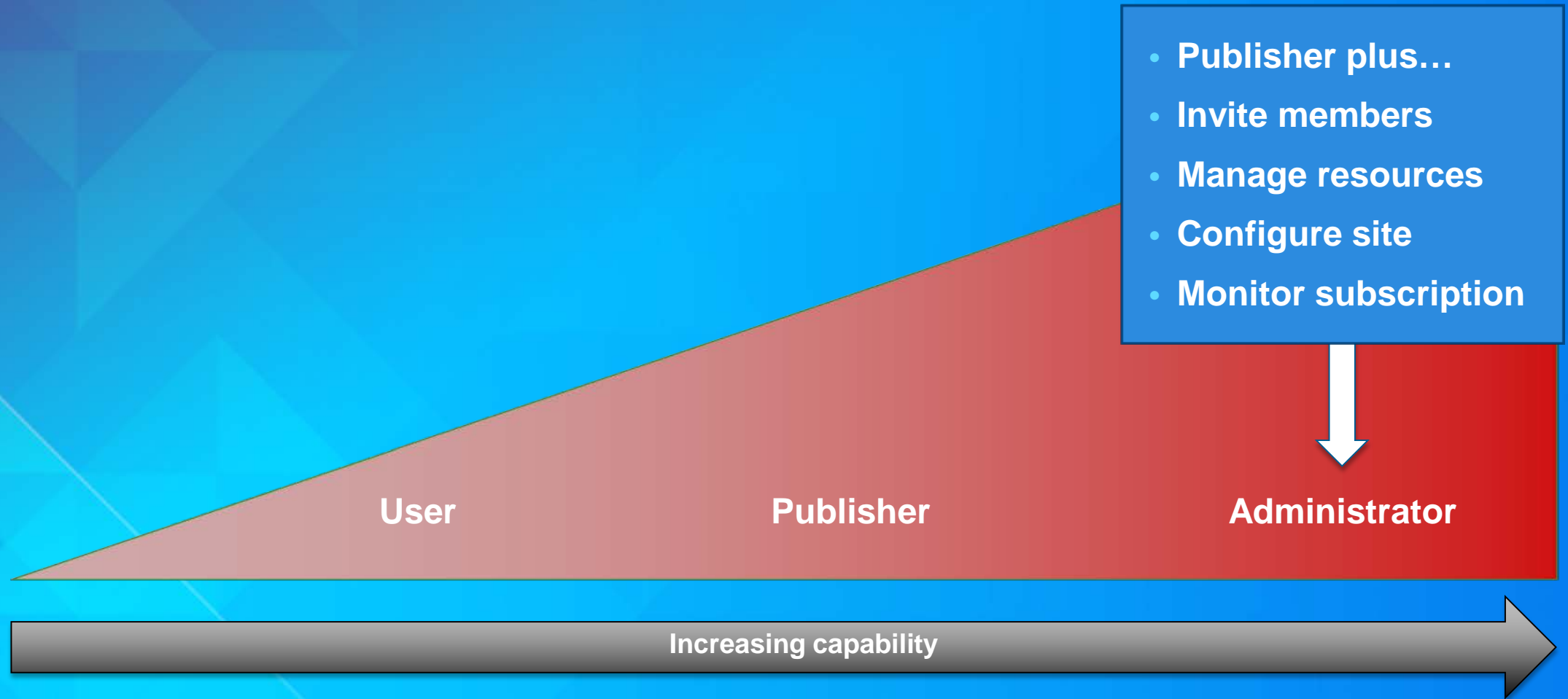
- User privileges plus...
- Publish services
 - Hosted features
 - Hosted tiles
- Analysis

