



Administering Your Location Platform

Best Practices and Resources



www.esri.com/AdminResources
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Checklist for Administering Your Location Platform

Task	Link	Complete
1. Introduction to ArcGIS		
• What is ArcGIS?	ArcGIS Online Overview	<input type="checkbox"/>
• About the platform	ArcGIS Platform Deployment	<input type="checkbox"/>
• Check system health	ArcGIS Online Health	<input type="checkbox"/>
• Esri Partners	The ArcGIS Online Specialty	<input type="checkbox"/>
• Esri Professional Services	Esri Services Packages	<input type="checkbox"/>
• Esri Support Services	Esri Support Site	<input type="checkbox"/>
2. Activate and Set Up Your Site		
• Activation process	ArcGIS Online Help	<input type="checkbox"/>
• Configure the ArcGIS Online website	ArcGIS Online Help	<input type="checkbox"/>
3. View Your Organization's Status		
• Understand your subscription plan	ArcGIS Online Subscription Plans	<input type="checkbox"/>
• View and monitor subscription status	ArcGIS Online Help	<input type="checkbox"/>
• Understand credits	ArcGIS Online Help	<input type="checkbox"/>
4. Control Access		
• ArcGIS Online security overview	Trust ArcGIS	<input type="checkbox"/>
• Configure security settings	ArcGIS Online Help	<input type="checkbox"/>
• Create your first group	ArcGIS Online Help	<input type="checkbox"/>
• Share data with the public	ArcGIS Open Data	<input type="checkbox"/>
5. Manage People		
• Invite and add members	ArcGIS Online Help	<input type="checkbox"/>
• Configure roles	ArcGIS Online Help	<input type="checkbox"/>
• Set up enterprise logins	ArcGIS Online Help	<input type="checkbox"/>
6. Organize and Share Content		
• Share items	ArcGIS Online Help	<input type="checkbox"/>
• Configure groups	ArcGIS Online Help	<input type="checkbox"/>
• Configure gallery	ArcGIS Online Help	<input type="checkbox"/>
• Share groups	ArcGIS Online Help	<input type="checkbox"/>
7. Get Apps for Your Organization		
• Apps for everyone	Apps overview	<input type="checkbox"/>
• Apps for the field	Apps for the Field overview	<input type="checkbox"/>
• Apps for the office	Apps for the Office overview	<input type="checkbox"/>
• Apps for the community	Apps for the Community overview	<input type="checkbox"/>
• App builders	App Builders overview	<input type="checkbox"/>
• Manage licenses	ArcGIS Online Help	<input type="checkbox"/>
8. Stay Informed		
• Join the Esri Community	GeoNet	<input type="checkbox"/>
• Follow blogs	ArcGIS Online Blog	<input type="checkbox"/>
• Receive publications	Esri Publications	<input type="checkbox"/>
• Watch videos	E360	<input type="checkbox"/>
• Industry success stories	ArcGIS Online: Case Studies	<input type="checkbox"/>
• How ArcGIS is used in different industries	Industries	<input type="checkbox"/>
• Lifelong learning	Esri Training	<input type="checkbox"/>

1

Introduction to ArcGIS

ArcGIS connects people with maps, data, and apps through geographic information systems (GIS). ArcGIS software is used by Fortune 500 companies, national and local governments, public utilities, and tech startups around the world. It is a location platform that's accessible to anyone, anywhere, anytime.

ArcGIS Online is an online, collaborative web GIS that allows you to use, create, and share maps, scenes, apps, layers, analytics, and data. The system allows you to host data, match addresses, get directions, and perform spatial analytics. You get access to **Living Atlas of the World**, comprised of authoritative maps and data on thousands of topics, as well as Esri's secure cloud, where you can add items and publish web layers. You can also work directly with other parts of the ArcGIS system, including ArcGIS Enterprise, ArcGIS Desktop, apps, solutions, and **developer resources**.

