Quick Start Guide to

ArcGIS Online

esri

ArcGIS Online Quick Start Guide

ArcGIS℠ Online is a cloud-based mapping platform for organizations. Users get access to dynamic, authoritative content to create, collaborate, catalog, and share maps, data, and applications with each other, the entire organization, or the public. Through ArcGIS Online, organizations gain private access to the secure Esri® cloud, which is scalable and ready to use. ArcGIS Online requires no additional hardware or software and is available through an annual subscription.

This guide is a tutorial designed to get you started using ArcGIS Online. It provides short instructions for the common tasks performed by the three ArcGIS Online user roles: administrator, publisher, and user. More details and information are available through ArcGIS Online Help at esri.com/agolhelp.

Administrators
Setting Up ArcGIS Online for Your Organization

ArcGIS Online administrators have the ability to customize the ArcGIS Online website to match the organization's brand and needs. This includes adding a logo, banner, organization name, and description; setting up a unique URL; adding content to feature in the gallery; choosing a default basemap; and configuring the security settings.

Customizing Your ArcGIS Online Home Page

After you've activated your ArcGIS Online account and logged in, you will be sent to the setup page. Follow the steps below:

1. Enter your **organization's name** the way it will appear on your ArcGIS Online front page.

2. Specify a **short name** for your organization. This will be part of your unique URL.

3. Choose a default language for your organization. This language will be used in the user interface as well as control how time, date, and numerical values appear. More than 20 languages are supported.

4. Set the **region**. The region determines the default basemap, the basemap gallery, and the extent for the new maps users create. Content for more than 60 regions is available.

5. Choose your **security** settings. You can choose to allow access through Secure Sockets Layer (SSL) only, which encrypts all data during transport over the Internet. This setting is intended for organizations that only access their own content or content from other SSL organizations.

You can also choose to allow anonymous access. This means anybody can access the pages of your organization's ArcGIS Online website. However, content items and groups still maintain their sharing properties.

Finally, you can choose to allow members to share content or search for content outside your organization.

Viewing Your ArcGIS Online Subscription Status

To view the subscription status, do the following:

1. Verify that you are logged in.
2. Click the **My Organization** link on the top navigation bar.
3. Click the **Show Statistics** link under the **Subscription Status** section of the page.

Administrators can view detailed reports about their organization's storage, computation, and bandwidth usage. Each report displays the number of units and credits used over a selected amount of time (e.g., the last 24 hours or the current month) in a table as well as in charts. General information about the organization is also displayed, including how many members are in the organization and how many service credits remain.
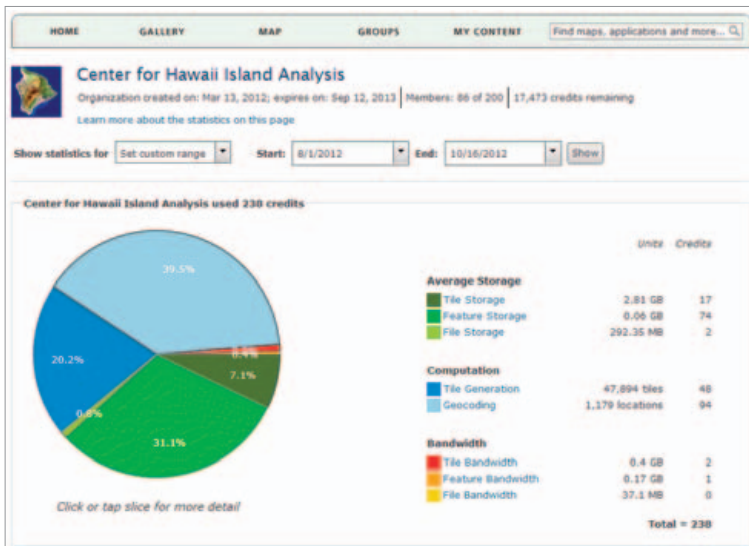
Adding Users to the ArcGIS Online Organizational Account

An ArcGIS Online administrator can add users to an organization's ArcGIS Online subscription by simply sending an e-mail invitation with preestablished logins or allowing users to create their own account logins.

