

How To Configure & Use Insights for ArcGIS

ARAVIND SIVASAILAM
MATT THOMAS

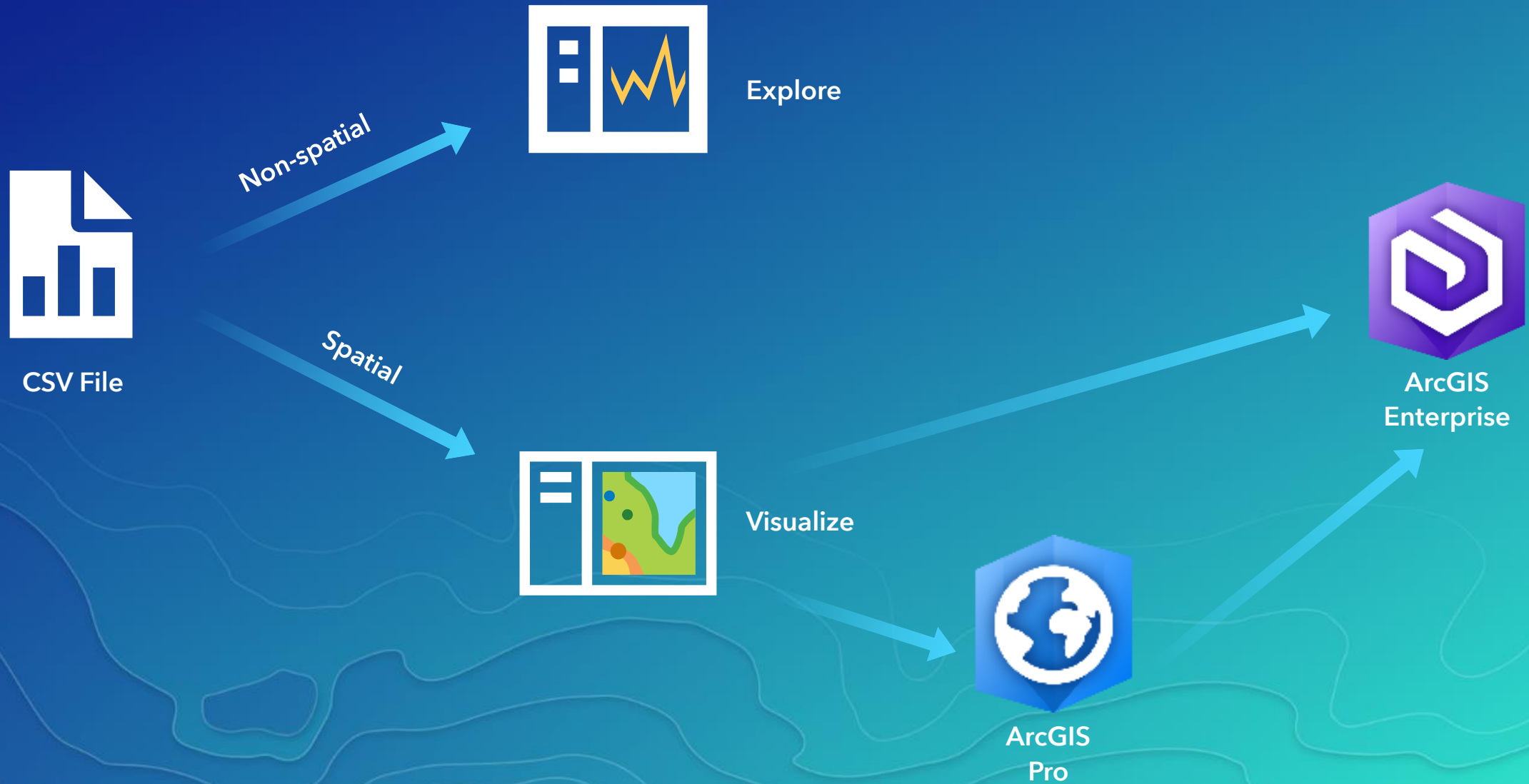
Who is this for?

- ArcGIS Enterprise Publishers & Administrators
- ArcGIS Enterprise Users
- (Little to No Experience with Insights)

