

ESRI ARCGIS® ONLINE ADMINISTRATORS' REFERENCE GUIDE



Create report schedule ✕

Report type

Item
A report listing the attributes of each item in your organization

Name

Monthly_OrganizationItems

Daily Weekly **Monthly** Quarterly

Day of the month

First day of the month

Start date

11/23/2022

Reports will be a snapshot of the current state of items, starting at 12:00 am UTC.
[Learn more about item reports.](#)

End

Never

Create schedule Cancel

Administrative Reporting

- Let the technology work for you – schedule Activity Reports.
 - Go to *ArcGIS Online*.
 - Go to *Organization*.
 - Click on *Create Activity Report*.
 - Then hit *Cancel*.
 - Open the dropdown in *Create Report*.
 - Select *Schedule Report*.
 - Schedule reports at your business convenience.
 - Recommend monthly.

Resource: [ArcGIS Online](#)

Manage notebooks **New notebook** ▾

Standard
Ideal for administrative tasks, light analytics, and data engineering workflows.

Advanced
Ideal for advanced analytics, large scale data engineering, and some machine learning workflows.

3 credits per hour

Advanced with GPU support
Ideal for intensive workflows such as big data analytics, model training, and model inferencing.

30 credits per hour

Administrative Python Scripting

- Leverage ArcGIS Online Notebooks to run administrative steps.
 - *With Notebooks' tasks capabilities, automate admin procedures on an as-needed basis.*
- Esri has a set of existing Notebook scripts ready to use within ArcGIS Online
 - *Follow source link.*
- Key element to remember with Notebook is there are different versions available.
 - *For Administration steps, only Standard Version is needed.*
- Administrative Notebooks.
 - *Deploy Automatic Notifications: push notifications to email, SMS, Zapier, Slack, Twitter.*
 - *Manage and Allocate credits: batch manage and assign credits.*
 - *Manage Inactive Users: email and disable inactive users.*
 - *Validate User Profiles: align corporate policies with ArcGIS Online organization.*
 - *Identify Insecure Items: transition from http to https.*
 - *Check for broken URLs: did something change and it wasn't noticed?*

Source: [Esri Sample Notebooks \(arcgis.com\)](https://arcgis.com/sample-notebooks/)

Resource: [Managing ArcGIS Online Content with ArcGIS Dashboards and ArcGIS Notebooks \(esri.com\)](#)

Credits

Credit allocation

Manage and control expenditures by crafting a budget that assigns a flexible allocation of credits to some or all organization members. An allocation of any amount can be assigned to your members one at a time or as part of a bulk operation. Allocations for members may be modified at any time. [Learn more about credit management](#)

Enable credit budgeting tools

Show each member's available credits on their settings page

Credit Allocation

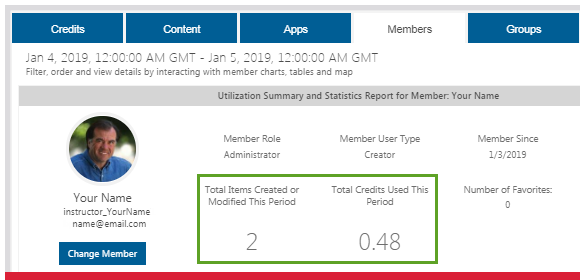
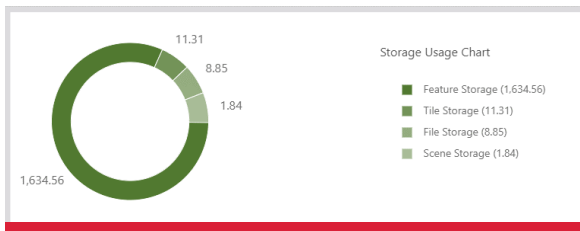
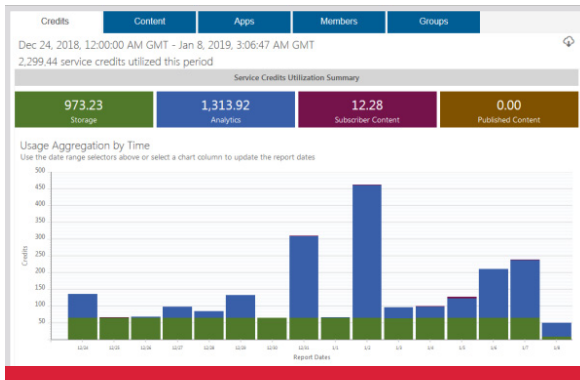
- Under Settings, go to Credits and turn on.
 - *Enable credit budgeting tools.*
 - *Show each member's available credits on their settings page.*
- Under Settings, go to New Member Defaults.
 - *Set default credits allocation per user.*
- See Python script section to notify users when they run out of credits.