The administrator also sets the user roles. Each member of an organization can be assigned a user, publisher, or administrator role. Users cannot publish content or manage the organizational site. Publishers can publish content but not manage the organizational site. Administrators have full access to the site. We recommend that you designate more than one administrator.

Inviting Users by Preestablishing Their Login

To invite users by preestablishing their logins, do the following:

1. Verify that you are logged in and that you are the administrator of the ArcGIS Online account.
2. Click the **My Organization** link in the top banner.
3. Click **Invite Users to Organization**.
4. Select **Pre-establish logins for the users to be invited** to create logins for the users you are inviting.
5. Click **Next**.
6. Click the **One at a time** tab to create each login separately. **Note:** You can also select the **From a file** tab to upload a file of logins.
7. Fill in the following fields: **Email**, **First Name**, **Last Name**, and **Username**. The user name must be between 6 and 24 characters in length and contain letters, numbers, or a combination of both. Special characters and spaces are not allowed. The user name is case sensitive.
8. Select a role. You can select **User** or **Publisher** only. You can change the role to administrator after the user has joined the organization.
9. Enter a message that the user will see as part of the e-mail invitation.
10. Click the **Review Invitation(s)** button and verify the information.
11. Click the **Invite Another** button to add an additional user to your invitation.
12. Click the **Send Invitations** button when you are ready to send the invitation. An e-mail invitation will be sent with information on how to join the organization.

## Inviting Users Who Join with Their Own Login

To invite users who will create their own logins, follow these steps:

1. Verify that you are logged in and that you are the administrator of the ArcGIS Online account.
2. Click the **My Organization** link in the top banner.
3. Click the **Invite Users to Organization** button.
4. Select **Have invited users join using either their existing logins or by creating their own logins**.
5. Click **Next**.
6. Click the **One at a time** tab to set up invitations one at a time. **Note:** You can also select the **From a file** tab to upload a CSV or text file.
7. Fill in the following fields: **Email**, **First Name**, and **Last Name**.
8. Select a role. You can select **User** or **Publisher** only. You can change the role to administrator after the user has joined the organization.
9. Enter a message that the user will see as part of the e-mail invitation.
10. Click the **Review Invitation(s)** button and verify the information.
11. Click the **Invite Another** button to add an additional user to your invitation.
12. Click the **Send Invitations** button when you are ready to send the invitation. An e-mail invitation is sent with information on how to join the organization.

Publishing Hosted Services

You can publish your maps and data as web services that are hosted in ArcGIS Online. These web services can be accessed by desktop, web, and mobile applications from anywhere on the Internet if you choose to allow it. There are two types of hosted services: tiled map services and feature services. You can publish both of these services directly from your desktop without installing your own server. You can also publish tiled map services in the ArcGIS Online map viewer using an existing feature service or tile package. And you can publish a hosted feature service directly from ArcGIS Online. Feature services support vector feature querying, visualization, and editing and are most appropriate for operational layers that go on top of reference layers (i.e., basemaps).
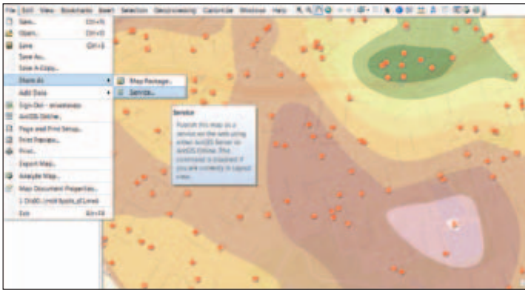

Publishing a Hosted Tiled Map Service from ArcGIS 10.1 for Desktop

1. Start ArcGIS® 10.1 for Desktop and open the map you want to publish in ArcMap™.

2. Click **File > Sign In**.

3. Type your name and password for ArcGIS Online and then click **Sign In**.

4. Click **File > Share As > Service**.

5. Choose **Publish a service** and click **Next**.

6. In the drop-down list of connection types, choose **My Hosted Services**. Then type a name for your service and click **Continue**.