User

Publisher

Increasing capability

Scale of Privileges - Administrator



Common workflows

Workflows often require a combination of privileges

In order to...	You need privileges to....
Use the analysis tools	Create content, publish features, and use spatial analysis. Some tools require privileges to use GeoEnrichment or network analysis.
Publish hosted feature layers	Create content, publish hosted feature layers, and use geocoding (to publish CSV with addresses).
Publish hosted tile layers	Create content and publish hosted tile layers.
Publish apps from the map viewer or group page	Create content and share items (with groups, organization, or public).
Embed maps or groups	Create content and share items with public.
Manage content owned by members	View all member account info, view content, update content, delete content, and reassign content.
Manage groups owned by members	View all member account info, view group, update group, reassign group, delete group, and add member to group.
Manage member profiles	View all member account info and update member account info.
Make groups available to Open Data sites	Make groups visible to public and make groups available to Open Data.
View subscription status	View all member account info, view all content, and view all groups.
Add, update, and delete features in hosted feature layers that have editing enabled for add or update only	Edit features and edit with full control.

Read this chart online at <http://doc.arcgis.com/en/arcgis-online/reference/roles.htm>



Custom Roles

Custom roles

Fine-grained privileges

- Created by administrators
- Define detailed privileges
- Fit business needs

General Privileges		
<input type="checkbox"/> [-] Groups	<input type="checkbox"/> [-] Content	<input type="checkbox"/> [-] Sharing
<input type="checkbox"/> Create, update, and delete	<input type="checkbox"/> Create, update, and delete	<input type="checkbox"/> Share with groups
<input checked="" type="checkbox"/> Join organizational groups	<input type="checkbox"/> Publish hosted feature layers	<input type="checkbox"/> Share with organization
<input type="checkbox"/> Join external groups	<input type="checkbox"/> Publish hosted tile layers	<input type="checkbox"/> Share with public
		<input type="checkbox"/> Make groups visible to organization
		<input type="checkbox"/> Make groups visible to public
		<input type="checkbox"/> Make groups available to Open Data
<input type="checkbox"/> [-] Premium Content	<input type="checkbox"/> [-] Features	<input type="checkbox"/> [-] Open Data
<input checked="" type="checkbox"/> Geocoding	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Manage Open Data site(s)
<input type="checkbox"/> Network Analysis	<input type="checkbox"/> Edit with full control	
<input type="checkbox"/> Spatial Analysis		
<input type="checkbox"/> GeoEnrichment		
<input type="checkbox"/> Demographics		
<input type="checkbox"/> Elevation Analysis		
Administrative Privileges		
<input type="checkbox"/> [-] Members	<input type="checkbox"/> [-] Groups	<input type="checkbox"/> [-] Content
<input type="checkbox"/> View all	<input type="checkbox"/> View all	<input type="checkbox"/> View all
<input type="checkbox"/> Update	<input type="checkbox"/> Update	<input type="checkbox"/> Update
<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete
<input type="checkbox"/> Invite	<input type="checkbox"/> Reassign ownership	<input type="checkbox"/> Reassign ownership
<input type="checkbox"/> Disable	<input type="checkbox"/> Assign members	
<input type="checkbox"/> Change roles		
<input type="checkbox"/> Manage licenses		
<input type="checkbox"/> [-] ArcGIS Marketplace Subscriptions		
<input type="checkbox"/> Request purchase		
<input type="checkbox"/> Start trials		

Custom roles make it easier to administer, manage, and control what users can do in an organization

