ArcGIS Online Steps for Success
A Best Practices Approach for Your Organization

Bern Szukalski
Jeff Archer
ArcGIS Online Accounts

Public Accounts

• No charge
• Personal use (or qualifying organizations)
• Basic features and capabilities

Organizational Account

• Via subscription / ELA
• Business / professional use
• Full capabilities (publishing, access premium services)
• Management framework and tools
Establish The Vision and Governance

Cultivate and support your advocates
Vision & Governance

- What is the mission and vision?
- What problems will it solve?
- What are the deliverables?
- Who is the audience?

- Establish a curator, or group of curators
- Form a governance committee
Things to consider

• Prototype and test before rolling out
• Experiment, then implement success
• Establish essential procedures and guidelines
• Be flexible, adapt, and evolve
• Communicate early, often, and well
Configure Your Portal

Establish your presence and your brand
Your Home Destination

Public / Esri Home
arcgis.com/home

Your Organization
<org>.maps.arcgis.com

Not necessarily a public destination!
Configuration & Settings

• URL and logo
• Home page (banner and background)
• Featured content (gallery ribbon)
• Gallery
• Map
• Security Settings
Logo and Portal Look and Feel
Groups are organization building blocks

Consider

• Consistent visual queues
• Consistent naming convention
• Well-documented
• Color coded
Basemap and App Galleries

Custom basemap and basemap gallery

Custom app templates
Establish visual queues for your authoritative shared content
Organization Persona

Establish organization persona for authoritative shared content
DEMONSTRATION & DISCUSSION
Map Your Organization Using Groups

Tailor your organization to… your organization
Organization or Project Chart
DEMONSTRATION & DISCUSSION
Provision and Organize Useful Content

Create maps that interest and engage.

Listen to your GeoRealtor: Content, content, content…
ArcGIS Services
Great documentation starts at the source

Services Directory
Maps vs. Layers
Basic Map of Greenville SC

Basic Layer Map allows you to create your own map using authoritative content from the City of Greenville through our participation in ESRI's Community Maps program. Also includes dynamic map services of basic overlay map layers.

Description

This web map serves as a base layer map for public use through ArcGIS Explorer Online. It utilizes the basemap content provided to the GIS community through our participation with ESRI's Community Map program which is updated on a semi-annual basis. In addition to an accurate basemap, a variety of commonly requested layers are included in this map through a real time link to the source data. These additional map service layers include: Parcels - Tax parcel boundaries with ownership data; Buildings - Structure footprints; Address Points - Structure addresses; Street Centerlines; Points of Interest; Streams or Rivers; Lakes and Ponds; Greenville City Limit

Please note that some layers included in the base layer map are scale dependent. As a result, you will not be able to view certain layers until you are zoomed in to level 18 (1:2,500).

Access and Use Constraints

Please note that the City of Greenville is not responsible for street and railroad data above the 1:10,000 scale. We are actively working to provide updates to vendors to improve data quality.

While reasonable efforts have been taken to establish the accuracy of the map and the data it reflects, the City of Greenville expressly disclaims responsibility for damages or liability that may arise from the use of this map. This map is for general reference only and should be used at your own risk.

Map Contents

Greenville Base Layers:
http://gis.greenvillesc.gov/ArcGIS/rest/services/BaseMaps/GreenvilleBaseLayers/MapServer
Thumbnails

Geographic

Graphic

Organization Branding

Content
DEMONSTRATION & DISCUSSION
Create Useful Information Products

Useful information supports your organization, and establishes value, support, and adoption.
ArcGIS Online Configurable Web Apps

- Easy to configure
- No programming
- Hosted
- Source download
Apps for ArcGIS
DEMONSTRATION & DISCUSSION
Invite Users

Rollout your organization, and teach users your best practices
Invite organizational members

Invite users via pre-established logins (recommended) or by using existing account

Enterprise logins (beta)
## Roles

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Username</th>
<th>Date Joined</th>
<th>Role</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abraham Lincoln</td>
<td>jeremy.lincoln</td>
<td>Mar 24, 2012</td>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Anthony Puzzo</td>
<td>knights00</td>
<td>Sep 23, 2011</td>
<td>Administrator</td>
<td></td>
</tr>
<tr>
<td>Barack Obama</td>
<td>bws01_guest</td>
<td>May 11, 2012</td>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Calvin Coolidge</td>
<td>bws01_user6</td>
<td>Aug 27, 2011</td>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Dick Nixon</td>
<td>dnixon</td>
<td>May 24, 2012</td>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Dwight Eisenhower</td>
<td>bws01_user5</td>
<td>Aug 27, 2011</td>
<td>Publisher</td>
<td></td>
</tr>
<tr>
<td>Franklin Delano Roosevelt</td>
<td>bws01_user4</td>
<td>Aug 15, 2011</td>
<td>User</td>
<td></td>
</tr>
</tbody>
</table>

AGOL Steps for Success:

- Manage items
# Roles in the Organization

<table>
<thead>
<tr>
<th></th>
<th>User</th>
<th>Publisher</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add items</td>
<td>ü</td>
<td>ü</td>
<td>ü</td>
</tr>
<tr>
<td>Create web maps</td>
<td>ü</td>
<td>ü</td>
<td>ü</td>
</tr>
<tr>
<td>Share content</td>
<td>ü</td>
<td>ü</td>
<td>ü</td>
</tr>
<tr>
<td>Participate in groups</td>
<td>ü</td>
<td>ü</td>
<td>ü</td>
</tr>
<tr>
<td>Customize Site</td>
<td></td>
<td></td>
<td>ü</td>
</tr>
<tr>
<td>Publish hosted services</td>
<td></td>
<td>ü</td>
<td>ü</td>
</tr>
<tr>
<td>Manage the organization &amp; other users</td>
<td></td>
<td></td>
<td>ü</td>
</tr>
</tbody>
</table>
DEMONSTRATION & DISCUSSION
Connect With Enterprise Systems

Your value is contingent upon how you integrate with existing systems, processes, workflows
Esri Maps for Office
Support Office workflows and users

Mapping, discovery, enrichment, participation
Extend your reach through apps
Promote Your Organization

Evangelize and promote your value using real examples and real value propositions
QUESTIONS AND WRAP-UP
Thanks!!

Bern Szukalksi
@bszukalski

Jeff Archer
@vee_dubb