7. In Service Editor, set the properties that you want for your service. Here you can choose what users can do with your service and take fine-grained control of how the server will expose your service.

8. In the left pane of Service Editor, click **Capabilities**; check **Tiled Mapping** to expose your map as a tiled map service.

9. Click the subitem **Tiled Mapping** in the left pane of Service Editor to set advanced properties relating to what clients can do with the service.

10. Click the **Caching** item to set properties for the tile cache.

11. In the left pane of Service Editor, click **Item Description** and enter a summary and tags for your service. You'll need to enter this information before you can publish the service.
    Note: Tags are words or short phrases that describe your item and affect how easily it can be found by others. Separate your tags with commas. **Federal land** is considered one tag, whereas **Federal, land** is considered two tags.

12. In the left pane of Service Editor, click **ArcGIS Online** and choose who the service should be shared with. By default, your service is private, meaning it is only accessible to you. Your service will always be visible in My Content, but you can also choose to share it with everyone in your organization or just members of certain ArcGIS Online groups.

13. In Service Editor, click **Analyze** ✓. This examines your map to see if it can be published as a service. You must fix the **Errors** ⊗ in the **Prepare** window before you can publish your map as a service.

14. In Service Editor, click **Preview** 🔍. This gives you an idea how your service will look when viewed on the web.

15. Once you've fixed the errors and (optionally) any warnings and messages, click **Publish** 📑.

Publishing a Hosted Feature Service from ArcGIS Online Using a Shapefile or CSV File

1. Sign in to ArcGIS Online. If you have a large file to publish, you should check **Keep me signed in**. This prevents ArcGIS Online from timing out before the service has been created.

2. Open **My Content** and click the **Add Item** button.

3. In the **Add Item** window, choose **On My Computer** from the **The item is** options.

4. Click the **Choose File** button and choose the file on your computer.
   Note: You can publish a CSV file or shapefile compressed as a .zip file containing .shp, .shx, .dbf, and .prj files. CSV files need to contain address information or latitude-longitude coordinates in decimal degrees. CSV files must be formatted and saved as .csv. Other text-based file types cannot be published.

5. Type in a title.

6. Type in tags. Alternatively, you can click the **Choose from your tags** link to open the list of tags you've used previously and choose the tags you want to use for this item.

7. Check the check box next to **Publish this file as a feature service**. If you leave the box unchecked, your data file is added to **My Content**, but no feature service is created. (You can publish a feature service later, if you want.)

8. Choose to locate the features using latitude-longitude or address.

9. Review the field types and location fields.

10. Click a **Field Name** cell to change the name.

11. Click a **Field Type** cell to choose a different type.

12. Click a **Location Field** cell to choose a different field.

13. Click **Add Item**.
    Your file is published as a service. One way to test the new service is to view it in the map viewer.
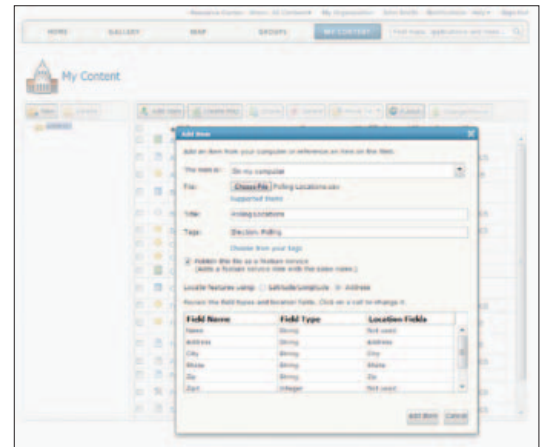
Joining the ArcGIS Online Organizational Account

When you receive the invitation from the ArcGIS Online administrator, your user name will appear in your e-mail invitation. Take note of the spelling—your user name and password are case sensitive. To join the organization, create a password, agree to the terms of use, and then follow these steps:

Joining with a Preestablished Login

1. Click the link in the e-mail to finish setting up your account.

2. Fill out the information, including a password and identity question.

3. Read the terms of use carefully and click the **I Accept** button to agree to the terms.

Joining by Creating Your Own Account

If you receive an e-mail invitation that does not include a user name, follow these steps:

1. Click the link you see to go to the **Sign in** page.

2. Click the **Create A New Account** button and fill in the necessary information.

3. Accept the terms of use and click the **Create My Account** button.

All Users
Creating a Map

Adding Data from ArcGIS Online to Your Map

1. From your organization's ArcGIS Online home page, click **Map** to open the map viewer. You will see your organization's default basemap.

