

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



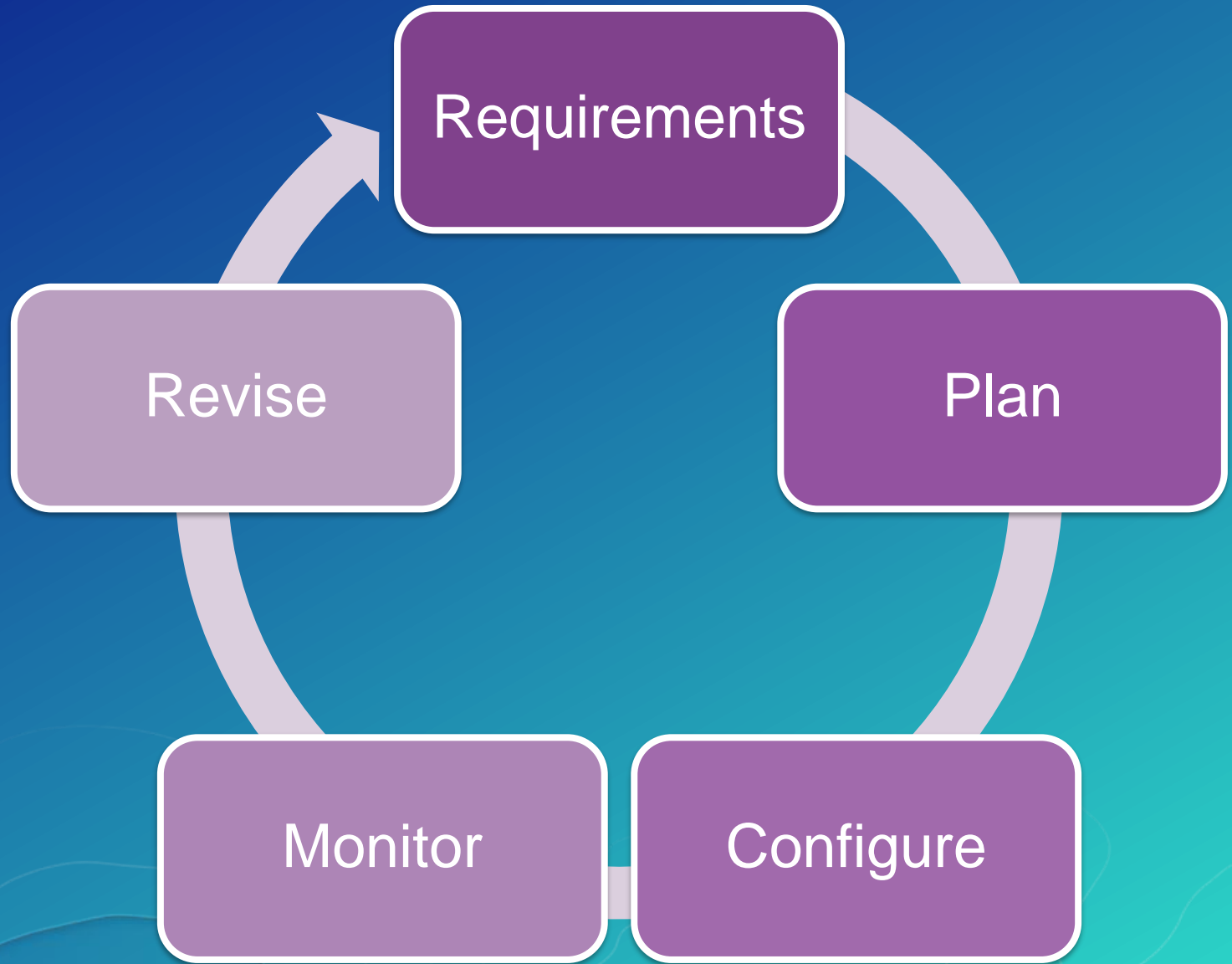
Understanding your Administrative Needs

Kelly



Membership Lifecycle

Understanding your Administrative Needs



ArcGIS Online Features

Requirements| Understanding your Administrative Needs



Sharing