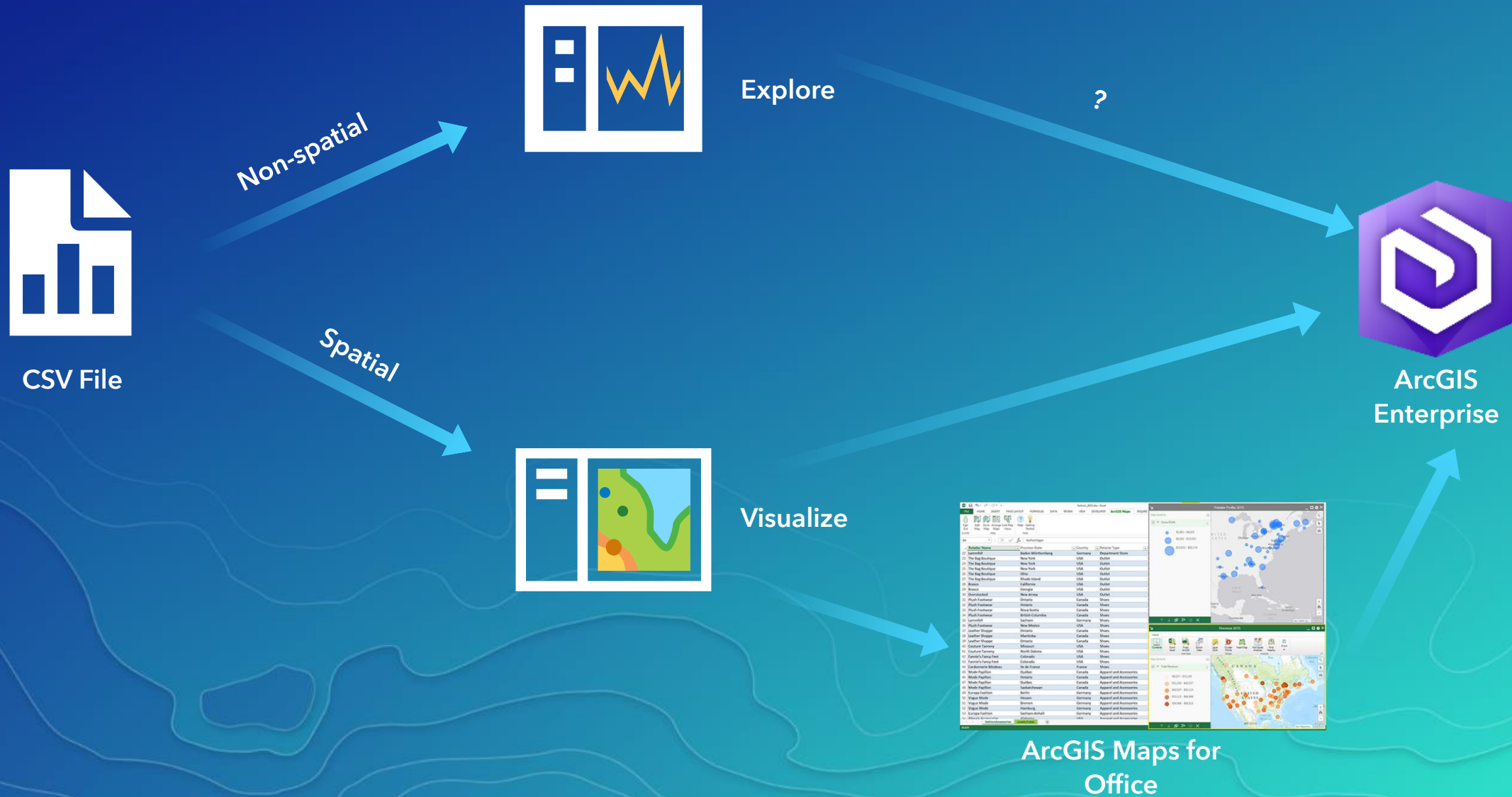


Insights for ArcGIS®

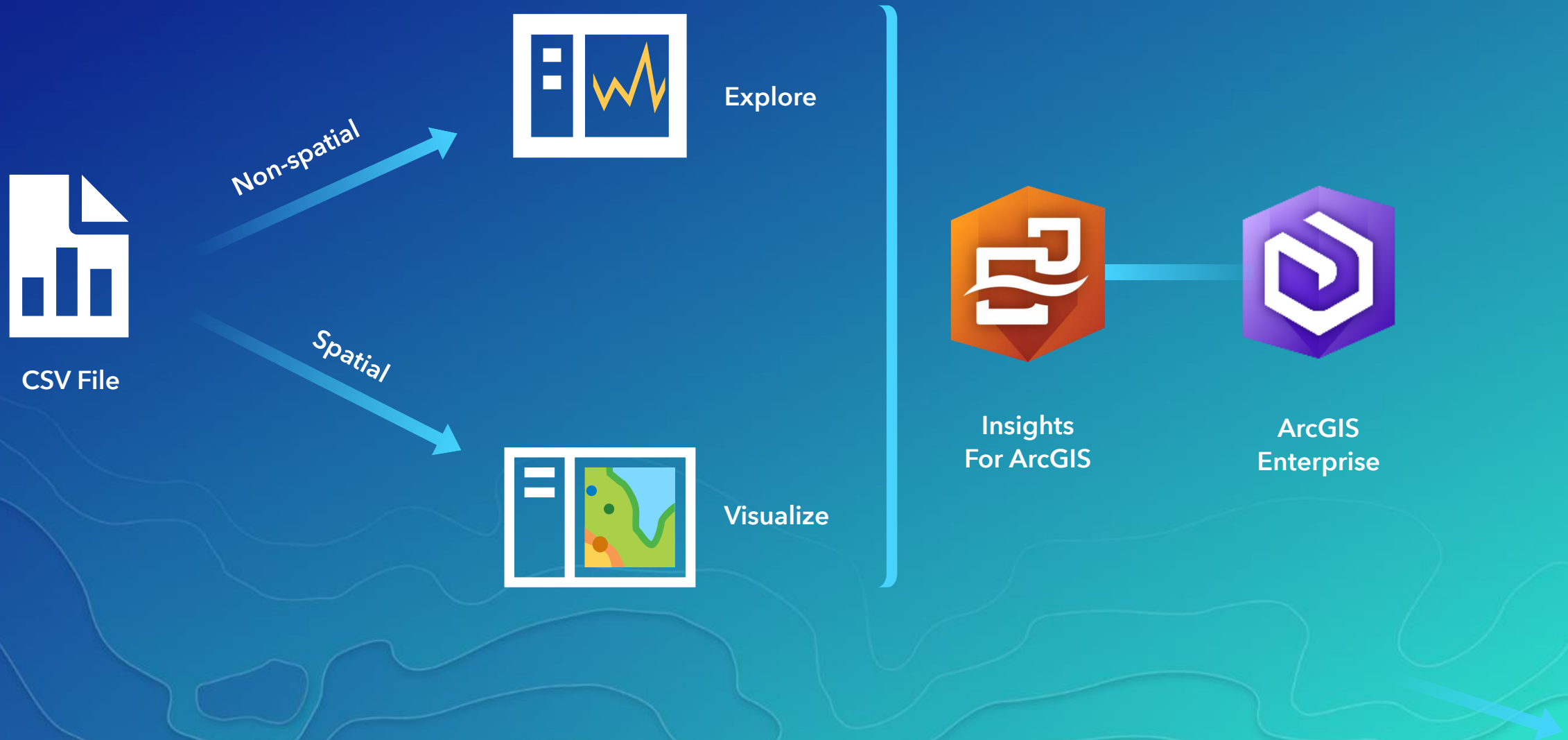
The Conundrum



The Conundrum



The Conundrum



Key Takeaways

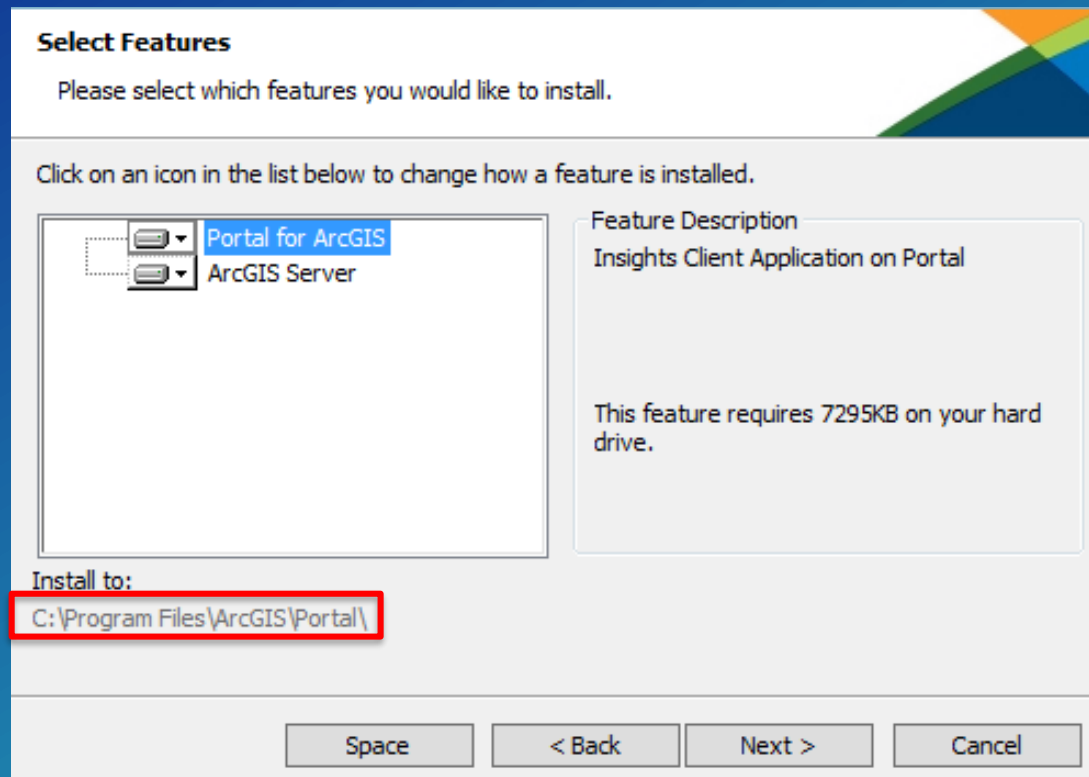
- Deploy
- Configure
- Use

Deploy Insights for ArcGIS

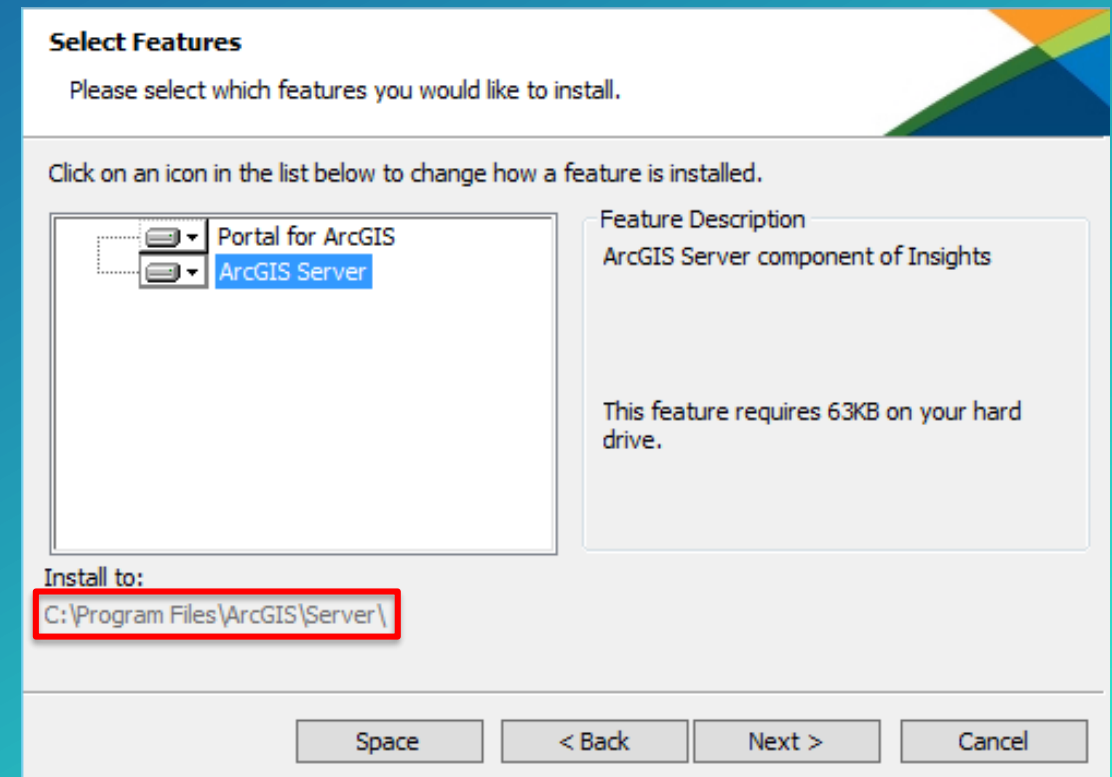
STEPS FOR SUCCESSFUL SETUP OF INSIGHTS

What went wrong?

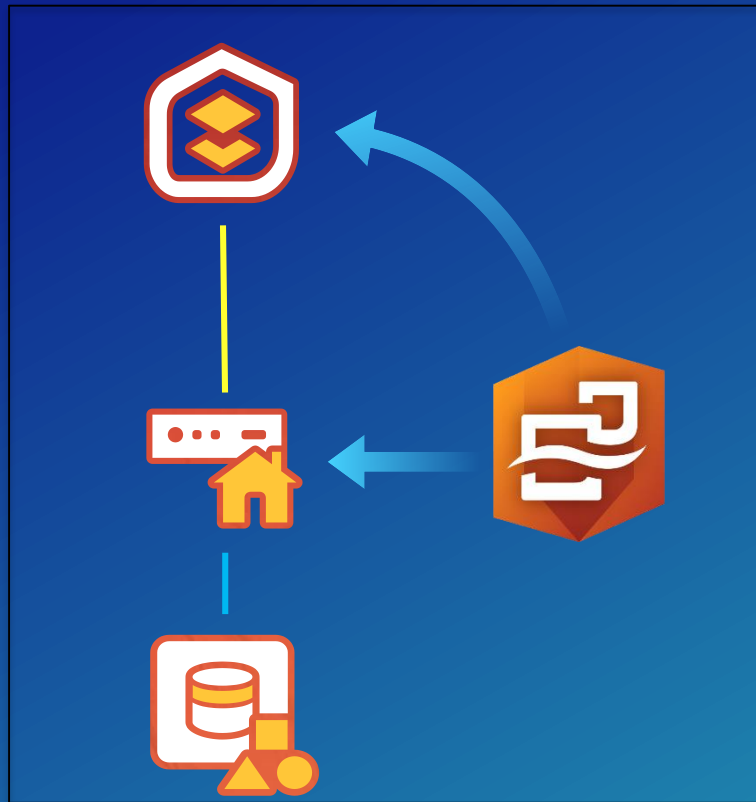
- A separate installer.
- Insights needs to be installed on Portal for ArcGIS