2. To use a different basemap, click **Basemap** and select the map of your choice (Imagery, Streets, Topography, etc.).

3. To add data, click **Add** and choose **Search for Layers**.

4. Type a keyword in the **Find** text box (e.g., earthquakes).

5. Choose where you want to find the layer (e.g., My Organization, the web, or a GIS server) and then click **Go**.

6. From the results list, click the **Add** link next to each layer you want to add to your map.

7. Continue adding relevant data to create your own mashup.

You can make your own map using basemaps and data available in ArcGIS Online, and you can add your own data as well. Follow the steps to make a map using data from ArcGIS Online, add your data from a text file, symbolize the data, and then share your map with others.
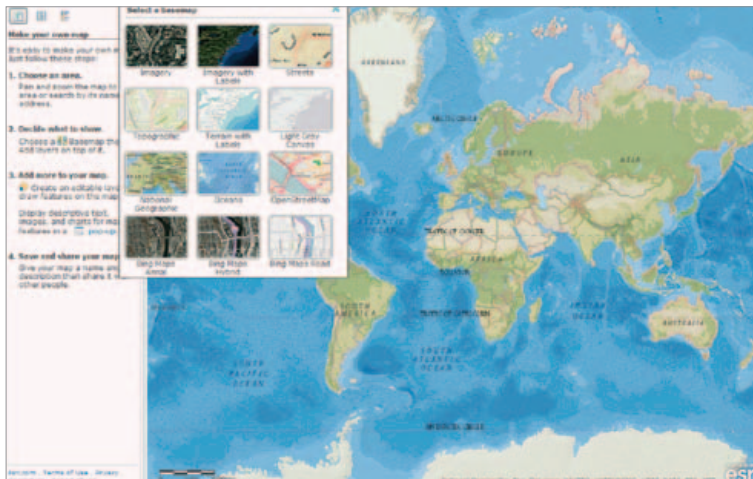
Creating a Map

Adding Your Data from a Text File to Your Map

You can add features to your map that are stored in a delimited text file (.txt or .csv), a GPS Exchange Format file (.gpx), or a shapefile that has been compressed into a .zip file. (Delimited text and GPS files must contain fewer than 1,000 features.)