Requirements| Understanding your Administrative Needs

Private



Sharing

Requirements| Understanding your Administrative Needs

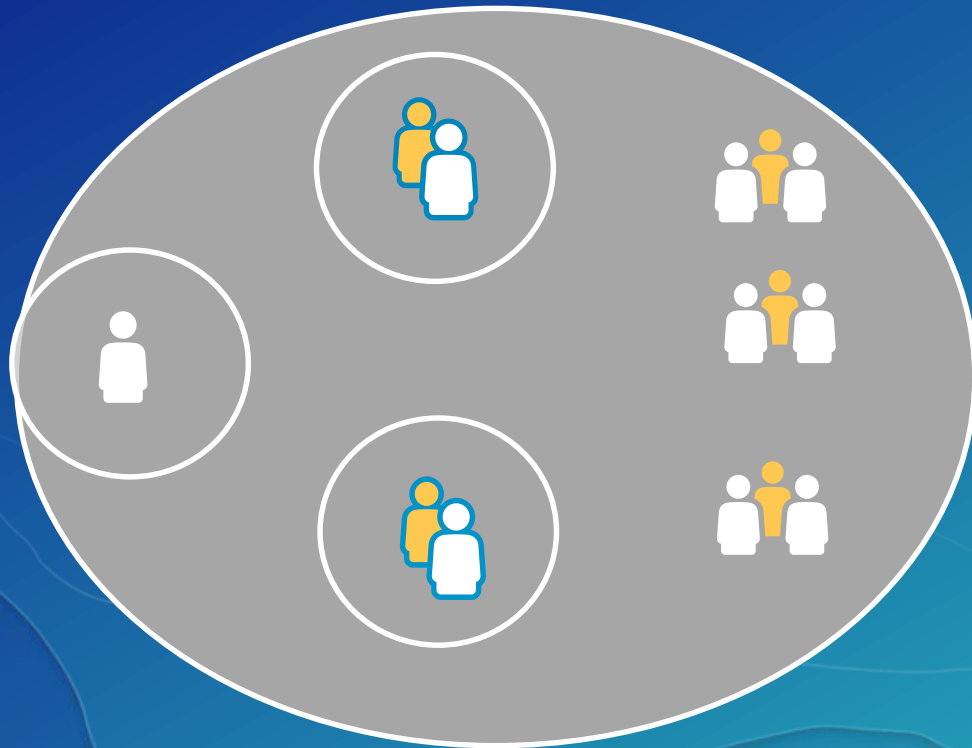
Groups



Sharing

Requirements| Understanding your Administrative Needs

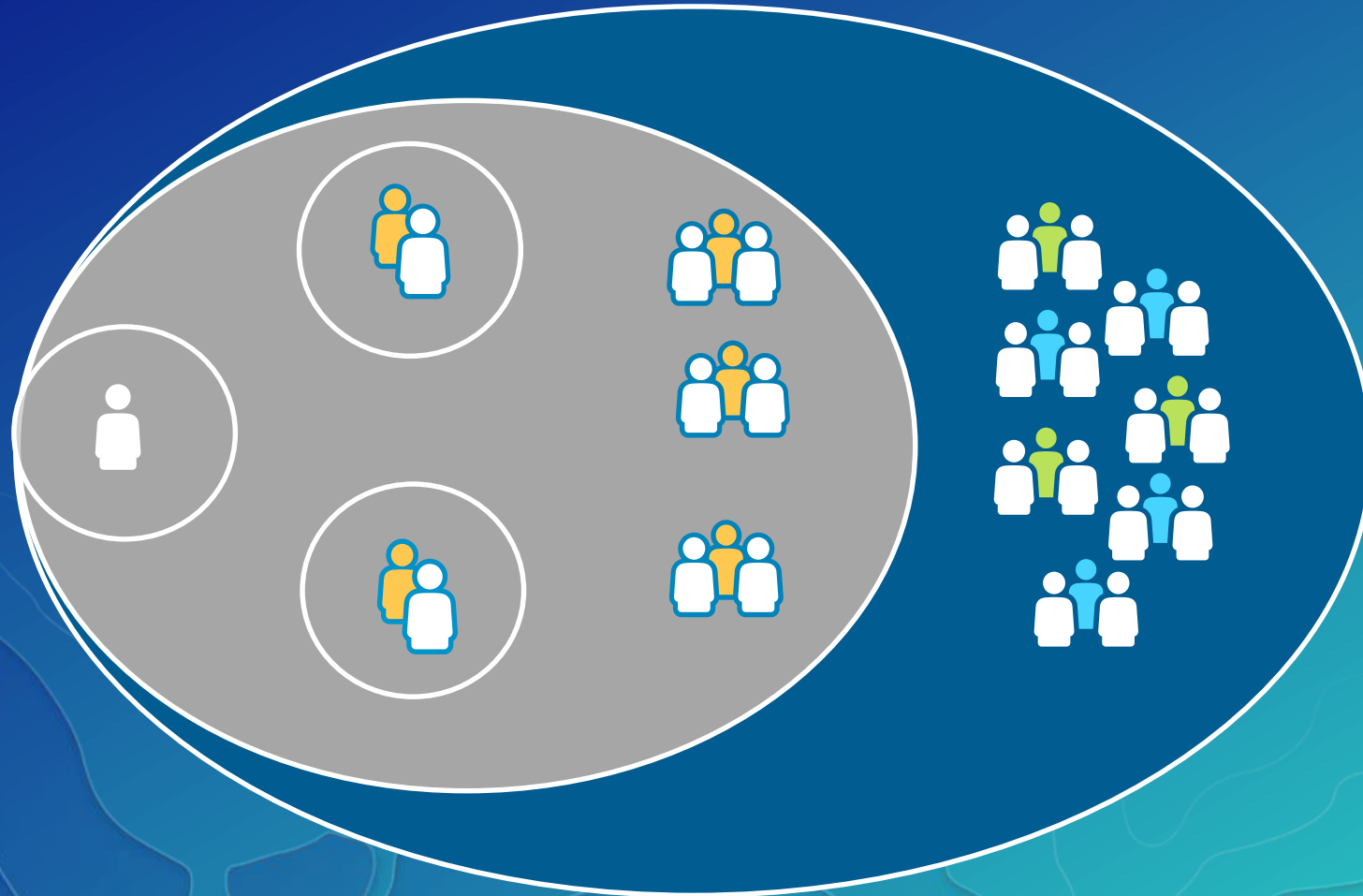
Organization



ArcGIS Online Features| Sharing