ArcGIS for Server



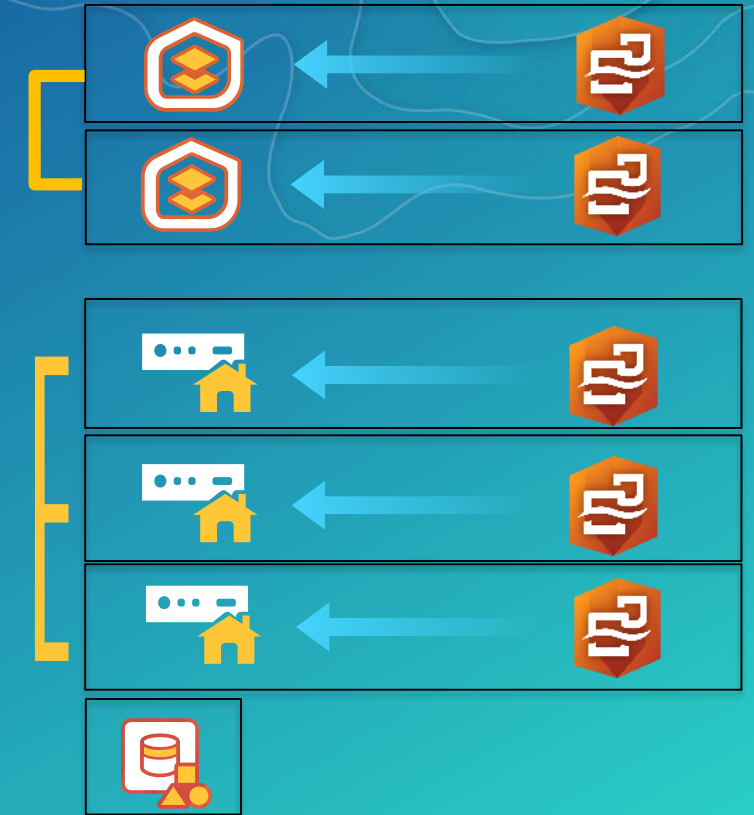
Deployment Scenarios - Install & Upgrade



Single machine deployment



Distributed deployment



High availability deployment



Portal for ArcGIS



ArcGIS Server



ArcGIS Data Store



Insights for ArcGIS

Deployment Scenarios – Install & Upgrade

Note: Insights for ArcGIS need only be installed on the Hosting Server

Portal for ArcGIS



GIS Server



Hosting Server



ArcGIS Data Store



Distributed
deployment

Deployment Scenarios – Install & Upgrade

Note: Insights for ArcGIS need not be installed on the ArcGIS Data Store machine



Distributed
deployment

License Insights for ArcGIS

Demonstration

MY ORGANIZATION

Product

Insights for ArcGIS

Navigator for ArcGIS

Licenses

50

50

Available

49

49

Members

[SELECT ALL](#)

Search by

Click to select a member.

License your Insights

Provide the right privileges

Create, analyze
& share



Level 2
Administrator



Level 2
Publisher

View
(Does not Need
Insights License)




Level 2
User




Level 1
Viewer

Accessing Insights for ArcGIS

[Home](#) [Gallery](#) [Map](#) [Scene](#) [Groups](#) [My Content](#) [My Organization](#)

 Matt

 Portal for ArcGIS

[EDIT SETTINGS](#) [ADD MEMBERS](#) [VIEW STATUS](#) [MANAGE LICENSES](#)

Members

Viewing: Current Members

Name	Username	Last Login	Level	Role	Action
Matt Thomas	portaladmin	Jul 10, 2017	2	Administrator	
user one	testuser	Jun 5, 2017	2	viewerPlus	

Membership

Members per level:

- 1 0 of 25
- 2 2 of 50

Total Members: 2 of 75

Find...

- The most viewed items
- The last items added
- Groups
- The organization's registered apps

Page 1 of 1 Viewing 1 - 2 of 2

Accessing Insights for ArcGIS

The screenshot shows the ArcGIS Portal for ArcGIS interface. The top navigation bar includes links for Home, Gallery, Map, Scene, Groups, My Content, and My Organization. A user profile for 'Matt' is visible in the top right corner. Below the navigation bar, the 'Portal for ArcGIS' logo is displayed on the left, and a dropdown menu for 'Apps' is open on the right. The 'Apps' menu lists three options: 'Business Analyst', 'GeoPlanner for ArcGIS', and 'Insights for ArcGIS', which is highlighted with a red rectangular box. Below the 'Apps' menu, there are four action buttons: 'EDIT SETTINGS', 'ADD MEMBERS', 'VIEW STATUS', and 'MANAGE LICENSES'. The main content area is titled 'Members' and features a table of current members. The table has columns for Name, Username, Last Login, Level, Role, and Action. Two members are listed: 'Matt Thomas' (portaladmin, Jul 10, 2017, Level 2, Administrator) and 'user one' (testuser, Jun 5, 2017, Level 2, viewerPlus). To the right of the members table, there is a 'Membership' section showing 'Members per level' (0 of 25 for Level 1, 2 of 50 for Level 2) and 'Total Members: 2 of 75'. Below this, there is a 'Find...' section with links to 'The most viewed items', 'The last items added', 'Groups', and 'The organization's registered apps'. At the bottom of the page, there is a pagination bar showing 'Page 1 of 1' and 'Viewing 1 - 2 of 2'.

Home Gallery Map Scene Groups My Content My Organization

Portal for ArcGIS

Apps

Business Analyst GeoPlanner for ArcGIS **Insights for ArcGIS**

EDIT SETTINGS ADD MEMBERS VIEW STATUS MANAGE LICENSES

Members

Viewing: Current Members Search for Name...

Name	Username	Last Login	Level	Role	Action
Matt Thomas	portaladmin	Jul 10, 2017	2	Administrator	
user one	testuser	Jun 5, 2017	2	viewerPlus	

Membership

Members per level: 1 0 of 25 2 2 of 50

Total Members: 2 of 75

Find...

The most viewed items

The last items added

Groups

The organization's registered apps

Page 1 of 1 Viewing 1 - 2 of 2

Accessing Insights for ArcGIS


Request for Permission testuser ▼


Insights for ArcGIS wants to
access your ArcGIS Enterprise
account information

APPROVE


NO THANKS

Accessing Insights for ArcGIS

[Home](#) [Help](#)  [Esri](#)




Insights






Workbooks

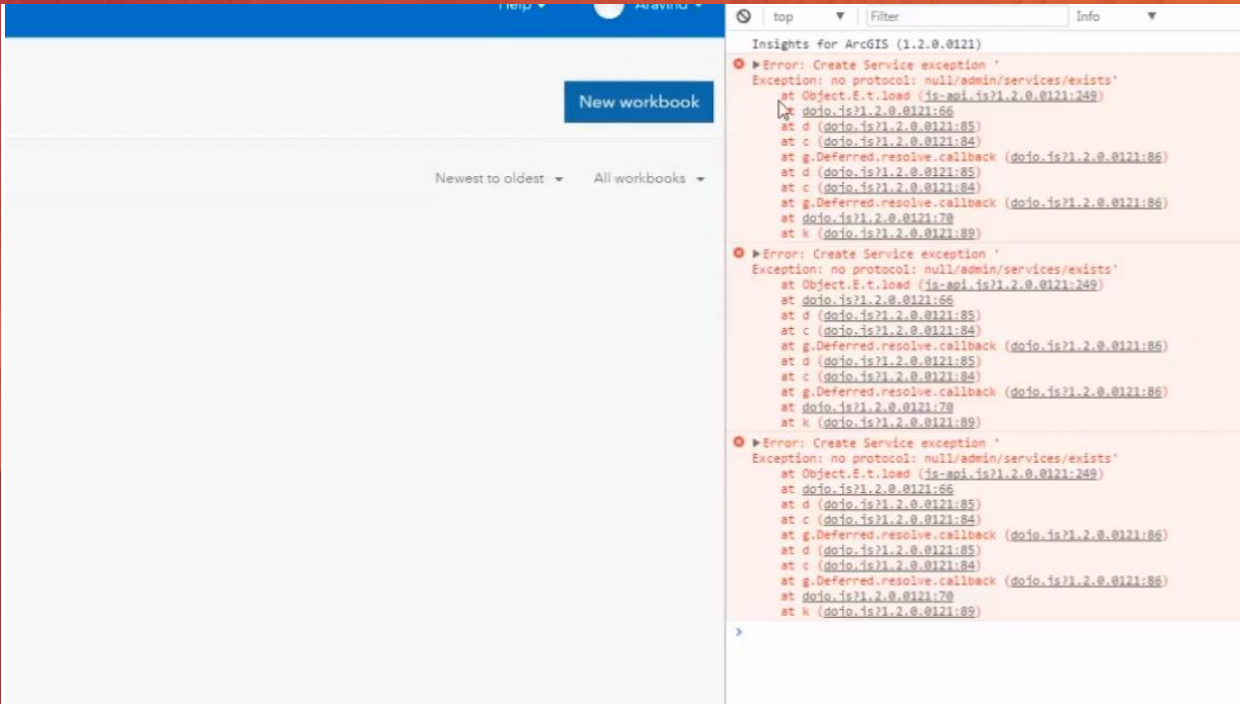
[New workbook](#)