1. Click **Add** and choose **Add Layer from File**.
2. Click **Choose File** and locate the file on your computer.
3. Click **Import Layer** to add your data to the map.
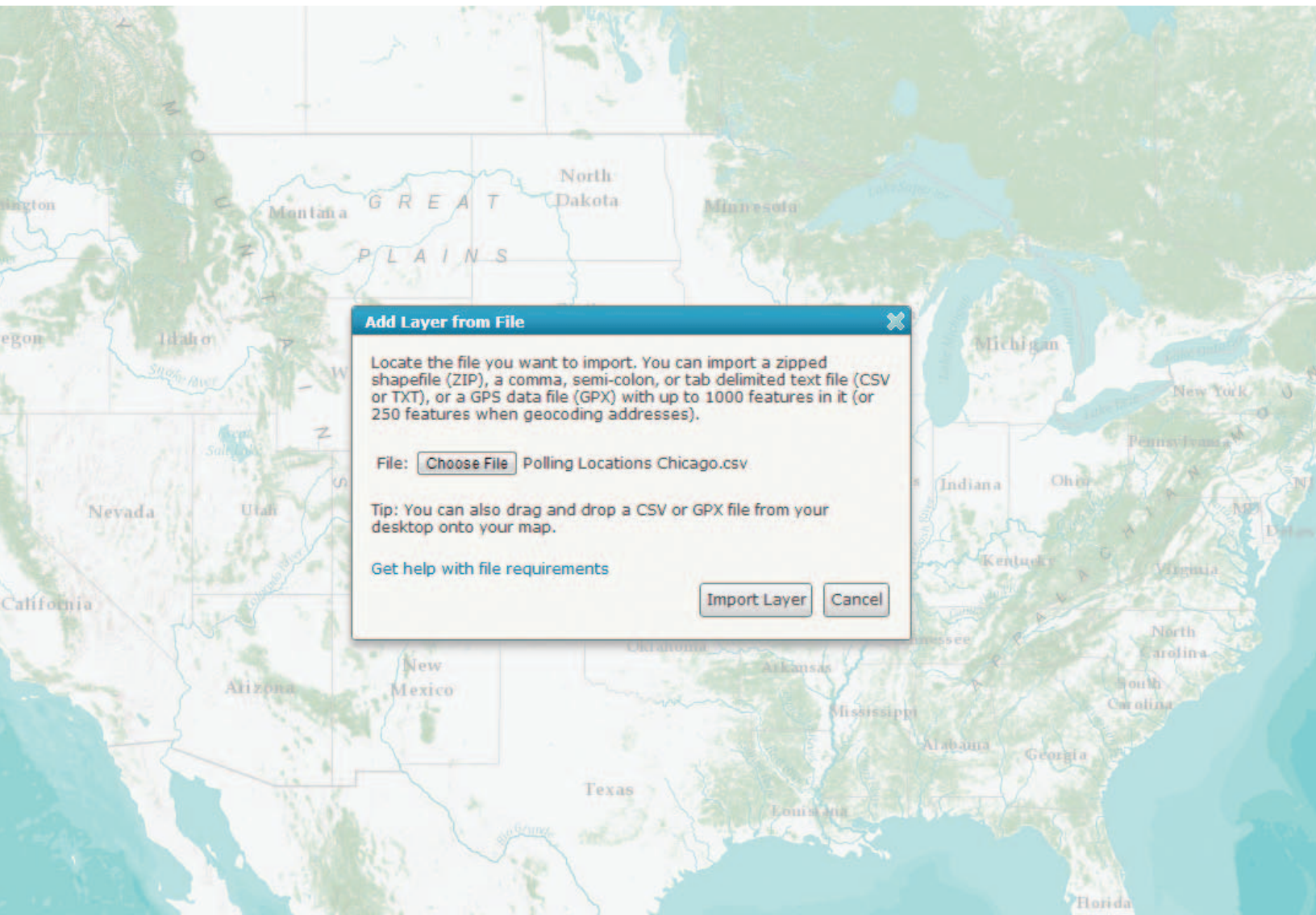
## Making a Map with Your Excel Data with Esri Maps for Office

1. Open the Excel workbook that contains your data and click the **Esri Maps** tab in the Excel ribbon.

2. Click the **Insert Map** button at the top left of the Excel ribbon and enter your ArcGIS Online subscription account **user name** and **password** in the sign-in window. A map window with a default basemap opens.
   Note: You can change the default basemap by clicking **Basemap** in the ribbon and clicking one of the other basemaps.

3. Click the **Add Excel Data** button or right-click on the map and select **Add Excel Data** from the menu.

4. Choose **Cell Range** to manually select the data you want to add to the map. (The **Table or Named Range** option is described in the Esri Maps for Office Help.)

5. Select the cells that contain your data. Include column headers in your selection—they will be useful in a later step. Click **OK**.

6. Select the **location type** that best represents your data—for example, **Address**—and click **Next**. The **Location Columns** window will show all the columns you selected. If you included column headers in step 5, they are displayed in the drop-down list, and the **First row contains headers** check box is automatically checked.

7. Click the **Add Data to Map** button to finish adding the data. A layer containing your data is added to the map.

8. The layer is listed on the **Map Contents** tab in the **Esri Maps** task pane in the right side of your Excel window. Right-click on the layer and select **Go To** from the menu to zoom to the layer's extent.

