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ArcGIS Online Implementation Guide

Essential tasks and best practices for setting up
ArcGIS Online.

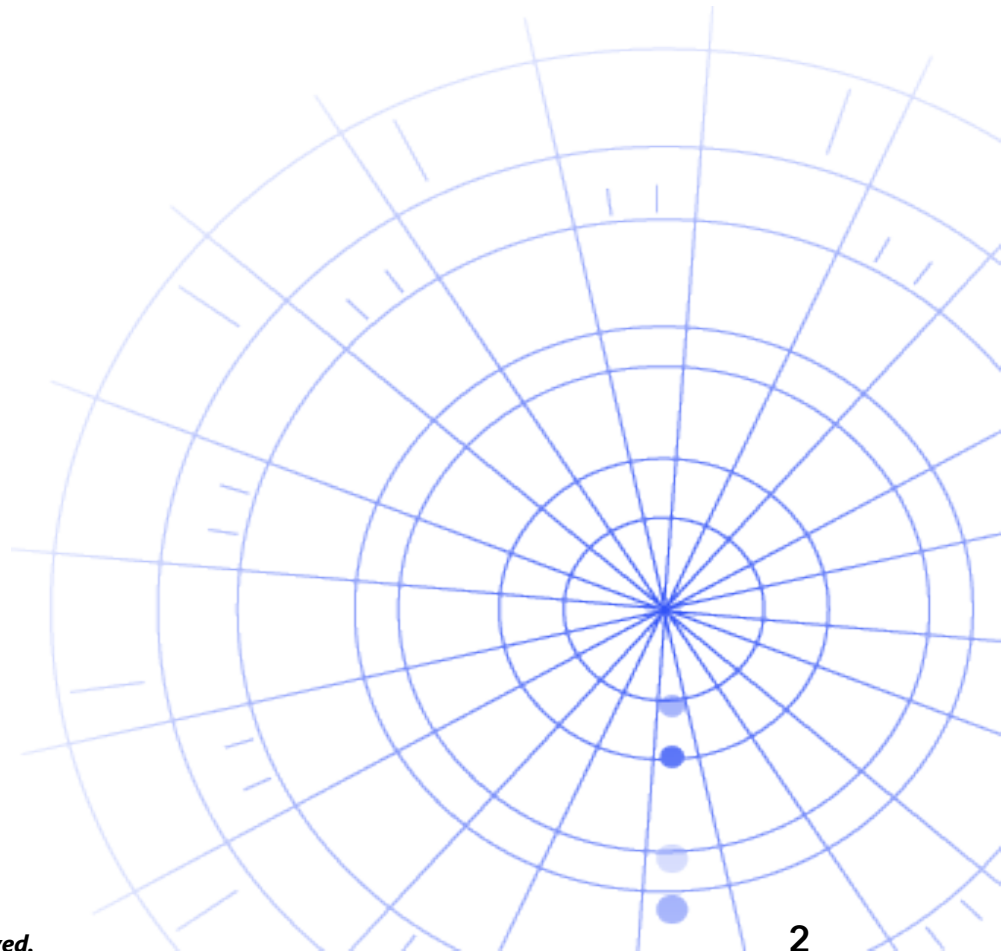


Task checklist

TASK

1. [Explore ArcGIS Online](#)
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COMPLETE



1. Explore ArcGIS Online

We're glad you've decided to start using ArcGIS Online for your organization. If you have little or no GIS experience, that's OK—now is a great time to get started with Esri's cloud-based mapping and analytics software. ArcGIS Online allows you to connect people, locations, and data. Create interactive maps to visualize and explore your data. Powerful analysis tools help you discover and refine your data's story. Share engaging maps that tell that data's story and influence change.

Before setting up ArcGIS Online, run through a few quick hands-on tutorials that will help you understand the fundamentals of mapping and analysis.