[Newest to oldest](#) [All workbooks](#)



Pop2010
testuser

7/3/2017   

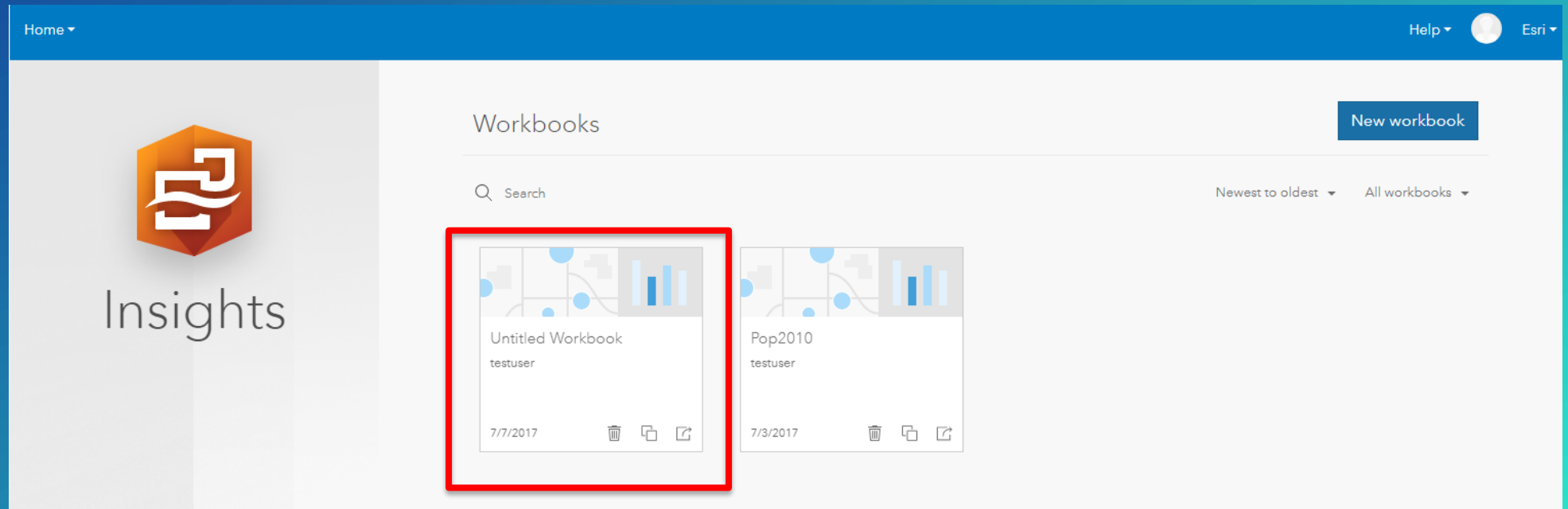
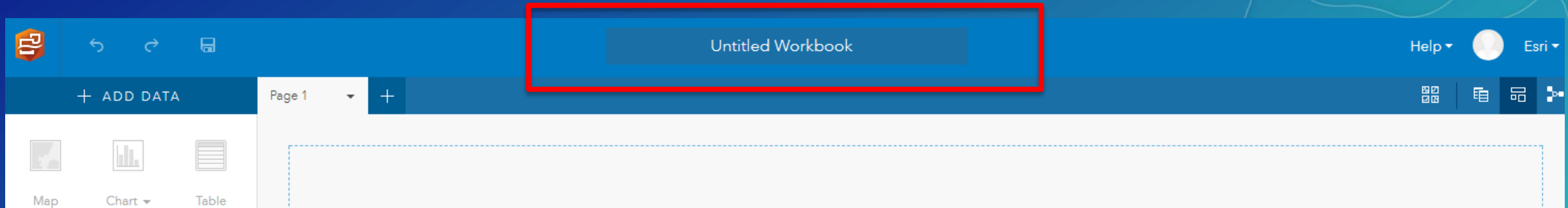


Creating our First Workbook

Demonstration

Troubleshooting

- Consider: What happens when a Workbook is created



Troubleshooting

- Consider: What happens when a Workbook is created

My Content

Folders

 NEW  DELETE

 Add Item  Create  Share  Delete  Move

 Title	Type	Modified	Shared
 Untitled Workbook	 Insights Workbook (hosted)	May 29, 2017	Not Shared

URL

 View

<http://westeros.esri.com/server/rest/se>



Troubleshooting

- Consider: What happens when a Workbook is created

ArcGIS REST Services Directory

[Home](#) > [services](#) > [Hosted](#)

[JSON](#) | [SOAP](#)

Folder: Hosted

Current Version: 10.51

View Footprints In: [ArcGIS Online map viewer](#)

Services:

- [Hosted/3fed8b3b](#) (WorkspaceServer)
- [Hosted/526e312d](#) (WorkspaceServer)
- [Hosted/a0e27376](#) (WorkspaceServer)
- [Hosted/aa93fd3d](#) (WorkspaceServer)
- [Hosted/Matt_Test](#) (FeatureServer)
- [Hosted/Population_2010_CA_County](#) (FeatureServer)
- [Hosted/Supervisoryal_Districts_rKrNuE](#) (FeatureServer)
- [Hosted/XY](#) (FeatureServer)

Supported Interfaces: [REST](#) [SOAP](#) [Sitemap](#) [Geo Sitemap](#)

Troubleshooting

- Valid federated ArcGIS for Server

Add one or more servers to your portal.

VALIDATE SERVERS **ADD SERVER**

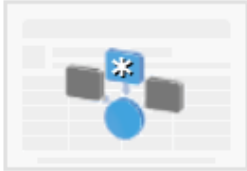
Servers

✓ <https://westeros.esri.com:6443/arcgis>

- A designated hosting server


Hosting Server

Optionally choose one of your servers to act as your portal's hosting server. Your portal members will be able to publish services to this server. ArcGIS Server's Managed Database must be configured on the site before it can be designated as the portal's hosting server.

 No hosting server ▼

Hosting Server

Optionally choose one of your servers to act as your portal's hosting server. Your portal members will be able to publish services to this server. ArcGIS Server's Managed Database must be configured on the site before it can be designated as the portal's hosting server.

 westeros.esri.com/winterfe ▼

Troubleshooting

- Try to create a feature layer using a template in Portal's My Content page.

My Content

The screenshot shows the 'My Content' page in ArcGIS Portal. The 'Create' dropdown menu is open, and the 'Feature Layer' and 'Tile Layer' options are highlighted with a red box. The background shows a list of content items with columns for Type, Modified, and Shared.

Type	Modified	Shared
Map Image Layer	Jun 15, 2017	Not Shared
Geoprocessing Service	Apr 14, 2017	Everyone
Geometry Service	Apr 14, 2017	Everyone

- If Feature & Tile Layer options are missing &
 - If you are unable to publish hosted feature layers
- this is a Base ArcGIS Enterprise deployment issue.

Troubleshooting

- Compatibility with Portal for ArcGIS:

Insights Version	ArcGIS Enterprise 10.5	ArcGIS Enterprise 10.5.1
1.0 - 1.2.1	Yes	No
2.0	No	Yes

Troubleshooting

- Certificates:
 - Use a domain certificate or a CA certificate when possible.
 - Import the certificates into Portal & Server administrator directories and into browsers for trust.
- Call Esri Technical Support

Configure Insights for ArcGIS

STEPS FOR CONFIGURATION OF INSIGHTS

Adding Data into Insights

Add To Page

Data

Model

Content

Groups

Organization

Living Atlas

Boundaries

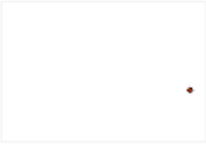
Excel or CSV


Database


Search

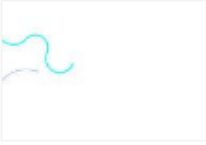
5 Results


Sort by: Most relevant

XY
By testuser

CaliforniaStatsShapefile
By testuser

Supervisorial_Districts
By testuser

Matt_Test
By testuser

Population 2010 CA County
By testuser

View details

View details

View details

View details

View details

Selected Data

0

Add

Close

Adding Portal content



Adding Data into Insights

Add To Page

Data

Model

Content

Groups

Organization

Living Atlas

Boundaries


Excel or CSV

Database

Search


62 Results

Sort by: Most relevant




USA Native Lands
By esri_livingatlas

View details




USA Critical Habitat
By esri_livingatlas

View details




USA Airports
By esri_livingatlas

View details



USA Parks
By esri_livingatlas

View details



World Cities
By esri_livingatlas

View details

Selected Data

0

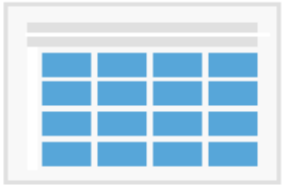
Add

Close

Living Atlas & Boundaries

Living Atlas

Configure Living Atlas Content ?




☒ Access Living Atlas content in your portal.

Check the box for the additional types of Living Atlas content you would like to enable in your portal and provide ArcGIS Online credentials for accessing them.

To disable an existing type of content, uncheck the account checkbox and click Configure.

☒ Subscriber

☐ Premium (requires credits )

Boundaries



GIS data



Portal for ArcGIS

Boundary layers for over 100 additional countries are now available on My Esri.