9. To add services hosted from ArcGIS Online, click the **Search** tab in the **Esri Maps** task pane and enter a keyword.

10. Choose the service you want to mash up with your mapped data and click the **Add** button next to the thumbnail in the list of your search results.
    Note: To share your map in ArcGIS Online and publish it as a feature service, you must have the publisher or administrator role.

Use the Esri Maps for Office add-in to make a map of your spreadsheet data without leaving the Excel environment. If you haven't downloaded the add-in yet, you can get it at **esri.com/mapsforofficedownload** in one of the supported languages. Please note that Esri Maps for Office requires Microsoft Office 2010 or higher.

Creating a Map
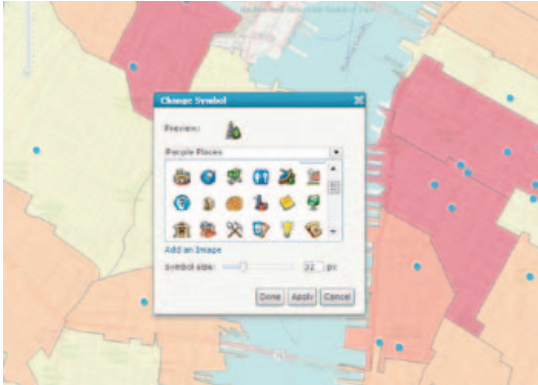
Symbolizing and Configuring Your Data

You can change how features are displayed on a map and expose the rich content that is stored in the attributes using pop-up windows.

1. Move your cursor to the right of the layer name and click the **arrow** that appears next to the layer you want to configure. If your layer does not have an arrow, click the layer to expand the contents. This will allow you to see each configurable layer.

2. Choose the parameters you wish to configure:

   • Modify the **transparency** of your data.

   • **Rename** your data in the Contents list.

   • **Configure** pop-up windows.

   • **Change symbols** to customize the look of your map.

Saving Your Map to My Content

Once you have created your map, you can save it to My Content so that only you can see it and use it later.

1. Make sure you are signed in to ArcGIS Online.

2. Click **Save** at the top of your map to save your map.

3. Enter a **title** for your map.

4. Enter **tags** or keywords for your map and data.

5. Enter a **summary** of the map you created.

6. Choose your profile in **Save in folder** to save your map under My Content.

Sharing Your Map with Others

Sharing a Direct Link or Embedding Your Map

1. **Open** the saved map you want to share in the map viewer.

2. Click the **Share** button at the top of your map.

3. To determine who has access to your map, check the boxes to share with **Everyone (public)**, your **organization**, and/or **Members of these groups**.

4. When you choose **Everyone (public)**, you can share maps in the following ways:

   • Share a direct link to your map by copying the URL shown in **Link to this map** into an e-mail.

   • Click **Embed in Website** to copy the HTML code to your website or blog.

Sharing Your Map through a Web Application

You can quickly create your own web application without any programming by configuring and publishing one of the templates in the map viewer.

1. Open a saved web map in the map viewer.

2. Click **Share**.

3. Click the **Make a Web Application** button.

4. Pause the mouse pointer on a template thumbnail to see a description of the template.

5. Click the **Publish** link underneath the template thumbnail and choose **Preview**, **Download**, or **Publish**. Downloading the template allows you to configure the application and deploy it on your own web server.

6. If you choose **Publish**, follow the instructions in the **Share** window.

7. Click **Save & Publish**.

There will be times when you want to share your map with others. You can do this by e-mailing your map's URL, embedding the map in a website or blog, or using one of the many web application templates in ArcGIS Online, as described below.

All Users
Collaborating with Others

Groups are a way to organize and share content relevant to a specific topic or common activity. You can search for groups whose content you want to use or that you want to join so you can contribute your own content. If you don't see a group related to something you are interested in, you can create your own and decide whether you want others to join. Once you've created a group, you should share your related maps and applications. This will encourage others to use your group items and, if you accept members, join it and contribute their own items.