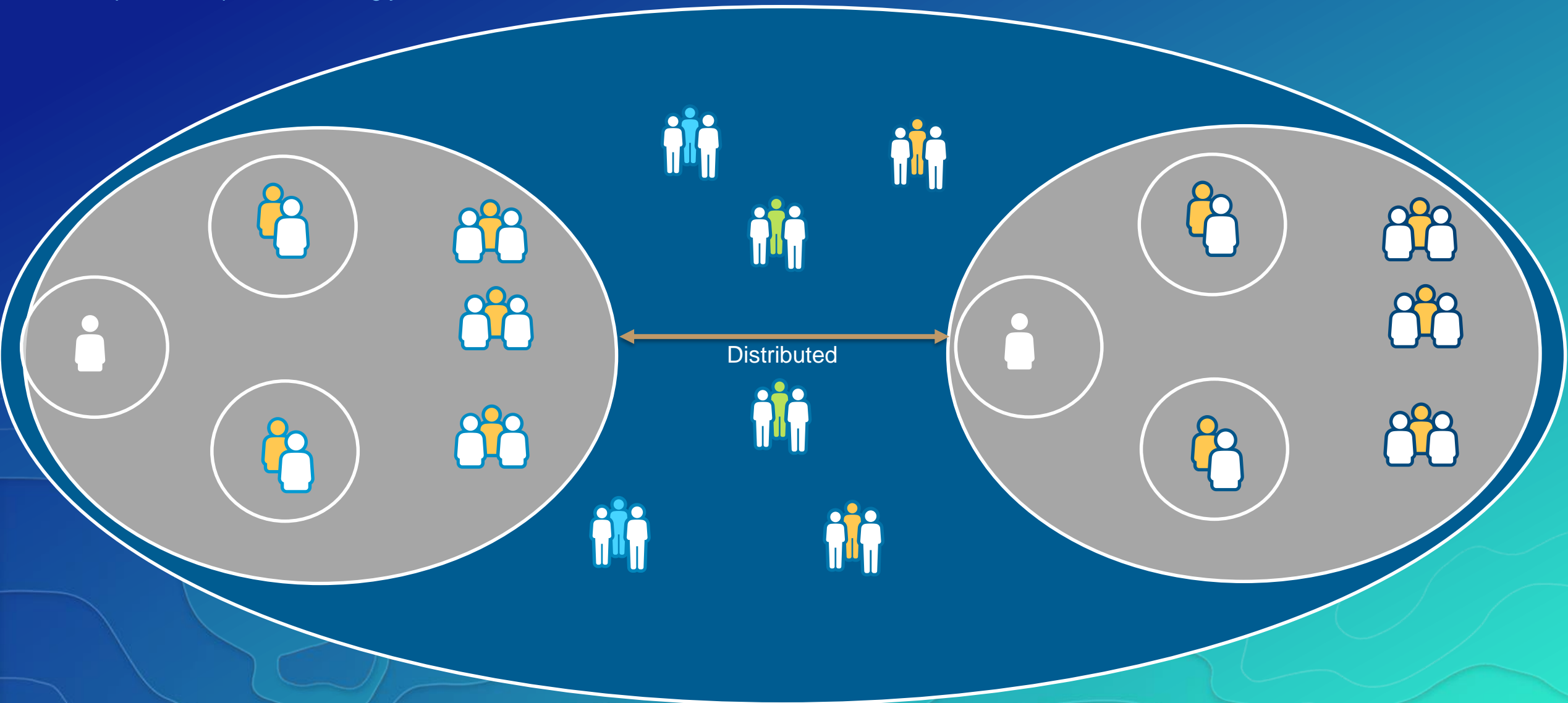
Requirements| Understanding your Administrative Needs

Everyone



Sharing

Requirements| Understanding your Administrative Needs



Members

Requirements| Understanding your Administrative Needs

Who are your Members?



Access and Security

Requirements| Understanding your Administrative Needs

Policies



- ☐ Allow access to the organization through HTTPS only.
- ☒ 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
- ☐ Create with update capabilities

[-] ☒ Content

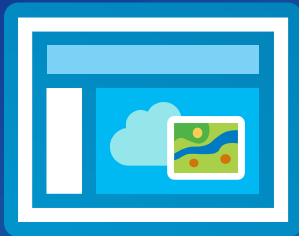
- ☒ View all
- ☒ Update
- ☒ Delete
- ☒ Reassign ownership