Custom roles

Fine-grained privileges

- Created by administrators
- Define detailed privileges
- Fit business needs

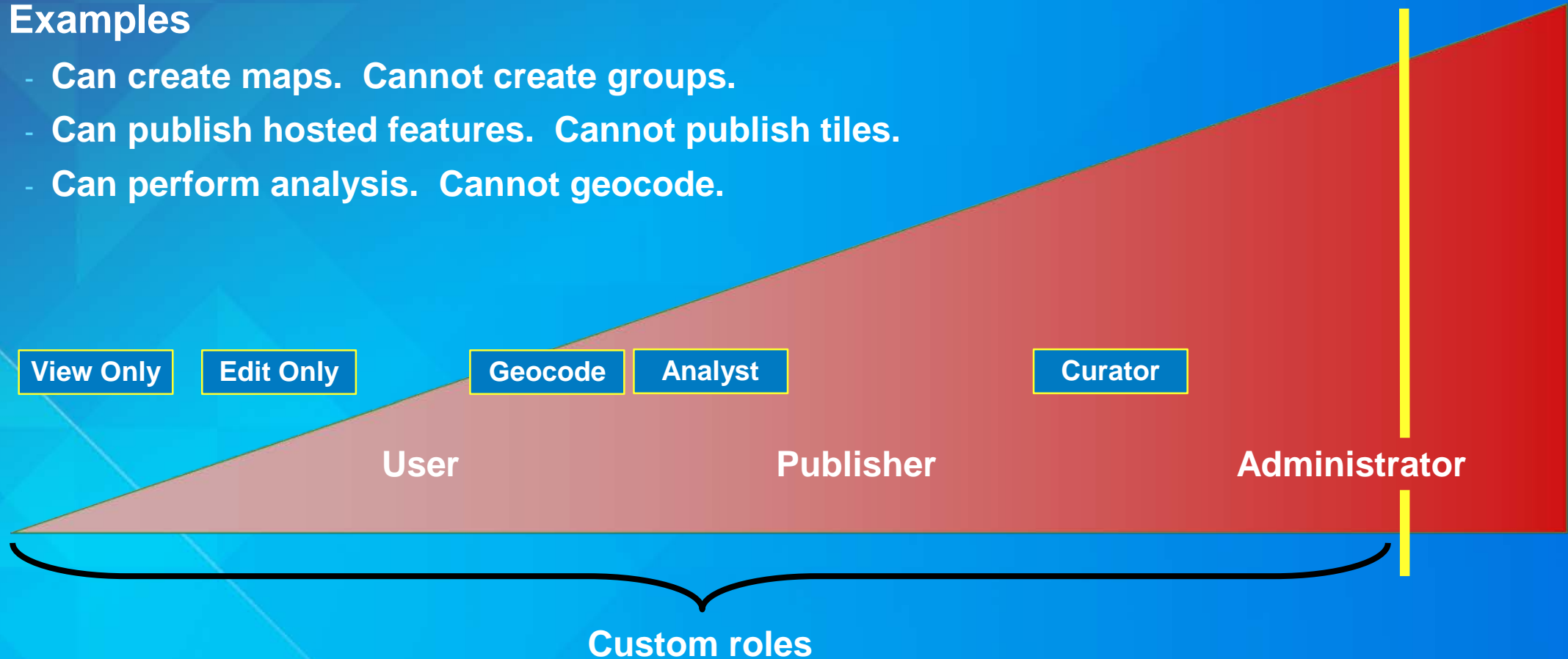
General Privileges		
<p>[-] <input type="checkbox"/> Groups</p> <p><input type="checkbox"/> Create, update, and delete</p> <p><input checked="" type="checkbox"/> Join organizational groups</p> <p><input checked="" type="checkbox"/> Join external groups</p>	<p>[-] <input type="checkbox"/> Content</p> <p><input checked="" type="checkbox"/> Create, update, and delete</p> <p><input checked="" type="checkbox"/> Publish hosted feature layers</p> <p><input type="checkbox"/> Publish hosted tile layers</p>	<p>[-] <input type="checkbox"/> Sharing</p> <p><input checked="" type="checkbox"/> Share with groups</p> <p><input checked="" type="checkbox"/> Share with organization</p> <p><input type="checkbox"/> Share with public</p> <p><input type="checkbox"/> Make groups visible to organization</p> <p><input type="checkbox"/> Make groups visible to public</p> <p><input type="checkbox"/> Make groups available to Open Data</p>
<p>[-] <input checked="" type="checkbox"/> Premium Content</p> <p><input checked="" type="checkbox"/> Geocoding</p> <p><input checked="" type="checkbox"/> Network Analysis</p> <p><input checked="" type="checkbox"/> Spatial Analysis</p> <p><input checked="" type="checkbox"/> GeoEnrichment</p> <p><input checked="" type="checkbox"/> Demographics</p> <p><input checked="" type="checkbox"/> Elevation Analysis</p>	<p>[-] <input type="checkbox"/> Features</p> <p><input checked="" type="checkbox"/> Edit</p> <p><input type="checkbox"/> Edit with full control</p>	<p>[-] <input type="checkbox"/> Open Data</p> <p><input type="checkbox"/> Manage Open Data site(s)</p>
Administrative Privileges		
<p>[-] <input type="checkbox"/> Members</p> <p><input type="checkbox"/> View all</p> <p><input type="checkbox"/> Update</p> <p><input type="checkbox"/> Delete</p> <p><input type="checkbox"/> Invite</p> <p><input type="checkbox"/> Disable</p> <p><input type="checkbox"/> Change roles</p> <p><input type="checkbox"/> Manage licenses</p>	<p>[-] <input type="checkbox"/> Groups</p> <p><input type="checkbox"/> View all</p> <p><input type="checkbox"/> Update</p> <p><input type="checkbox"/> Delete</p> <p><input type="checkbox"/> Reassign ownership</p> <p><input type="checkbox"/> Assign members</p>	<p>[-] <input type="checkbox"/> Content</p> <p><input type="checkbox"/> View all</p> <p><input type="checkbox"/> Update</p> <p><input type="checkbox"/> Delete</p> <p><input type="checkbox"/> Reassign ownership</p>
<p>[-] <input type="checkbox"/> ArcGIS Marketplace Subscriptions</p> <p><input type="checkbox"/> Request purchase</p> <p><input type="checkbox"/> Start trials</p>		