Adding Data into Insights

Add To Page

Data

Model

Content

Groups


Organization

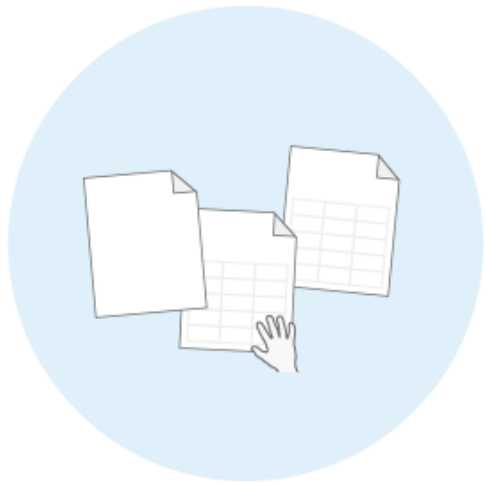
Living Atlas

Boundaries

Excel or CSV

Database





Drag and drop an Excel or CSV file

– or –

Browse my computer

Selected Data

0

Add

Close

Adding Data into Insights

The screenshot shows a 'Add To Page' dialog box with a sidebar on the left and a main content area. The sidebar has two tabs: 'Data' (selected) and 'Model'. Under the 'Data' tab, there are four options: 'My Content', 'My Organization', 'Excel', and 'Database'. The 'Database' option is highlighted with a red rectangle. The main content area is titled 'Select a Connection' and has a search bar. Below the search bar, it says '0 Connections' and 'A to Z'. A red rectangle highlights a 'New Connection' button with a database icon. Below this, a message states: 'No connections found. Establish a new connection by selecting "New Connection".' On the right side of the dialog, there is a 'Selected Data' section with a blue circle containing the number '0'. At the bottom right, there are two buttons: 'Add' and 'Close'.

Add To Page

Select a Connection

Search

0 Connections

A to Z

New Connection

No connections found. Establish a new connection by selecting "New Connection".

Selected Data 0

Add Close

Adding Data into Insights

Add To Page

Data

Model

My Content

My Organization

Excel

Database

[← Create New Connection](#)

New connections are not configured. Please contact your administrator.

Selected Data

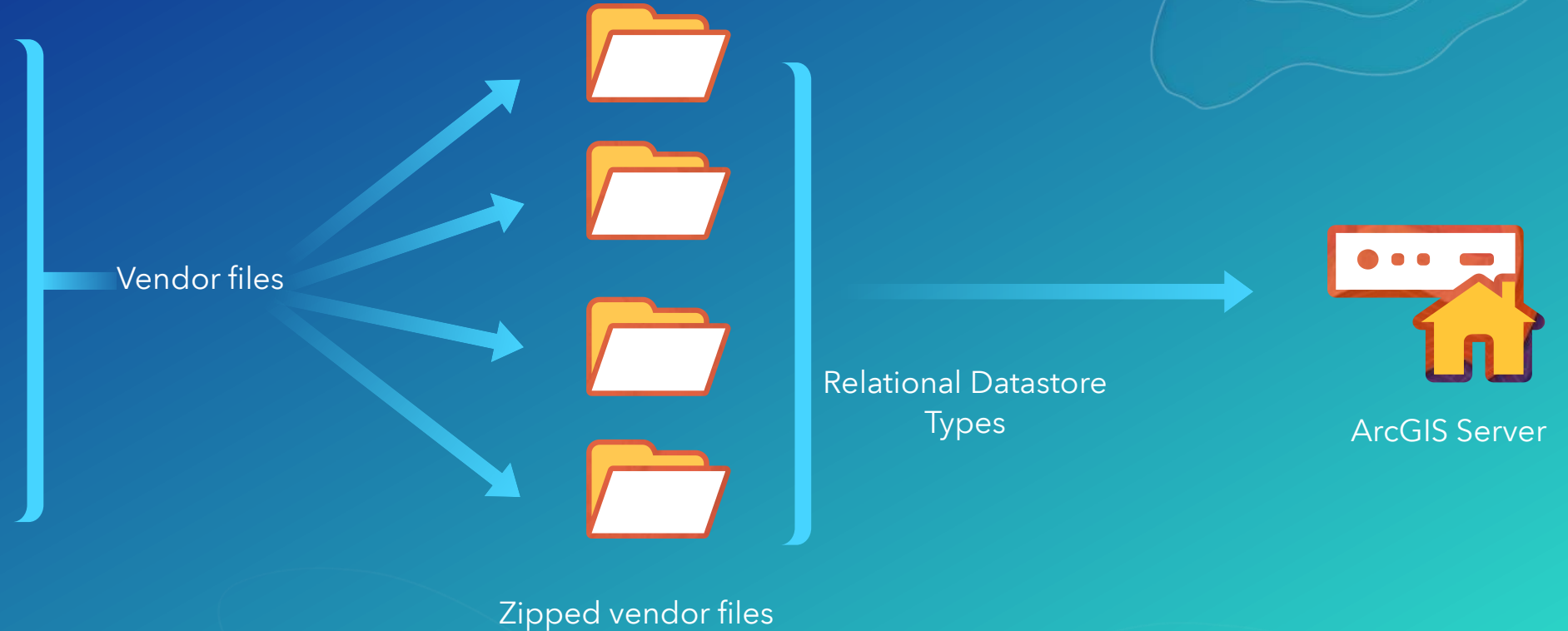
0

Add

Close

Adding data from database connections

- SQL Server
- Oracle
- SAP HANA
- Teradata



Add To Page

Data

Model

Content

Groups

Organization

Living Atlas

Boundaries

Excel or CSV

Database

← Create New Connection

Enter the information below, and click OK to create your connection.

Name *

Type *

Microsoft SQL Server ▼

User Name *

Password *

Server Name *

Database Name *

Register Relational Data Store Types

Demonstration

Configure Portal to use Insights

ArcGIS Online

Configure your portal to use utility services and content from ArcGIS Online.

Configure Utility Services



To configure your portal to use utility services from ArcGIS Online:

1. Check the box corresponding to the ArcGIS Online utility services you wish to configure with your portal.
2. Enter the credentials for an ArcGIS Online organizational account that your portal will use to access those services.
3. Click Configure.

Note: Clicking configure will update your portal utility service settings and save the configuration changes. Items corresponding to the selected ArcGIS Online utility services will be created in your My Content page and shared with all users in your organization. Using these services in the portal will consume credits from the specified ArcGIS Online account.

To remove an existing utility service and its corresponding items, uncheck the utility service checkbox and click Configure.

- | | |
|--|---|
| <input type="checkbox"/> Elevation | <input checked="" type="checkbox"/> Geocode |
| <input type="checkbox"/> GeoEnrichment | <input type="checkbox"/> Hydrology |
| <input type="checkbox"/> Network | |

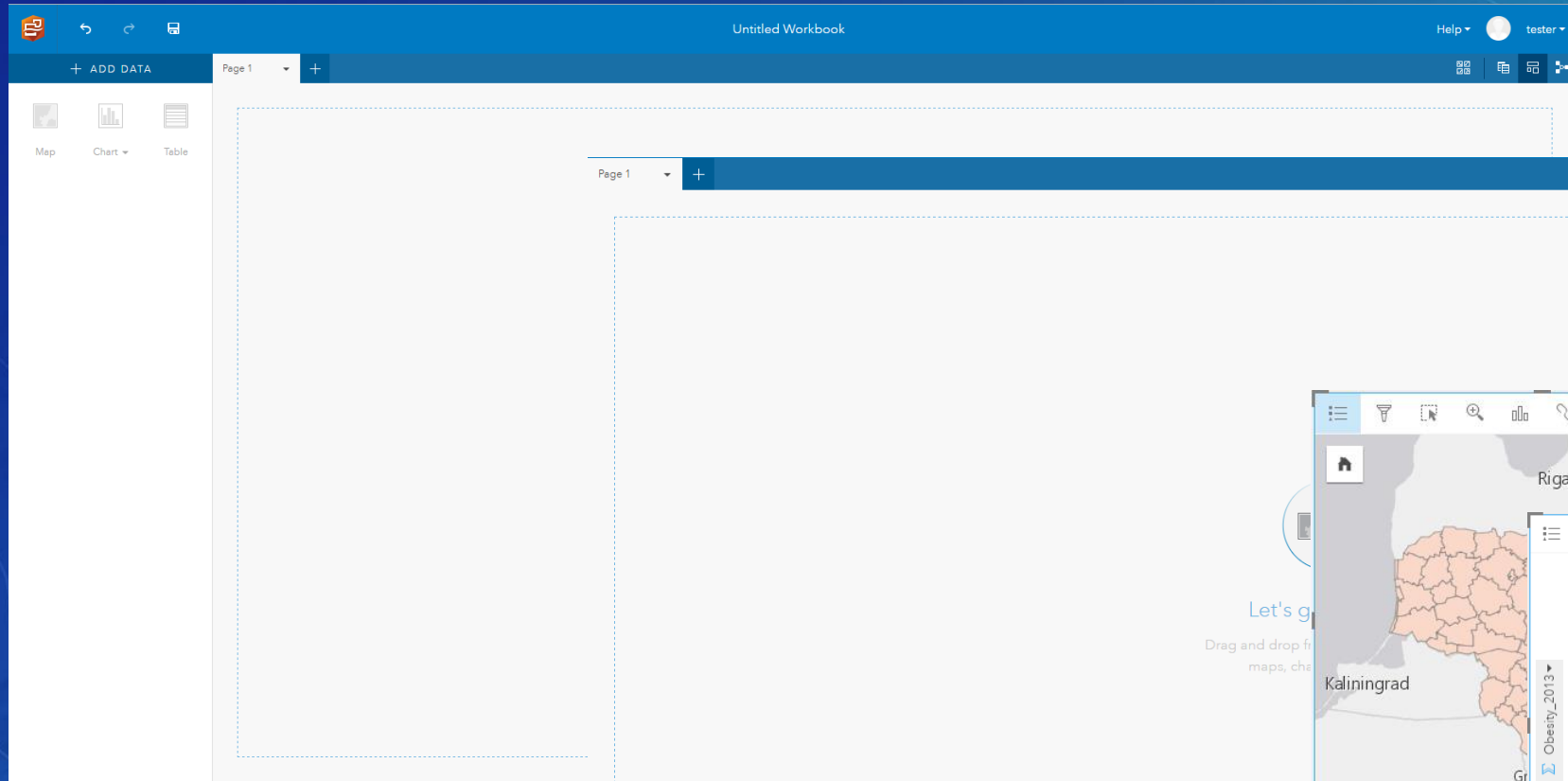
Configure analysis tools and utilities (ArcGIS Online or On-Premise),
for use in Insights for ArcGIS