Creating Groups

You can share any public group that you belong to or find in ArcGIS Online by posting it on a social network site, e-mailing the link, embedding it in a website, or creating a gallery application.

To create a group, follow these steps:

1. Verify that you are logged in.
2. Click **Groups** in the top navigation bar and then click the **Create a Group** button.
3. Enter a group name, summary, description, and tags and add a thumbnail image.
4. Select one of the following: **Private** (where users cannot find the group and only you, the owner, can invite others to join); **Organization** (where only members of your organization can search for and find the group); or **Public** (where users can search for and find the group). If you choose Organization or Public, check or uncheck **Users can apply to join group**.

Note: Your organization may restrict members from creating public groups or sharing items outside the organization. If this is the case, users and publishers won't see options to set the group status to Public. Administrators, however, can set the status to Public.

When you create a group, you can select a setting that allows only you, the owner, to contribute items to that group. Other members of your group can view the items and open them, but they cannot add their own items to the group.

Administrators have the ability to add members directly to a group without the member needing to accept an invitation.

Administrators can also create and configure groups that contain content for the ArcGIS Online home page, including the gallery, basemaps, web mapping application templates, and group gallery application templates.

Creating Applications with Groups

To create a gallery application with group items, follow these steps:

1. Open the group you want to use to create a gallery application. If the group is private, only group members who sign in to the website will be able to see items in the gallery. If you are the group owner and want to share the gallery with the widest audience, consider making the group and its items available to everybody (public).

2. Click **Share** to open the **Share** window.

3. Click the **Make a Gallery application** button. The **Make a Gallery application** window opens with a set of templates you can use to create your application. The configurable templates have a **Configurable** icon ✿ on the template thumbnail.

4. Click a template thumbnail to see how your map will look in the template.

5. Click the **Publish** link underneath the template thumbnail, and then click on **Download** if you want to download the template files (as a ZIP file) and deploy the application on your machine. Unzip the downloaded file and follow the instructions in the readme.html file.

6. Click the **Publish** link underneath the template thumbnail you want to use if you want to publish the application to the Esri cloud.

7. Type a title for your application.

8. Type tags. Alternatively, you can click the **Choose from your tags** link to open the list of tags you've used previously and choose the tags you want to use for this item.
   Note: Tags are words or short phrases that describe your item. Separate terms with commas. **Federal land** is considered one tag, while **Federal, land** is considered two tags.

9. Type a summary.

A gallery application displays web maps and web applications in a group. Any changes owners make to their items are reflected in the gallery. If a web map or web application that was public or shared with the group is made private (or deleted), the item no longer appears in the gallery.

Collaborating with Others (continued)

10. Select a folder from your **My Content** page where you want to save the item details.

11. Click the **Save & Publish** button. The **Share** window displays text saying you have successfully published your gallery application. Your application is added to ArcGIS Online as a web mapping application, and an item is added to **My Content**. By default, the application is unshared, which means only you can see it. To make it accessible to others, you need to share it with your organization, groups you belong to, or everybody (if your organization allows sharing outside the organization).

12. If you selected a configurable template, click the **go to the item now** link on the **Share** window. This opens the item details for the application.