The tutorials show you how to do the following:

- **Explore a map.** See who left, where they went, and who stayed after Hurricane Harvey. [10 minutes]
- **Get started with ArcGIS Online.** Create and share an evacuation map to prepare for an incoming hurricane. [45 minutes]
- **Share a map.** Share your map of recreational facilities. [20 minutes]
- **Make a walk-time map.** Use spatial analysis to find out where you can walk in 20 minutes. [15 minutes]
- **Create a scene.** Make a 3D scene to illustrate a city council plan. [20 minutes]

[Start the mapping and analysis exercises](#)

2. Activate your subscription

When you purchase an ArcGIS Online subscription, you can configure your site in a way that makes sense for your organization. For example, you can set the security and sharing policies, assign privileges and credits to members based on the work they need to do, and configure your home page and gallery to reflect your brand. You can also integrate your organization's identity management system.

Main components

A subscription to ArcGIS Online is made up of the following main components:

Home page—Your home page will be many people's first impression of your site. Include an appealing banner and your own logo, feature your best maps and apps, and provide descriptions, links, or resources to help people get the most out of your site.

Groups—Groups are a way to organize your members and content around specific projects, workflows, and initiatives. You can set up groups to allow access to specific items based on your organization's structure. Groups also allow collaboration between members of other organizations.

Members—Add new users to ArcGIS Online by inviting them to join or adding them directly. You can add members in bulk or one at a time. You can set up their accounts for them, allow them to create their own accounts, or use your existing organization-specific login system.

Content—Your ArcGIS Online content includes maps, apps, and layers. It also provides resources to effectively store, categorize, edit, and share what you've created.

These main components work together to make up the ArcGIS Online experience that meets your organization's requirements.

Tips

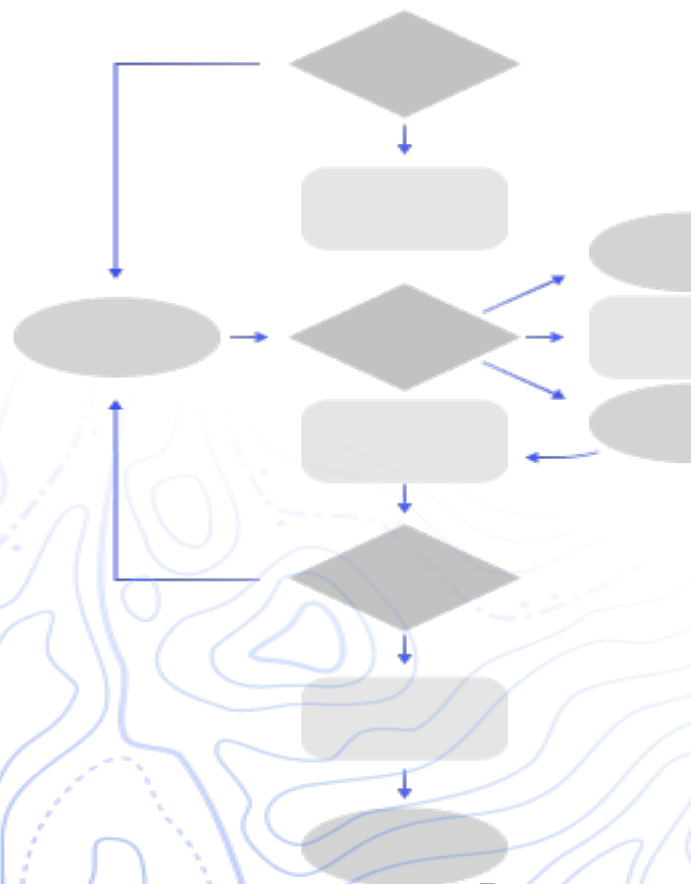
You'll need to decide the following things when you first set up ArcGIS Online:

A name for your ArcGIS Online site—The organization name is what appears in the banner on the home page. You should choose a distinct and accurate name that represents your organization or the purpose of your ArcGIS Online site.

A short name—The short name appears in the URL link to your ArcGIS Online site (for example, sample-org-name.maps.arcgis.com). Carefully consider the name you want to use. You can change it later, but you may need to manually update the URLs of some of your content.

Administrative contact—Consider having a few administrators as points of contact. These administrators and their email addresses are listed in automatic emails sent from ArcGIS Online when members request password resets, help with their user names, modifications to their accounts, or any issues related to the allocation of credits to their accounts. Contacts also get email notifications about the subscription.