Custom roles make it easier to administer, manage, and control what users can do in an organization

Scale of Privileges - Custom Roles

- **Examples**

- Can create maps. Cannot create groups.
- Can publish hosted features. Cannot publish tiles.
- Can perform analysis. Cannot geocode.



Administrative privileges

Actions that can be added to a custom role

1. Invite members
2. Manage resources
3. View subscription status
4. Manage Open Data sites

The screenshot displays the Open Data portal interface. At the top, there are navigation links for 'Open Data', 'About', and 'Forums'. Below this is a map of Philadelphia with blue dots representing data points. A search bar and zoom controls are visible. On the right, a 'Role' dropdown menu is open, showing a list of roles and their associated actions. The 'User' role is selected, and the actions listed are: Manage Items, View Groups, View Profile, Reset Password, Enable Esri Access, Disable Member, and Delete Member.

The main content area shows a 'Schools' section with a 'Details' tab selected. Below this is a 'DESCRIPTION' section with a 'Summary' section. The 'Summary' section contains the text: 'The point locations of Philadelphia.' and 'Features updated: 07/19/2015'.

The 'Members' tab is selected, showing a report for the period '8/1/2014, 00:00 GMT -- 7/15/2015, 19:47 GMT'. The report includes a pie chart titled 'Members By Role and Credit Usage' and a table of member details.

Member	Role	Credit Usage	Last Login
Matt Kennedy	Administrator	230.88	7/14/2015
Ben Banks	Author	151.11	7/14/2015
Rita Yates	Administrator	136.82	7/7/2015
Evelyn Parsons	Workshop Publish...	128.69	6/15/2015
Brent Byrne	Workshop Publish...	116.80	6/15/2015
Leon Bender	Workshop Publish...	109.81	6/15/2015
Dave Crow	Workshop Publish...	98.97	6/15/2015

Below the table is a 'Utilization Summary and Statistics for Matt Kennedy' section. It includes a profile picture and the following statistics:

Total Items Created or Modified This Period	Total Credits Used This Period	Member Since	Groups In
322	230.88	9/4/2012	33

At the bottom of the page, there are two buttons: 'INVITE ANOTHER' and 'REVIEW INVITATION(S)'. The 'REVIEW INVITATION(S)' button is highlighted.

