

ESRI EXTERNAL

How to Administer Users on My Esri

Congratulations!

You have been designated as an administrator for your organization on My Esri. This means that you have been granted full administrative permissions on My Esri, which gives you the tools you need to manage your organization's relationship with Esri, and your colleagues' relationship. The following are some instructions and guidelines to help you be a successful My Esri administrator.

What is My Esri?

My Esri is a website where you can view and manage Esri information regarding your organization.

My Esri can be used for:

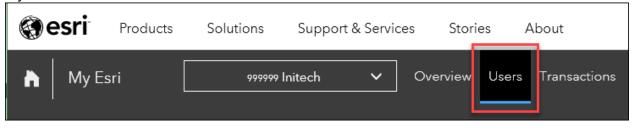
- Downloading and licensing Esri software
- Managing Technical Support cases
- Viewing Esri software bugs
- Viewing your organization's order history and maintenance quotes
- Renewing your store purchases
- And much more

What do we mean by "organization"? An organization on My Esri is equivalent to your place of business, school, governmental organization, or other entity. Each organization on My Esri has one customer number. The term "organization" is used slightly differently on My Esri than it is on ArcGIS Online, where "organization" relates to a subscription.

What is an Admin?

Administrators in My Esri ("admins" for short) are those users who have been granted **Administrator** permission. This permission gives you the ability to grant permissions to yourself, and to others in your organization.

Tools for managing permissions are found on the **Users** item on the Home menu. The Users item is only available to admins, and contains all the tools necessary to administer users on My Esri.



What are Permissions?

Permissions are the "glue" between your organization and an ArcGIS public account username. Permissions are used to connect your username to your customer number. Each permission grants certain access to your organization's information to that username. When you sign in to My Esri, it's the permissions that you have been granted that determine what you can and cannot see and do.

As an admin, when you connect users to your organization, you do that by granting them at least one permission.

Permission availability varies by organization. Some are controlled by what contracts you have in place with Esri. If you are outside the US, some are controlled by your distributor.

Responsibilities

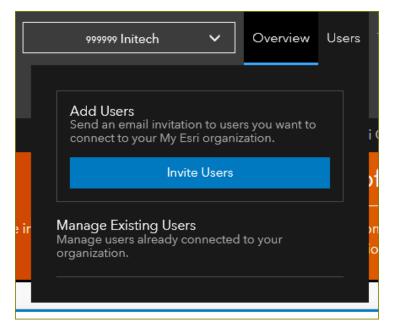
As an admin, your main responsibilities on My Esri are:

- Managing Users: Taking care of permissions of others in your organization: <u>Add (Invite)</u>, <u>Edit</u>, <u>Disconnect</u>
- <u>Managing Authorized Callers</u>: Designating authorized callers who can submit Technical Support cases

Each responsibility is described in detail below.

Adding Users

Add users to your organization by sending them an invitation by email. The **Invite Users** tool walks you through the process of inviting users to your organization. Find the tool on the Home menu at the top of the Users mega menu.



First, provide the email addresses, either one-by-one, or from an .xlsx or .csv file. You can invite up to 1,000 users at a time.

Invite Use	ers	
	ers	
ation to those users you want t		
alon to those users you want i	to connect your My Esri organization.	
	Upload a CSV or XLSX file of email ad	ddresses
× Add Email	Upload Users	Drop file here
	Allowed file types: .xlsx, .csv	
	need for a header row for columns. We reco	ommend having only one (1) column ir
Active User	Pending User	Actions
	X Add Email	

Any email address that fails to pass basic email formatting validation are not added to the invitation list. Remove any address from the list by clicking the red trash can in the Actions column. Click Remove All Emails to clear the list, and click Cancel at the bottom of the page to start over.

Remove All Emails				
Email	Active User	Pending User	Actions	
tdolan@esri.com		0	Ī	•
msutton@esri.com	•		Ī	
jbeaton@esri.com			Ī	Ţ

My Esri lets you know if a user is already connected or not by placing a checkmark in the Active User column. If you leave the already-connected users on the invitation list, the choices you make here may alter their existing permissions, and the users will receive a new invitation with a token that they'll need to accept for the changes to apply.