Apps and Workflow

Requirements| Understanding your Administrative Needs

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



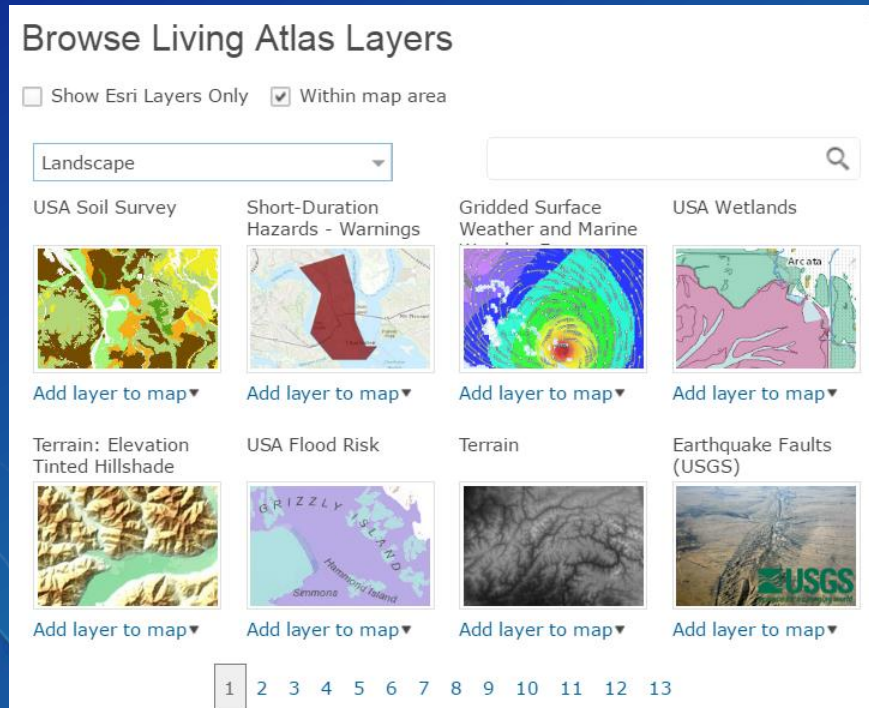
ArcGIS Maps for Adobe Creative Cloud



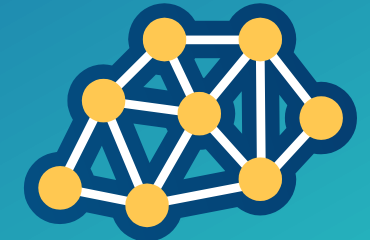
Content Strategy

Requirements| Understanding your Administrative Needs

What is your content strategy?



Basemaps



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?

Understanding your Administrative Needs

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

Create Initial Member Plan

Kelly and Stephanie

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

Wizard Co

SAVE

CANCEL

General

Home Page

Gallery

Map

Item Details

Groups

Utility Services

Roles

Marketplace

Credits


Security

Open Data

Roles ?

Create, edit, and manage roles in your organization. You may create a role based on an existing role or role template, allowing or denying role as you deem necessary.

Note that when creating or editing a role, changes aren't saved until you click Save Role.



CREATE ROLE

ASSIGN ROLES

Role Name	Minimum Level	Members	
Administrator	2	1	
GIS Analyst	2	1	
Intern	2	0	
Manager View	2	0	
Publisher	2	0	
User	2	0	
Viewer	1	0	
Water Content Manager	2	0	