Platform architecture



The graphic illustrates how ArcGIS Online, your portal, consists of a core system that you can interact with from your organization's advanced desktop tools, the ArcGIS Online website, and mobile apps. You can monitor the status of the system by going to the **ArcGIS Online Health Dashboard**. This resource provides status information that has been verified as having affected the majority of ArcGIS Online users.

As an administrator, you may find yourself looking for Esri partners with skills and experience in delivering ArcGIS Online apps and services. The **ArcGIS Online Specialty** designates partners in the Esri Partner Network who can help users with everything from getting started with ArcGIS Online to developing and producing custom apps that take full advantage of web GIS. You may also be interested in **Esri Services Packages**, which are short-term, high-

impact services that provide knowledge transfer, best practices, and consulting support for a variety of Esri products, including ArcGIS Online. Services Packages are delivered by Esri professionals to assist you with implementing Esri products faster and becoming self-sufficient with Esri technologies.

As you work through this guide, you may have questions about your implementation. If you can't find the answer using the resources provided within, please feel free to reach out to [Esri's Support Services](#) team.

2

Activate and Set Up Your Site

As the designated administrator of your ArcGIS Online organization, your first step is to **activate your ArcGIS Online subscription** using the activation link in the email you receive from Esri. After that, as the administrator, you will receive additional emails with links to ArcGIS apps, announcements on future updates to the platform, and notifications on subscription renewal and low credit balance. The activation link and credit balance notifications are sent from service@esri.com, which may get filtered to your spam or junk email folder. To make sure you receive these messages, add this address to the list of safe senders in your email client. These announcements will be sent to any member in the administrator role.

After you activate your subscription, configure your ArcGIS Online website to meet your needs and match your branding. You can **configure general settings**, like the organization logo and name, the default language, the region, and the Contact Us link. It is recommended that you specify a personal or corporate alias for the Contact Us link that will appear in the footer across your ArcGIS Online website. You can also **customize the look and functionality of the home page**. Select or create a custom background image and banner, and **craft a description** that will help inform those who use and visit your ArcGIS Online organization. Furthermore, use the content within a group to populate the featured content ribbon on your home page. This is a great way to showcase maps and apps and provide one-click access to content. These settings can be modified in the future if your needs change.

3

View Your Organization's Status

When you activate your ArcGIS Online subscription, a predefined number of named users and service credits are allocated to your organization based on the designated **subscription plan**. Service credits are the currency of ArcGIS Online and are used across the platform in exchange for storage space and the use of certain functions, such as spatial analysis, routing, or geocoding.

As an administrator, you can effectively manage your ArcGIS Online organization by quickly and easily accessing real-time **status** reports. You can view general information about the organization, such as the subscription renewal date and how many credits remain, and interactive, detailed usage reports. Reports are organized into five categories: credits, content, apps, members, and groups. The available reports vary according to which category you are viewing. Many of the charts, tables, and lists include interactive drill-down and drill-through reports that reveal specific information as you interact with them.

Credits reports include summary charts that show credit usage over time and usage by type. The Credit Utilization Chart reports credit usage for storage, analytics, subscriber content, and published content. You can explore credit usage for a specific period of time by adjusting the start and end dates, and you can also export usage data as a CSV file. Administrators will receive **email notifications** when the organization has used 75 percent and 100 percent of credits. Much like reviewing a monthly utility bill, monitoring credit usage is an excellent way of knowing how your organization is being used and **predicting how many credits you will need** for an extended period. If you would like more fine-tuned control over credit usage, consider implementing a **credit budget** that assigns a flexible allocation of credits to some or all organization members.

Content reports illustrate how members of your organization are creating, using, and sharing content. Reports include commonly used tags, trending content, and most popular content. **Apps** reports give you detailed insights into how ArcGIS apps, which include those built with configurable apps and app builders, are used in your organization.

You can gain an understanding of the status of your organization's members and their activities by viewing the **Members** reports, which display members by role and credit usage, as well as utilization summaries and statistics for each member of your organization. If you are interested in how your members are collaborating within your organization, explore the **Groups** reports. These reports display data regarding the number of groups, group owners, and group sharing settings.