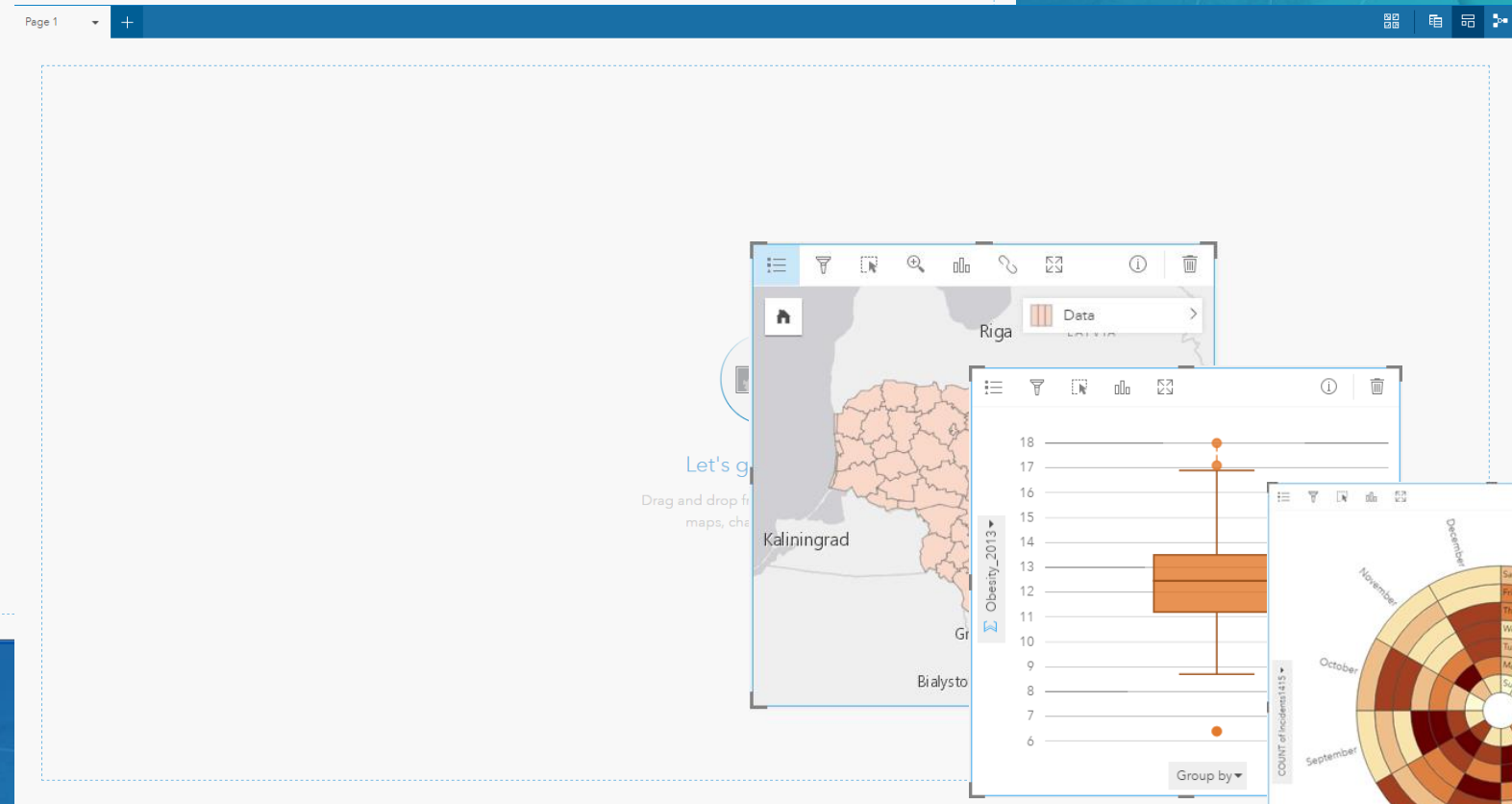
Use Insights for ArcGIS

MAKING FULL USE OF INSIGHTS

Structure of an Insights workbook

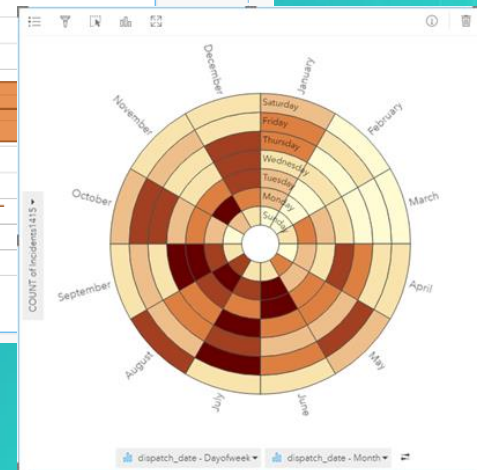


Workbooks



Pages

Cards



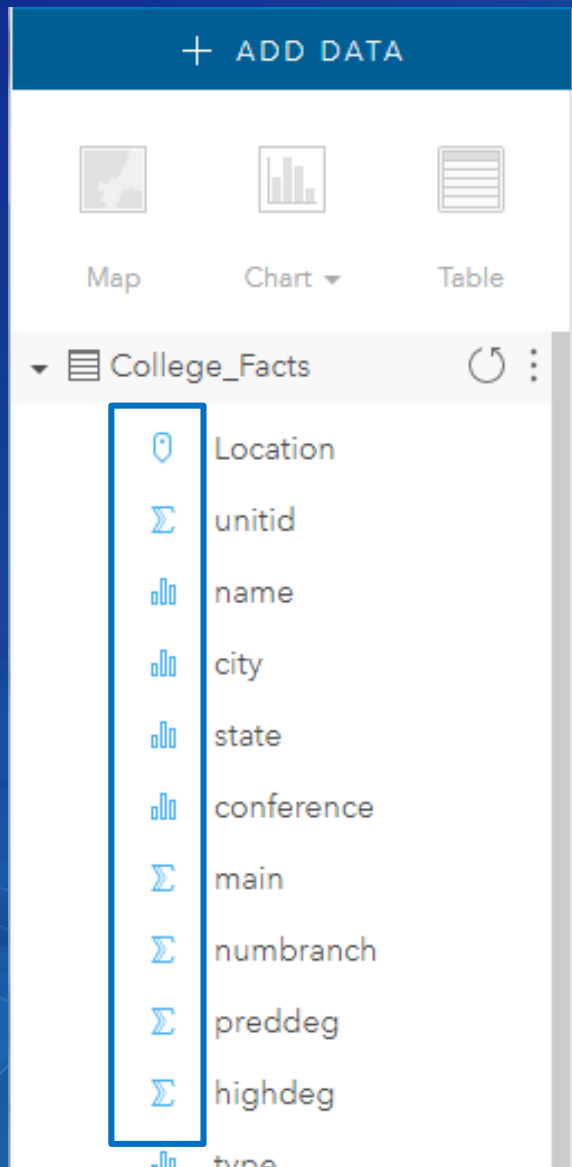
Overview of Workbook

The image shows a screenshot of the Microsoft Power BI interface with several components labeled:

- Insights Home**: Points to the Power BI logo in the top left corner.
- Page Title**: Points to the "Page 1" tab in the top navigation bar.
- Workbook Title**: Points to the "Untitled Workbook" text in the top navigation bar.
- Tools**: Points to the "Tools" section in the top right corner of the interface.
- Map Card**: Points to the "Card 1" map visualization in the main content area.
- Data Pane**: Points to the "College_Facts" data pane on the left side of the interface.
- Origin Layer**: Points to the "Location" field in the "College_Facts" data pane.

The interface includes a top navigation bar with the Power BI logo, navigation icons (back, forward, save), the page title "Page 1", the workbook title "Untitled Workbook", and user information "Help" and "tester". Below the navigation bar is a ribbon with "ADD DATA" and "Tools" sections. The "Tools" section includes a "Map" icon and a "Table" icon. The "Map" icon is selected, and the "College_Facts" data pane is visible on the left. The "College_Facts" data pane lists fields: Location, unitid, name, city, state, conference, main, numbranch, preddeg, and highdeg. The "Map Card" is a map visualization showing the United States with data points. The "Data Pane" is the "College_Facts" data pane. The "Origin Layer" is the "Location" field in the "College_Facts" data pane.