13. Click the **Configure App** button. The template opens where you can change components of the gallery application, such as the layout, title, options for the web maps and applications, and various other miscellaneous items. Click **Save** when you are done configuring the application.
   Note: Your organization may restrict members from sharing items outside the organization. If this is the case, users and publishers won't see options to share content or groups with everybody (public). Administrators, however, can choose to share any item in the organization publicly.
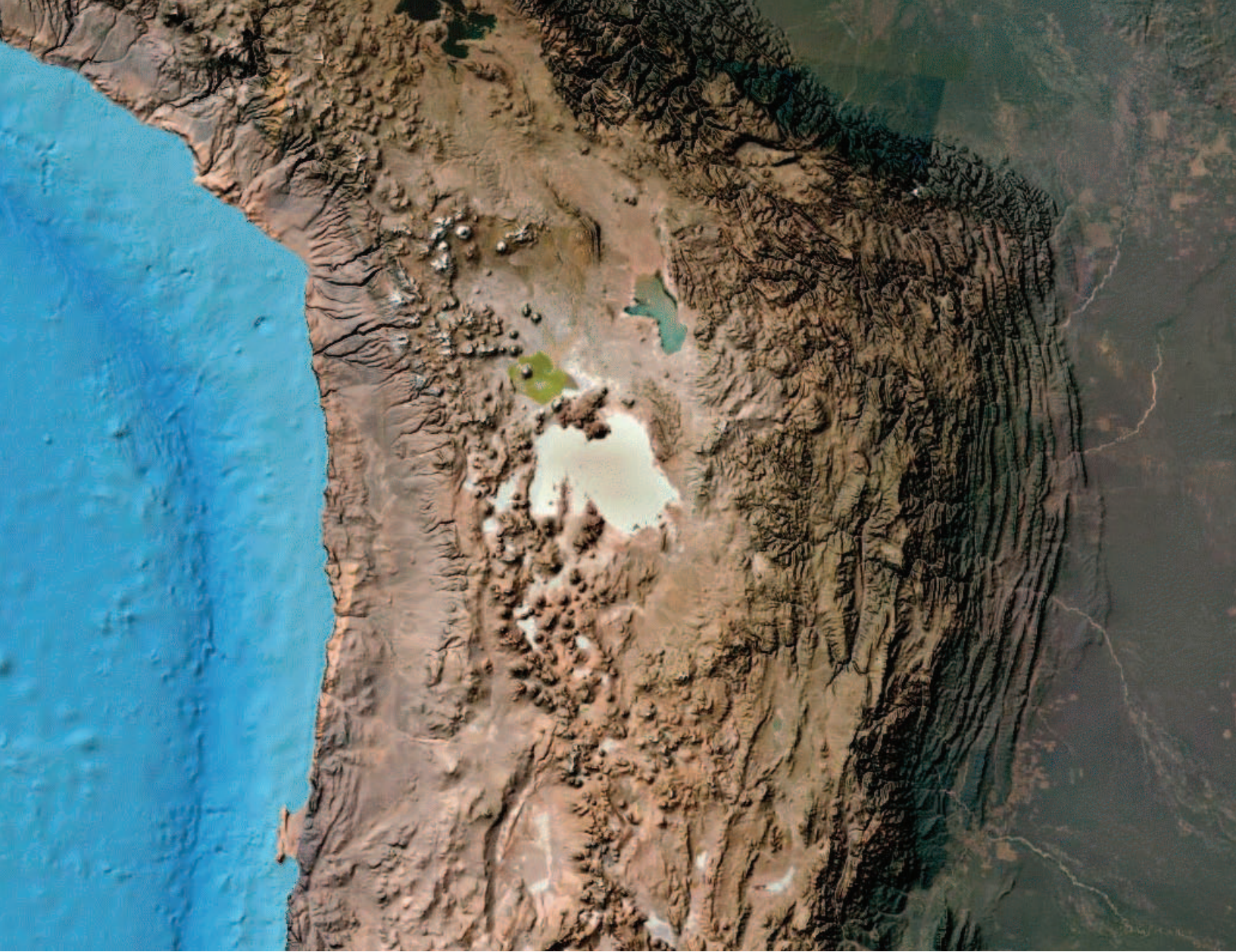
For more details and to access tutorial videos,
visit **esri.com/agolhelp**.

esri®

Understanding our world.

Esri inspires and enables people to positively impact their future through a deeper, geographic understanding of the changing world around them.

Governments, industry leaders, academics, and nongovernmental organizations trust us to connect them with the analytic knowledge they need to make the critical decisions that shape the planet. For more than 40 years, Esri has cultivated collaborative relationships with partners who share our commitment to solving earth's most pressing challenges with geographic expertise and rational resolve. Today, we believe that geography is at the heart of a more resilient and sustainable future. Creating responsible products and solutions drives our passion for improving quality of life everywhere.