[Learn how to activate your subscription](#)



3. Set up your home page

Start by configuring ArcGIS Online to meet your organization's needs. For example, you can specify whether members can search for and share content outside the organization. Some configuration is done as part of the subscription activation—for example, setting up your organization's URL. As you get started, focus on the appearance of your home page and the security settings of the site.

Customize the appearance

Think about your brand and how to best represent it on your site. Here are a few recommendations for creating an effective home page:

- Make your home page professional looking and well organized. Use a custom banner and logo and provide information about the purpose of your site.
- Showcase your best maps and apps as featured content on your home page.

[Learn how to set up your home page](#)

Security considerations

ArcGIS Online is a secure, reliable, and flexible site. You can configure the privacy and security controls that make sense for your organization. For example, you can configure the password policy, including the password length, complexity, and history requirements. You can choose to allow members to share content outside your organization or only allow sharing within the organization. You can also set up organization-specific logins and multifactor authentication.

We recommend that you allow access to ArcGIS Online, data, and all other assets through HTTPS only. This helps protect your information.

[Learn how to set up your security policies](#)

You can also review [ArcGIS Trust Center](#) for additional details about security, privacy, and compliance.

4. Create groups

Groups create structure for your organization and are a way to organize items you want to share with members of your organization and with the public. You can set up groups that are private and by invitation only or public groups that are open to everyone. With a little planning, you can use groups as a tool to support your workflows and ensure that finished content is shared with the intended audience. For example, you can create a working group and a broadcast group for items related to a project. The working group can be a private group used for sharing in-progress work. The broadcast group can be a public group used for sharing finished content with everyone.

You can also use groups to feature content on the home page and gallery and build custom galleries for basemaps and apps.

Creating groups when you set up your organization allows you to organize members and content into groups as you add them.

[Learn how to create groups](#)

Collaborations

Collaborations are trusted relationships that allow organizations to work together on content through groups. Partnered and distributed collaborations offer different methods of sharing maps, apps, layers, and more with other organizations.

[Learn more about collaborations](#)

5. Add members

ArcGIS Online has a flexible system for adding members to your organization. You can add members automatically or invite them to join your organization. You can add and invite members one at a time, or you can upload a file and add and invite members in bulk. You can enable your existing organization-specific login system, set up member accounts yourself, or allow members to create their own accounts. As part of the invitation process, you also designate user types and roles and assign members to the groups you've created.

[Learn how to add members](#)

Best practices

Below are some best practices for adding members. Most can be done as part of the invitation process.

- **Configure organization-specific logins**—If you use an organization-specific login system such as Okta or Google Workspace, add members using their SAML or OpenID Connect logins. This allows members to sign in to ArcGIS Online with their existing logins instead of creating new ArcGIS accounts.
[Learn how to configure logins](#)
- **Assign user types**—User types determine the privileges and apps you can give members. There are a variety of user types to match the way your team works. Assign user types based on the members' needs and requirements. For example, Creators have access to all the capabilities in ArcGIS Online and most of the apps, while Viewers can only view items that are shared with them and have access to a small set of apps.
[Learn more about user types](#)
- **Select roles**—Consider the privileges each member needs. You can assign privileges through a default role, or you can create custom roles based on the specific privileges you want that role to have. Every subscription must have at least one administrator.
[Learn how to configure custom roles](#)
- **Automatically add members to groups**—Specify the groups you want members to join. Members are added automatically without needing to

request membership or accept an invitation.

[Learn how to add members to groups](#)

- **Allocate a credit budget**—You can manage member credit usage by setting a specified number of credits that the member can use for transaction-based services and tools such as spatial analysis.

[Learn how to allocate credit budgets](#)

- **Manage Esri access**—Enable Esri access for members who need to use other web resources such as support, training, and forums or to manage their email communications from Esri.

[Learn how to enable Esri access](#)

- **Manage add-on licenses**—Each user type includes access to specific apps. Apps that are not included with an assigned user type can be licensed and assigned as needed to specific members as add-on licenses.

[Learn how to manage licenses](#)

- **Categorize members**—Set up hierarchical categories for organizing and filtering members in your organization according to characteristics, such as department, location, and expertise.