Field Roles



- Location



- String



- Number



- Rate/Ratio



- Date/Time



Type of Cards: Map, Chart, Table

The screenshot displays a user interface for creating data cards. On the left, a sidebar lists data fields under the heading "USA Historic Sites". The "Area Name" field is selected, indicated by a checkmark and a filter icon. Above the sidebar, a red box highlights three card type icons: a map icon labeled "Map", a bar chart icon labeled "Chart", and a table icon labeled "Table". The main workspace on the right, also outlined with a red box, shows three buttons: "Create Map", "Create Chart", and "Show Table". Below these buttons, a filter bar displays a checkmark, a bar chart icon, the text "Area Name", and edit and filter icons.

+ ADD DATA

Page 1

Map Chart Table

Card 2

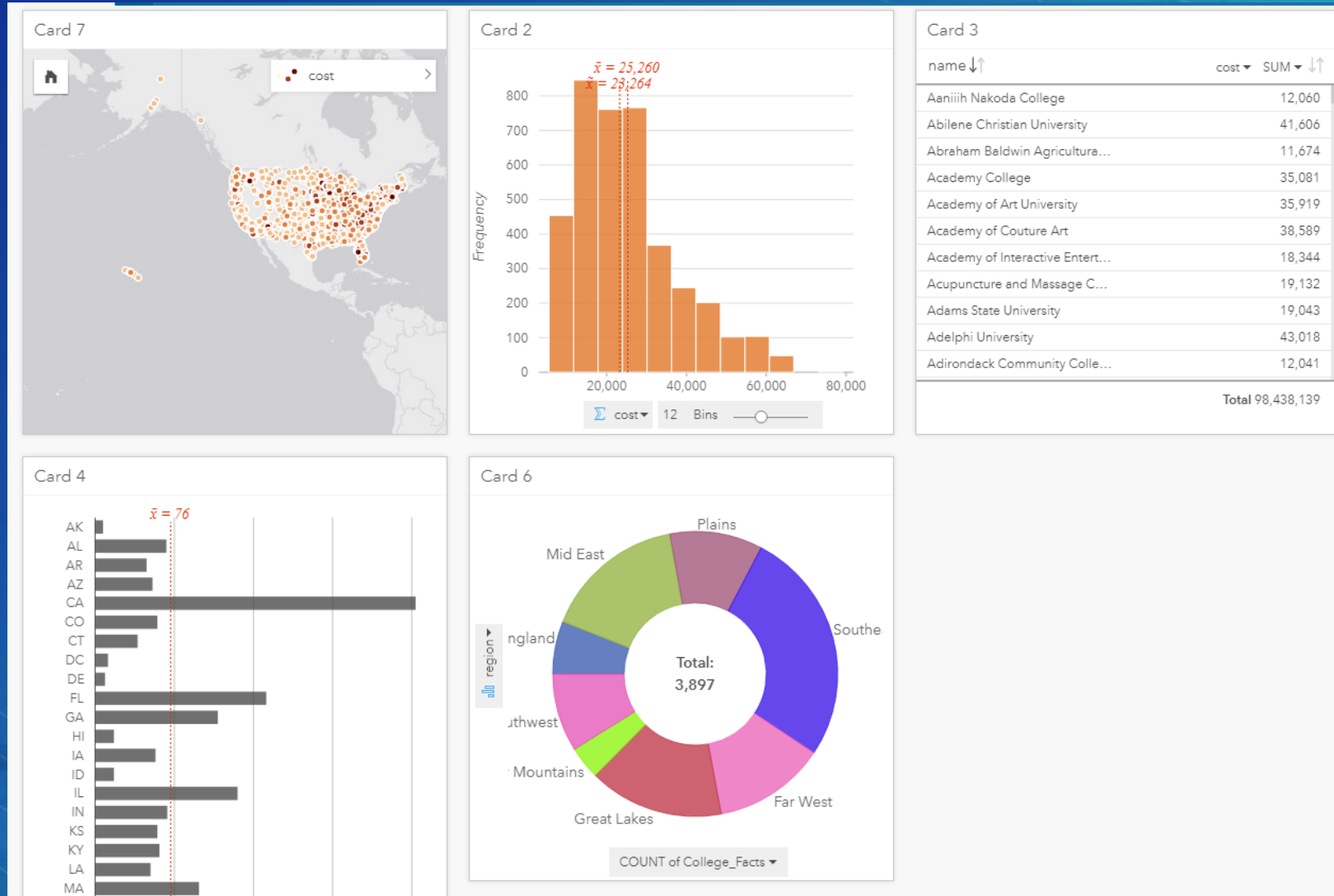
USA Historic Sites

- Location
- Owner
- Manager Name
- Local Manager Name
- Management Descript...
- ☒ Area Name
- Access Permitted
- GAP Status Code
- IUCN Management Ca...
- Year Designated