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

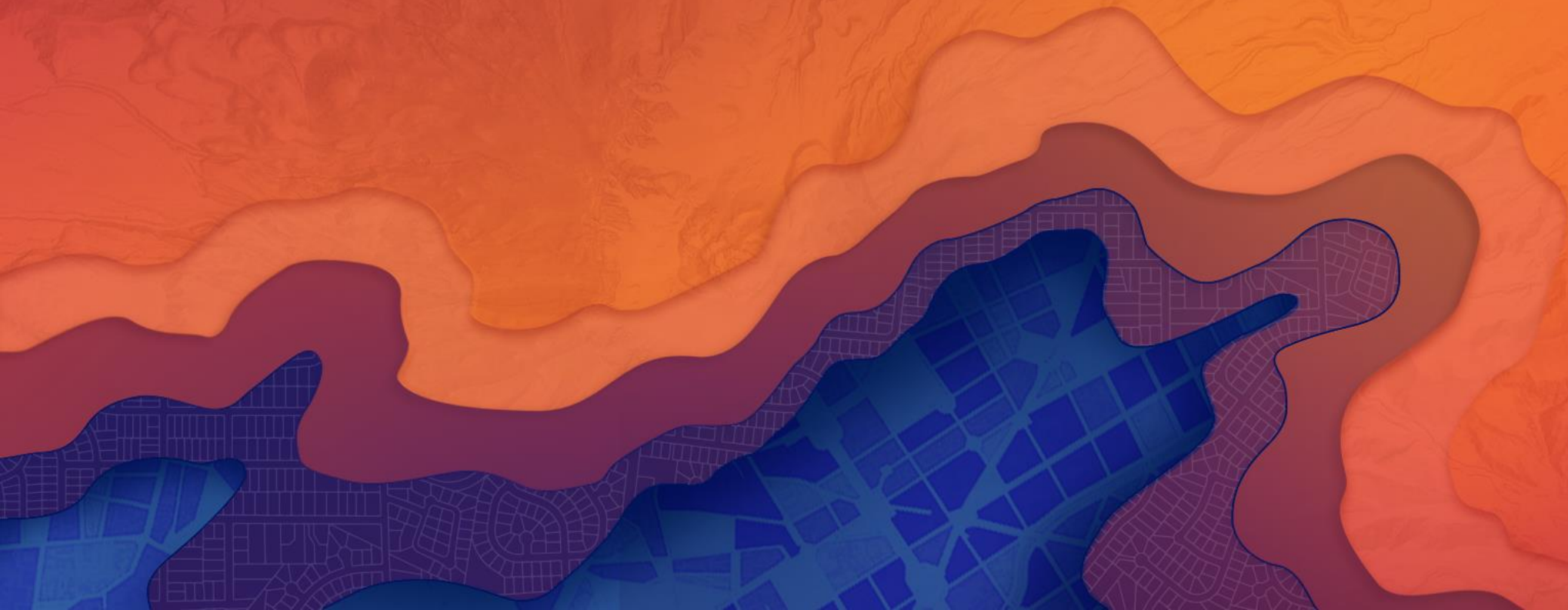
1. Invite Users
2. Assign Appropriate Role
3. Assign to Group
4. Allocate a Credit budget
5. Assign Licenses
6. My Esri Access



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?



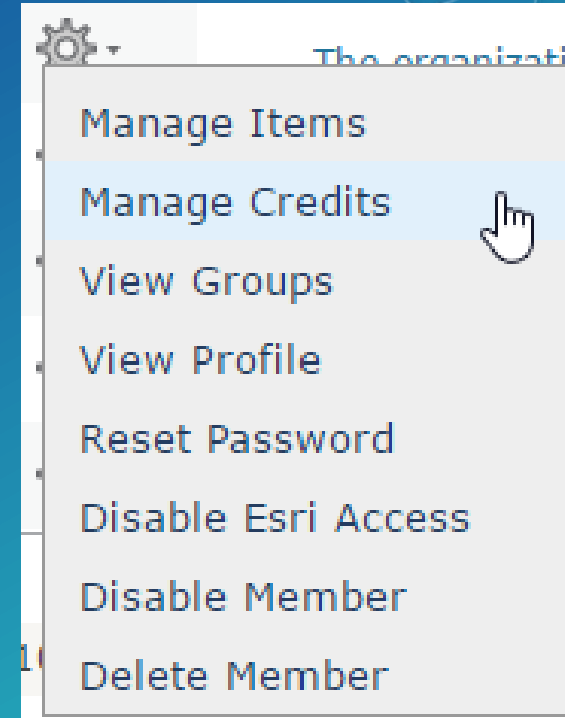
Demo – Monitoring Members

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



Bulk Management

Revisit and Update

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

Please Take Our Survey on the Esri Events App!