[Learn how to set up member categories](#)

6. Create content

ArcGIS Online includes everything you need to create and share maps, scenes, apps, notebooks, and layers. You can add existing content such as spreadsheets and ArcGIS Server services, and create new content such as maps, apps, and hosted web layers.

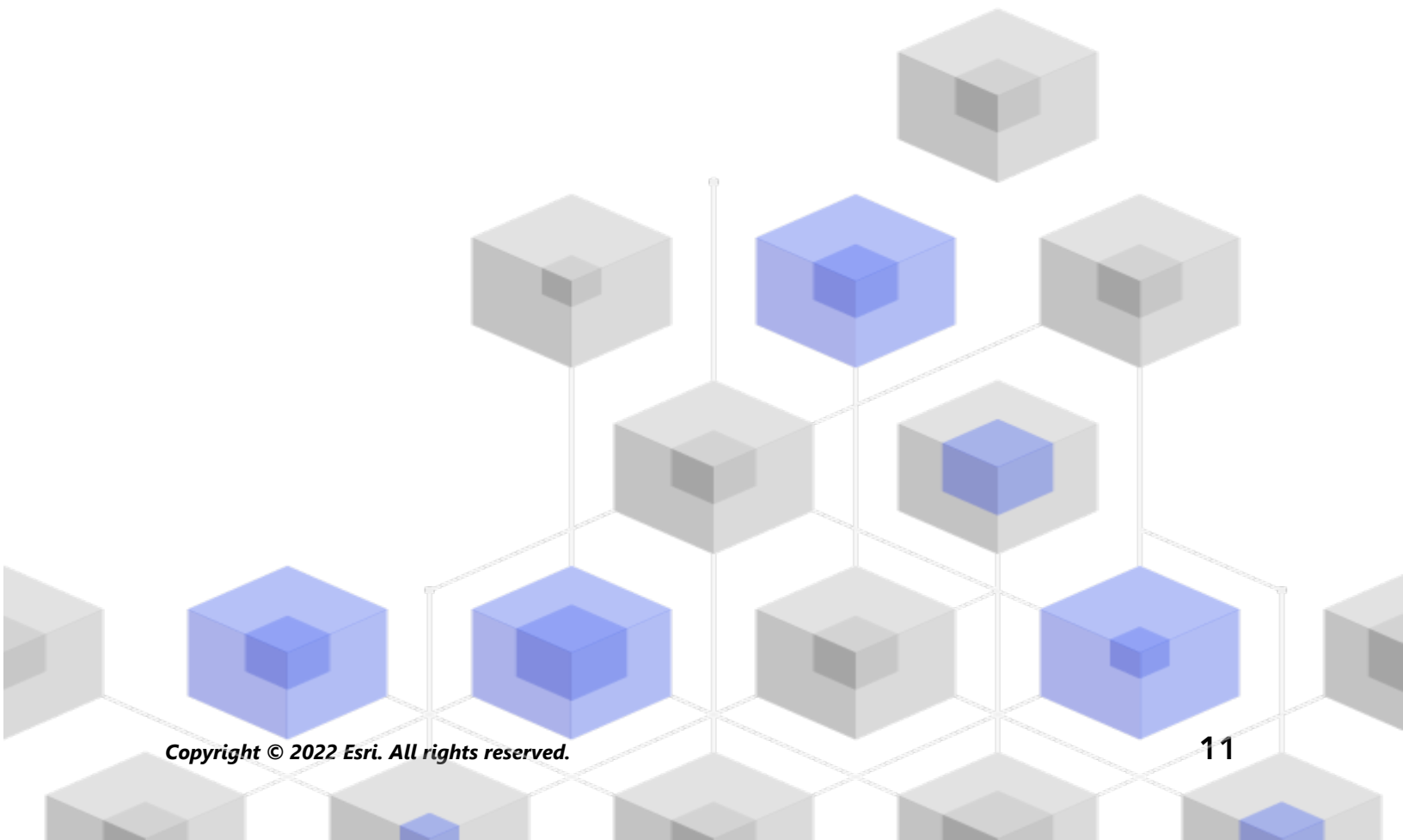
Consider how your content will be used and optimize it for the best experience. For example, refine layers with appropriate transparency, scale ranges, and labels; configure pop-ups in your maps; and create multiple views of your feature layers with different access and editing properties.