Create Map Create Chart Show Table

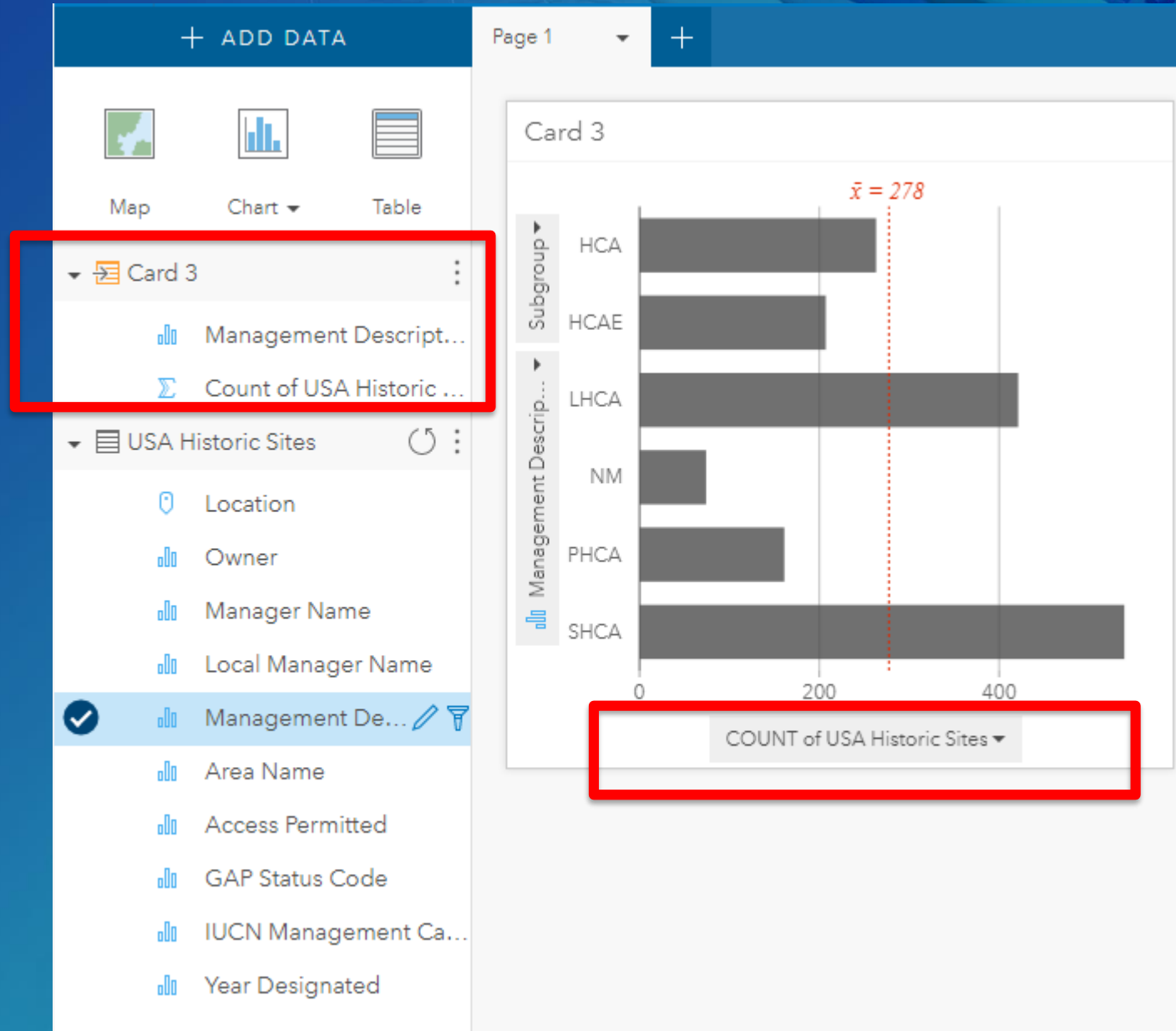
Area Name

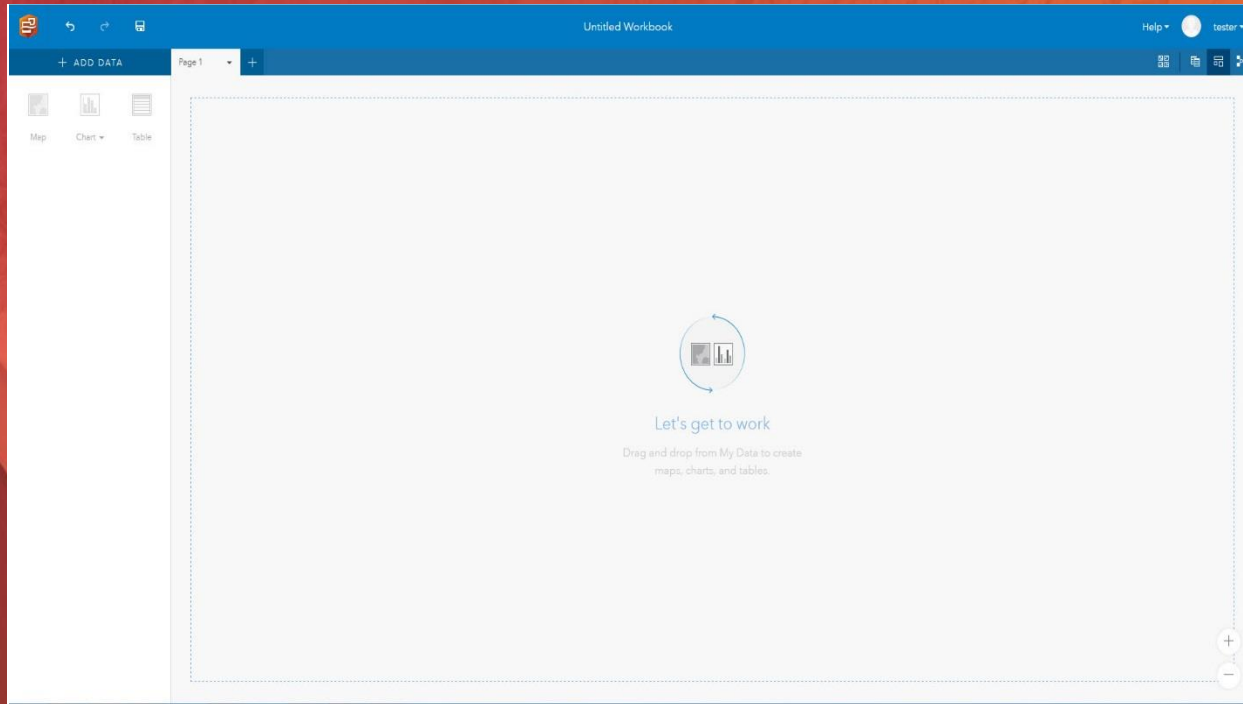
Type of Cards: Map, Chart, Table



Result Layers

When any kind of analysis or calculation is conducted in Insights, Result Layers are created



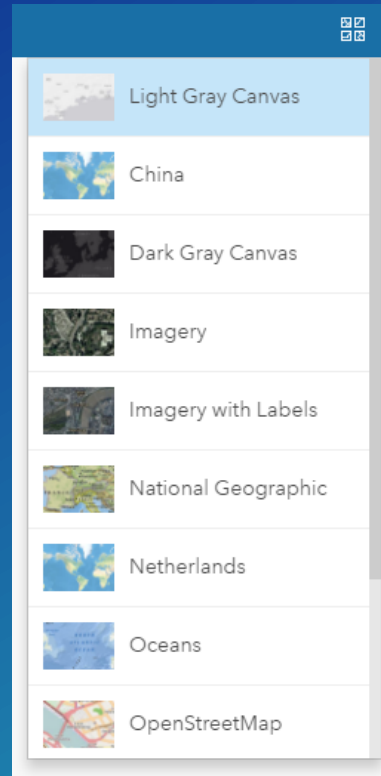


Using Insights for ArcGIS

Demonstration

What's New at v2.0?

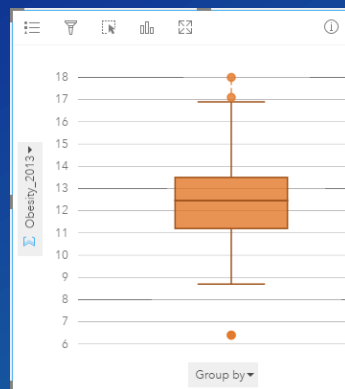
- Basemap toggle



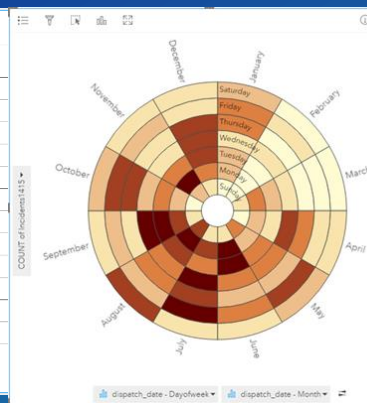
- Databases:
 - Oracle support.

What's New at v2.0?

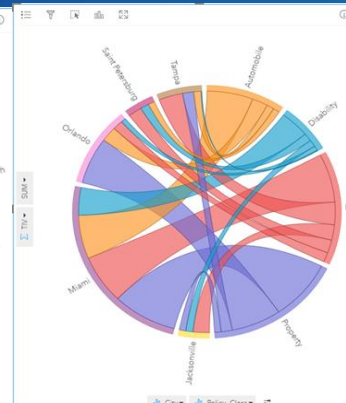
- Charts



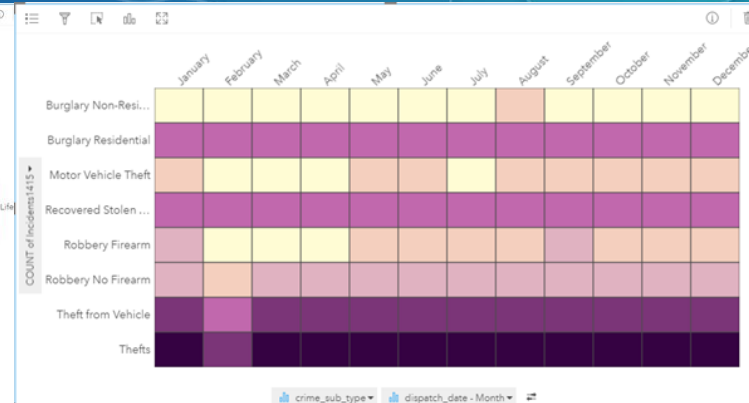
Box Plot



Data clock



Chord diagram



Heat Chart

- Data Sources

- CSVs
- Spatiotemporal data store

Key Takeaways

- Deploy
- Configure
- Use

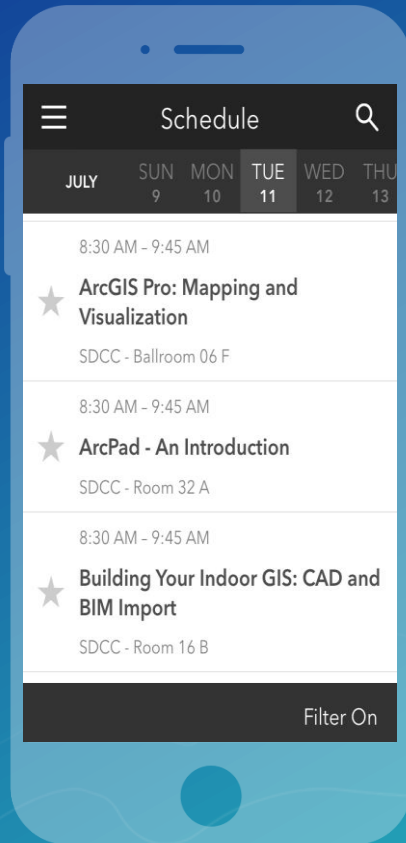
QUESTIONS?

Please Take Our Survey on the Esri Events App!

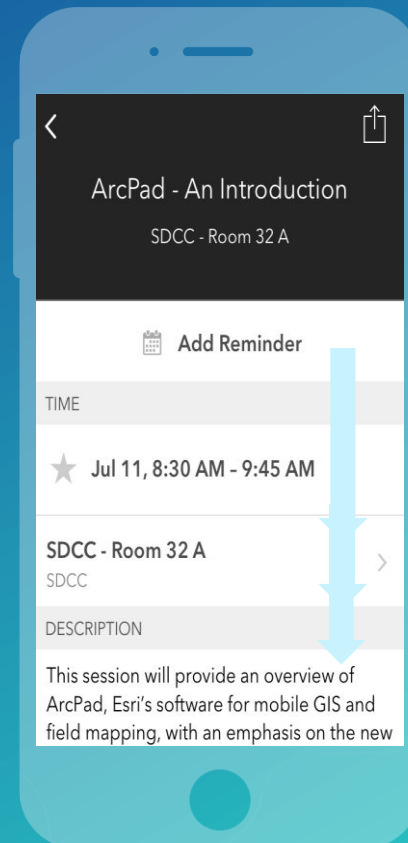
Download the Esri Events app and find your event



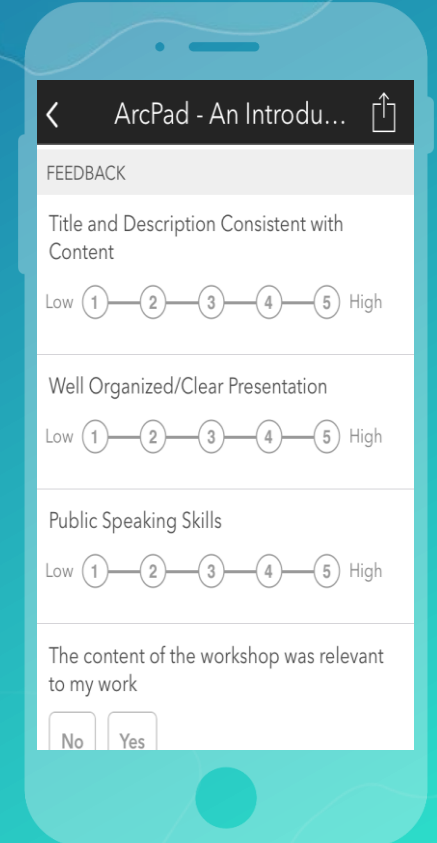
Select the session you attended



Scroll down to find the survey



Complete Answers and Select "Submit"





esri

THE
SCIENCE
OF
WHERE