Reserved privileges

Actions only administrators can perform

1. Create custom roles
2. Promote / demote administrators
3. Configure the site
4. Manage enterprise logins
5. Move member content
6. Force password reset
7. Override public sharing
8. Sell in ArcGIS Marketplace

SET IDENTITY PROVIDER

GET SERVICE PROVIDER

 EDIT SETTINGS





Scenarios

Demonstration

Final thoughts

- Use templates to get started
- Think about the business
- Test before deploying
- Enable everyone

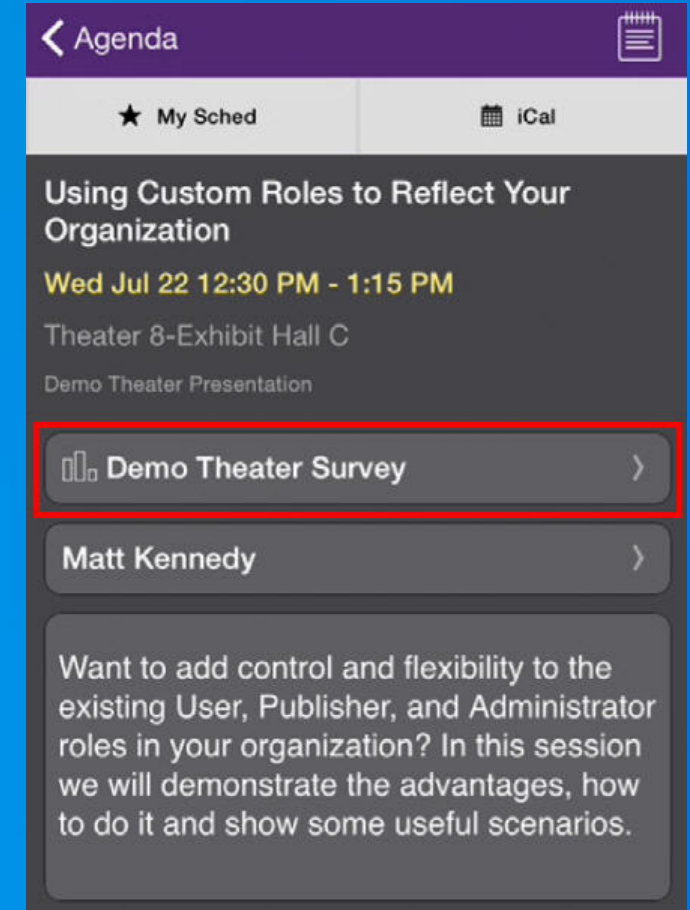


Want to learn more?

- **Documentation on Roles**
 - <http://doc.arcgis.com/en/arcgis-online/administer/configure-roles.htm>
 - <http://doc.arcgis.com/en/arcgis-online/reference/roles.htm>
- **Other UC Sessions on ArcGIS Online Administration**
 - ***ArcGIS Online: Administering through Scripting***
 - Wednesday 1:30 – 2:45, Room 04
 - ***Using Your Own Authentication System with ArcGIS Online***
 - Wednesday 4:30 – 5:15, Demo Theater 8 – Online GIS
 - ***Configure and Manage an ArcGIS Online Organization***
 - Thursday 9:30 – 10:15, Demo Theater 8 – Online GIS
 - ***ArcGIS Online: Managing Data***
 - Thursday 1:30 – 2:45, Room 14 B
 - ***ArcGIS Online: The Mapping Platform for Your Organization***
 - Thursday 3:15 – 4:30, Ballroom 06 D

Thank you...

- Please fill out the session survey in your mobile app
- Search ***Using Custom Roles to Reflect Your Organization***
 - Use the Search Feature to quickly find this title
- Click “Demo Theater Survey”
- Answer a few short questions and enter any comments





Understanding our world.