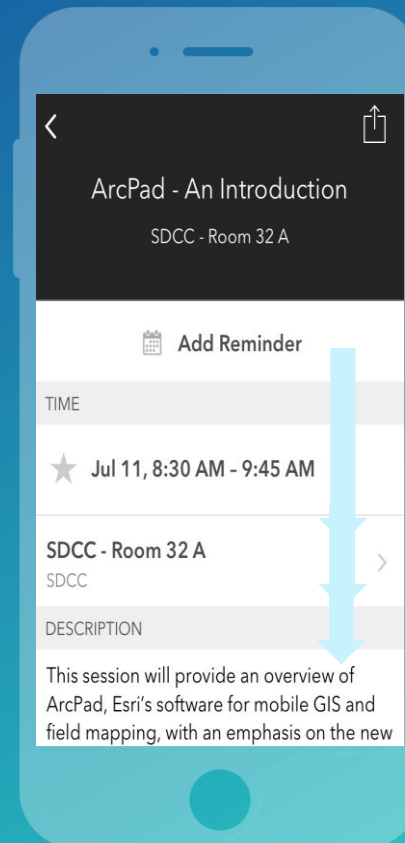
Download the Esri Events app and find your event



Select the session you attended



Scroll down to find the survey



Complete Answers and Select "Submit"





esri

THE
SCIENCE
OF
WHERE

Section Header

SUBHEAD INFORMATION



Header for Demo Slide

Supporting Text

Which Font is Best For Your Presentation?

Avenir Next

If you are the sole presenter and **will not distribute your PowerPoint presentation to others outside of Esri** and will only be using your own Esri computer for presenting, please use the new font Avenir Next LT Pro.

See instructions on the following slide to see how to use this new font.



Use Avenir Next if ...

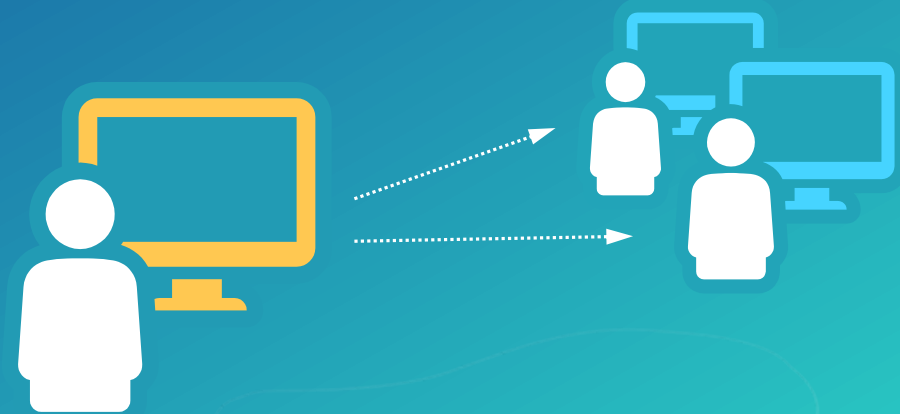
Sole Presenter

Single computer used for presentation

Arial

If you will be distributing your PowerPoint presentation to **others outside of Esri**, or using various computers to present please use Arial.

Using Arial gives your PowerPoint presentation the flexibility to be used by many people on various machines without the risk of font compatibility and changing the look of your layout.



Use Arial if...

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Presentation used on multiple computers