Source: [Configure credits—ArcGIS Online Help | Documentation](#)

Credits

Set the credit allocation members are assigned by default when adding or inviting new members.

Set allocation to: 25 Organization credits:

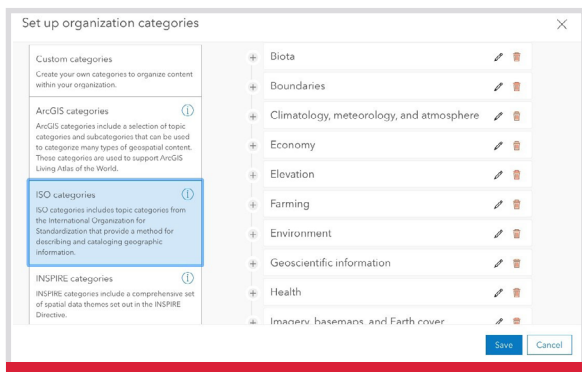


Esri ArcGIS Online Management

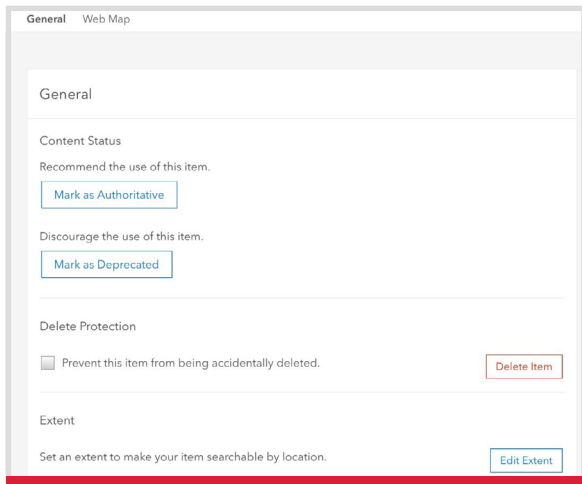
- Review credit usage, members, items created, and audit items shared with internally and publicly for organization guidelines and policy compliance.
- Watch large items which consume credits.
- Create standard operating procedures to clean up outdated items.
- Develop tag management scheme to better organize and be prepared for open data.
- Develop category scheme.
- Customize base map gallery with organization-specific needs.
- Create list of essential accounts that administer content.
- Coordinate Esri ArcGIS Online steering committee to create guidelines and share information.
- Subscribe to Esri newsletters and email lists.
- Create professional graphics for your Esri ArcGIS Online site.
- Leverage ArcGIS Hub sites for open data, training, and project sites.

Esri ArcGIS Online User Management

- Invite or add members.
 - Create default role for all new users.
 - Set credit budget to avoid unneeded credit usage.
 - Implement default allocation for new members.
- Link Esri ArcGIS Online authentication to Enterprise identity providers, i.e., Active Directory, Azure AD, or Okta.
 - Allows single sign-on to Esri ArcGIS Online.
 - Eliminates user password management.
 - Creates innovation by giving access to GIS tools.
- Move items between members of an organization by using Esri ArcGIS Online change owner tool.
- Implement two-factor authentication.
- Add role-based user management.



Administrator	1	Default
Data Editor	0	Default
Publisher	0	Default
Student	0	Custom
User	0	Default
Viewer	0	Default



Content Management

- Create naming convention for groups and items.
- Organize content folders with projects or like items.
- Establish and implement policies to direct internal sharing.
 - Recommendation: don't rely on a single person to manage.
- Maintain authoritative attributes for maps, layers, and apps.
 - Add authoritative tags.
 - Define access use and constraints of public items (<https://creativecommons.org/>).
 - Define categories.
 - Delete protection enabled.
 - Employ professional graphics.
 - Fill out credits.
 - Maintain minimum metadata.
 - Set authoritative flag.
 - Set proper extent of features and maps.
 - Create views of non-editable feature services for public consumption.

Group Management

- Develop image color scheme for groups.
 - Green for public.
 - Red for office groups.
 - Orange for the rest of organization.
- Create naming convention for groups.
- Identify trusted users who can create groups.

Esri Resources

- [Esri ArcGIS Online Administration | Learning Plan](#)
- [Introducing ArcGIS Companion - New Mobile App for Your Organization \(esri.com\)](#)

Questions

Contact GeoDecisions to learn how to implement these and other best practices.

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Go Mobile

Use the ArcGIS Online Mobile Application, it's handy!



ArcGIS Companion on the App Store (apple.com)



ArcGIS Companion - Apps on Google Play