4

Control Access

ArcGIS Online is a secure, reliable geographic information system (GIS) delivered using the software-as-a-service model. Esri's security strategy is based on an industry-standard, defense-in-depth approach that provides security controls at every level, for every user, including the application, network, and facilities. Adherence to these **security principles** helps ensure that ArcGIS Online provides confidentiality, integrity, and availability of data.

As an administrator, you can **configure security settings** that meet the needs of your organization. You can modify policies, sharing and searching, password policies, enterprise logins, sign in options, multifactor authentication, and trusted servers. For example, you can configure the password policy for your organization, including the password length,

complexity, and history requirements. You may also choose to allow members to share content outside your organization. It is important to note that if you disable this setting, users and publishers can only share with other members within the organization. However, administrators can still share content publicly. This added level of control will ensure that only your most trusted members can make maps publicly accessible.

With the website initially configured, you can **create groups** for the functional teams or business units that will use the organization. Groups can be used to share data and maps with a focused audience, including audiences between organizations. They can also support team workflows by allowing members to share content with one another. After these groups have been created, you can assign new members to the appropriate groups based on a project, team, or business unit.

If your organization plans to share its data with the community, you may want to create a group that populates an **ArcGIS Open Data site**. Esri-hosted ArcGIS Open Data gives you a quick way to set up public-facing websites where people can easily view, use, and even download your organization's authoritative open data in a variety of formats. As an administrator, you can configure the site with your organization's brand and data shared to a designated group.

5

Manage People

Organizations **add members** by inviting them to join or adding them directly. You can send invitations or add members one at a time, or you can upload a file and send invitations or add members in bulk. As part of the invitation process, you can add members to groups, set credit allocations, and assign roles.

Each member of your ArcGIS Online organization should be assigned a **role** that provides the functionality required to complete their workflows. A role defines the specific privileges that a member has within the organization. The default user, publisher, and administrator roles contain a set of predefined privileges for common workflows such as consuming content and curating data. If you find that you need more control and flexibility than what a default role offers, you can **create a custom role** where **specific privileges** can be enabled or revoked. For example, you may want to create a role for members who can only view maps, or another role that provides some administrative responsibility for managing members. When you change a member's role, you should ensure that the member understands the new responsibilities and controls you have granted.

ArcGIS Online supports **enterprise logins**. This means that instead of using ArcGIS logins, you can allow members of your organization to sign in to ArcGIS Online using the same logins they use to access your enterprise information systems. The advantage of setting up enterprise logins is that members do not need to create additional logins within the ArcGIS Online system; instead, they can use a login with which they are already familiar.

In addition to adding members and assigning roles, you as the administrator can **manage their accounts**. You can view and make changes to any member's content, group membership, and profiles. Members should be encouraged to keep an up-to-date and **complete profile**, as this will help provide other members in the organization with information about content authors. When appropriate, you also have the ability to remove or disable accounts. It is helpful to disable a former employee's account while you are working on reassigning that person's content and groups to other members before removing the account completely.

6

Organize and Share Content

When creating maps, layers, and other items in ArcGIS Online, you have the option of leaving them unshared or **sharing items** with groups, your organization, or everyone. You can also **share an item** with a combination of your organization, groups, and everyone. If you choose not to share the item, only you (and the organization's default administrators) can access the item until you share it. Until they are shared, your maps, apps, and other items are not available to others—for example, they do not appear in search results and aren't part of any group. If you make an item public (that is, share it with everyone), it is accessible by everyone, including anonymous users, even if your organization does not allow anonymous access to its website.

Groups offer a convenient and simple way to organize items for access within your organization and publicly. With a little bit of planning, groups can be used 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 particular project. The working group can be a private group used for sharing in-progress work, whereas the broadcast group can be a public group used for sharing finished content with everyone. In addition, you can use groups to **share private content from your ArcGIS Online organization with another ArcGIS Online organization**. When creating any group, it is important to establish a defined purpose and include only the appropriate users as members of the group.