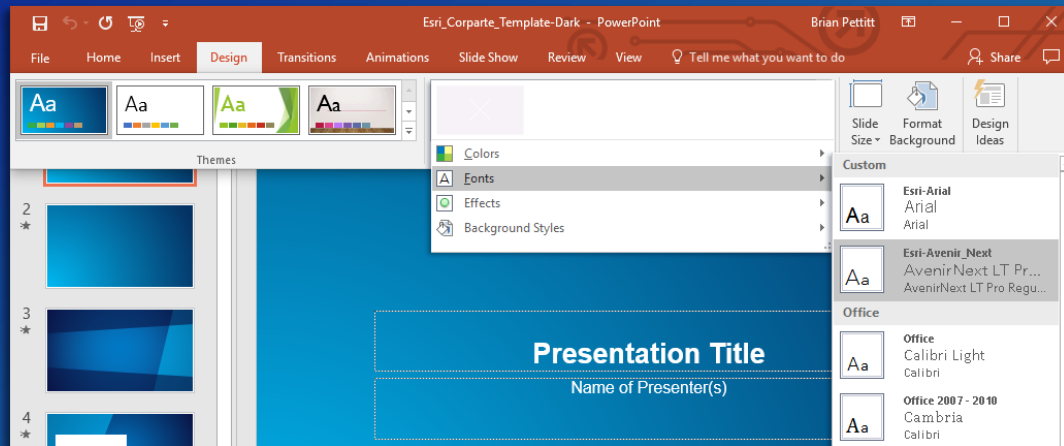
Headline Here

Text goes here

How to Change Your Theme Fonts to Avenir Next

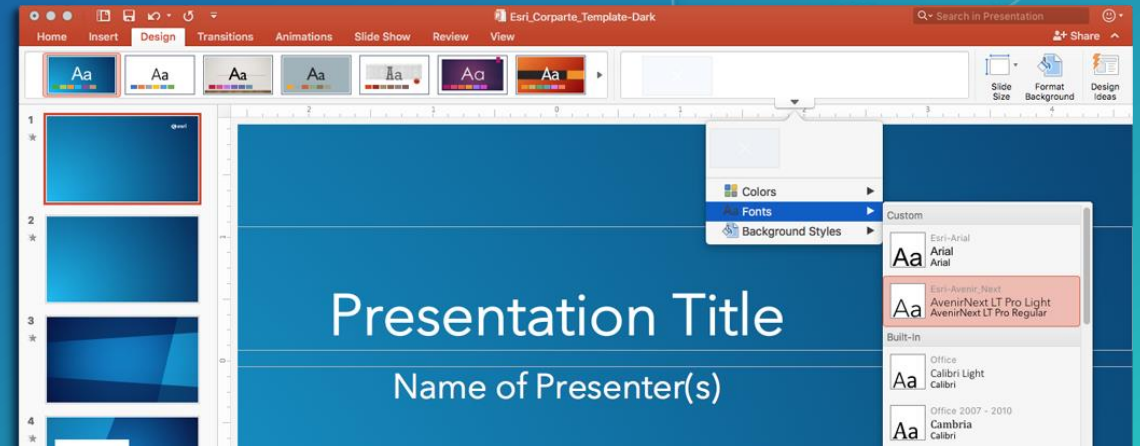
Windows

Select: Design
Variants (arrow)
Fonts > Esri-Avenir Next

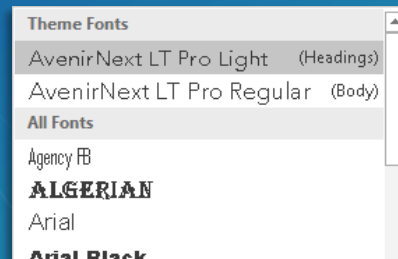


Mac

Select: Design
Variants (arrow)
Fonts > Esri-Avenir Next



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*If the text boxes on your slides are not using
(Heading) or (Body) fonts from the Theme Fonts
section, they will not update correctly.
You will have to replace them manually.*

How to Test if you're using Avenir Next

If you have Avenir Next installed, the two Qs will match.



Picture



Live Text

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Copy and paste your slides from your **current** deck into the **newest** template. The title and ending logo slide will update automatically.


For More Templates, Sample Files, and Icons See

<https://compass.esri.com/resources/presentations/Pages/Main.aspx>

Videos not working?

For video in PowerPoint, animated GIF is recommended. AVI and WMV (native PC files) will work best on a PC platform. H.264 MP4 will work only on PowerPoint 2013 and later.

Aspect Ratio Test



If this shape does not appear as
a perfect circle, adjust the aspect
ratio of your display until it does.

Try the resolution 1920x1080 for
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