Include complete details so the item is easy to find and use. Designate items as authoritative when you want to promote them as reliable and boost them in search results. Set up content categories for your organization and groups so the content is easy to find.

Tips

- Creating a map is as simple as combining a basemap with your data. You can apply smart defaults to quickly style the map.
[Learn how to create maps](#)
- ArcGIS Online includes a wide variety of templates and widgets to help you create focused web apps.
[Learn how to create apps](#)
- You can choose from several templates to create layers for use in your maps and apps to collect data.
[Learn how to create feature layers](#)
- When you save or add your content to ArcGIS Online, it's stored as an item in My Content, where you can search all your items or browse by filters such as item type and date.
[Learn how to add items](#)
- All content has an associated item page for additional details. You can also modify item settings and access more options to interact with the item.
[Learn how to use item pages](#)

- You can use content categories to organize group content and content across your organization.
[Learn how to set up content categories](#)
- Once you've added content, you can share it with groups, your organization, or everyone.
[Learn how to share content](#)
- If your map is picked up by social media and is viewed by thousands or millions of users at once, you'll want the map to load as quickly as possible.
[Learn how to optimize maps for high demand](#)



7. Learn more

As an administrator, you're responsible for setting up ArcGIS Online. It's equally important to maintain members, items, and groups to keep your organization uncluttered and up to date. The resources in this section can help you with these maintenance tasks. They also help you learn more about ArcGIS Online.

Monitor activity

Access activity-based metrics and real-time usage reports to help monitor content and members. Item reports illustrate how users are creating, using, and sharing geographic content. Member reports reveal how users are contributing to ArcGIS Online. Group reports provide a sense of active collaborations across and within organizations.

[Learn how to use activity reports](#)

Credit usage

ArcGIS Online is a paid subscription service. Esri assigns each subscription service credits that act as currency. You use credits when using certain content, analytical functions, and data storage. You can enable credit budgeting to manage credits for transaction-based services and tools such as spatial analysis. Assign a flexible allocation of credits to some or all organization members or set a default allocation for new members.

[Learn more about credit usage](#)

Additional resources

- [ArcGIS Online help](#) is a key resource for learning how to use the software in general and to perform specific tasks. It also includes [best practices for organization maintenance](#), [what's new](#), [troubleshooting](#), and [FAQ](#).
- The [Learn ArcGIS gallery](#) has a collection of lessons, articles, stories, and videos that help you learn about ArcGIS. It also includes [paths](#) of related resources about a specific topic, such as [administration](#).

- [Esri Academy](#) includes instructor-led courses, webinars, learning plans, and other training resources to help you learn more about managing an ArcGIS Online organization.
- The GIS community, including Esri, shares thousands of ready-to-use authoritative datasets in [ArcGIS Living Atlas of the World](#). ArcGIS Living Atlas covers everything from historical census data to environmental conditions derived from live sensor networks and earth observations.
- [ArcGIS API for Python](#) can help you expedite and maintain administrative tasks. For example, use the API to set up the folder structure in My Content. You can also use it to update URLs for service or app items.
- [ArcGIS Marketplace](#) includes solutions from Esri partners to help with administrative tasks.
- Get the latest information on service availability from [ArcGIS Online Health Dashboard](#).

FAQ

Can I try ArcGIS Online before purchasing a subscription?

Yes. If you don't have an account yet, you can sign up for a 21-day free [Learn ArcGIS education trial](#). The education trial is an easy way to explore mapping and analysis, but you won't be able to set up or administer ArcGIS Online. You also lose any content you created at the end of the trial. To try configuring an ArcGIS Online organization, you can get a [free ArcGIS trial](#). With an ArcGIS trial, you act as the administrator of your trial organization. You have the option to purchase a subscription at the end of the trial and continue using the organization and the content you created.

Can I add more members or credits?

Yes. ArcGIS Online subscriptions have the flexibility to grow with your organization. You can [add more members or credits](#) at any time.

Where can I get answers to more questions?

Read the ArcGIS Online [FAQ](#), explore [Esri Community discussions](#), or contact [Esri](#).