As an administrator, you can use groups to populate the **organization's Gallery**, which highlights items from your organization. After choosing to showcase the contents of a specific group, you can change how the items are sorted within the Gallery. You can sort by title, owner, date, rating, or the number of views. Groups can also be used to create **gallery apps** that display the items in a group and the group details, such as the name and description. Gallery apps are configurable and offer different options for customizing the appearance and behavior of the app.

Get Apps for Your Organization

Esri has a number of focused apps designed to make your work easier, faster, and more efficient. From field data collection to working with colleagues in your office and sharing your work out to the community, apps are a powerful extension of your web GIS. Most of these apps are included with your ArcGIS Online subscription, while premium apps are available for an additional cost.

Apps for the field help you use the power of location to improve coordination and achieve operational efficiencies in field workforce activities. Reduce or even replace your reliance on paper. Ensure that everyone in the field and the office uses the same authoritative data so you can reduce errors, boost productivity, and save money. Apps for the field include integrated workflows for efficient field operations. This suite includes apps like **Collector for ArcGIS** and **Survey123 for ArcGIS**.

Use **apps for the office**, including the ArcGIS Desktop app **ArcGIS Pro**, to make decisions that save money and time, whether you're an operations manager who needs to see the location of assets or a market analyst interested in understanding consumer profiles in a targeted region. Visualize your data in a geographic context and gain location-based insights that you would otherwise miss.

When you are ready to share information and stories with the public at large or particular stakeholders, use **apps for the community**. With more than thirty different **configurable app templates** and the powerful storytelling capabilities in **Esri Story Maps**, you and your organization's members can create engaging web apps that can be used inside your organization, embedded on websites, or shared with the world. In addition, you can use **ArcGIS Open Data** to make your authoritative data accessible via a public-facing website.

If you would like to build your own apps, you can use **app builders**, like **AppStudio for ArcGIS**. You can build amazing apps using your own brand without doing any coding. Use templates to build web or native apps that work on all devices and all platforms, and add advanced functionality to your apps with widgets that you simply drag, drop, and configure.

As an administrator, you use ArcGIS Online to specify which members have licenses for Esri premium apps like **ArcGIS Pro**, **Navigator for ArcGIS**, **AppStudio for ArcGIS Standard**, **Drone2Map for ArcGIS**, and other apps sold through **ArcGIS Marketplace** that use a per-member license type. You can view **license details** and configure licenses for **one member** or **multiple members**. ArcGIS Pro has additional licensing options for assigning a software level and extensions for specialized tools.

Stay Informed

To make the most out of your investment, it is important to stay informed regarding the latest updates to ArcGIS software, best practices, GIS use cases in your industry, and user success stories. There are a number of ways in which you can keep current.

Make **GeoNet** your first stop. Esri has provided a community platform, much like a social network, with spaces focused on industries and products. Join the rest of the Esri community on GeoNet by engaging in discussions with other users, reading or writing blog posts, collaborating on documents, sharing videos, submitting **ideas** for new tools and features, and so on.

Follow the **ArcGIS blog** to pick up valuable tips and tricks, learn details about new software releases, and be privy to important announcements, like new MOOC offerings. Similarly, subscribe to **Esri publications** to learn how other organizations are using GIS, discover best practices, and acquire technical solutions from other users.

Subscribe to **E360**, Esri's home base for videos. View videos from the annual Esri User Conference, including plenary speakers and technical workshops, as well as videos featuring specific products or industries. Additional ArcGIS Online-specific case studies can be found on the **ArcGIS YouTube channel**, while the **Industries** page features detailed information on how ArcGIS products are used in particular industries. Each industry page includes case studies, interactive demos, announcements, and more.

Deepen your knowledge of ArcGIS software with **Esri Training**, your location for lifelong learning. From self-paced e-Learning courses to instructor-led classes, you can take advantage of content that suits your learning style and availability. Start learning right away or add content to your Wish List, and track your progress on a personal dashboard.