Once you are satisfied with the email addresses on the invitation list, scroll down the page to select the permissions to grant.

If you are unclear what functionality the permission allows the user to have access to, hover your mouse over the blue information circles; this will show a tooltip describing each permission.

Allows user to download Esri software	purchased by the organization.
Download software 👔	View training information () Assign training permissions () Access e-Learning ()

In addition to the permissions, you can optionally add a tag, to help you organize the users.

You can also optionally designate a time limit for the permissions to be valid for. To easily navigate far in the future, click the "Month Year" text to see more date choices.

Permissions to Grant Time Limit							٦	ags		
Set Time Limit 👔								Ma	pping Division 😣	×
Start Date	End Date									
9/1/2022	9/7/2022				f					
Permissions Grant All Clear All Grant Vie	May Jun Jul	Sep		ber 2 мо ті	-	TH FF	R SA	īoday 3		
Admin	Aug	4	5	6	7	8	9	10	tions	Cost
Administrator ()	Sep Oct	11					16		View transaction	View cost information ()
	Nov	18 25	19 26				23 30		tion () Perform transaction	
	Dec 2023								0	

Users connected with a time limit can only access your organization with My Esri within the time range; if they try to access your organization outside the time range, it will appear as if they are not connected (that is, they will not have access to your organization).

Once the time limit expires, you will have a 30-day window to either modify the date range or remove it. After the 30-day mark, users with expired permissions are automatically removed from your organization.

Will this user be an authorized caller?

If your organization has support services as part of its maintenance contract, users at your organization will be able to use My Esri to request Support cases. The users designated to request cases are called **authorized callers**. Authorized callers are assigned in My Esri. To make assignment easy, you can assign them when you invite them. (Read more about authorized callers.)

To add an authorized caller from Invite Users, only one user can be invited at a time. Turn on both **View technical support information** and **Take authorized caller actions**. When you turn on the latter, a new part of the form will appear. The options on the form will vary based on your location and your contract, and may not match what is shown below. Complete this part of the form for your caller. All fields are required.

Support			
View technical	supp	ort information	0
Take authoriz	ed o	aller actions 🚹	
First Name		Last Name	
Milton	×	Waddams	×
Call-in ID			
Enter Call-in ID			
Caller Level			
 Premium (4 avail After Hours 	able)	
Application Sup			
🗹 Standard (1 avail	able)	
Assign authoriz	ed c	allers 🕕	

After turning on the appropriate permissions, continue down the page, where you may add a personal message to your invitees, specify what language to send the invitation email in, and add a note which will appear in the Permissions Log.

Send invitation in					
English - English					•
Add message to your i	nvitation (Optional)				
 ♠ ♦ B 	J Paragraph	▼ I= 1=			
Hello, Milton,					
Welcome to Initech.	0				
New employee.	•				
nen empleyee.					
	e connected to you ad edit data about yo		are authorizing them	n, depending on the p	ermissions
				Cancel Ser	nd Invitation

Once you are satisfied with all the parameters, send the invitations.

Users with an invitation are shown as Pending on Manage Users until they accept the token, at which point their status changes to Active.

Each invitation email will include a unique token, which My Esri uses to identify your invitee. These tokens must be accepted within 6 weeks of issuance; unused tokens and their invitations that are older than 6 weeks are automatically deleted.

Manage Users: Edit

Once users have accepted their tokens and are connected to your organization, you can edit their permissions from Home / Users / Manage Existing Users / Manage Users. Click **Edit Permissions** (the pencil icon) or click the plus sign by their name to begin.

-	Teresa	Dolan	teresa@esri.com			tdolan@esri.com		Active	9/7/2022	9/6/2022 7:43 PM	Caller	Happy Camper	i / 🗊	
	Edit Perr Time Limit	t					Tags	py Camper 6	9				×	
	Permission Grant All	ns Clear All	Grant View Only	Reset										
	Admin Administrator 0				ization Update org	ganization details 🌒		Trensactions View transaction information ① Perform transaction tasks ①				Cost View cost information ()		
	Purchase	rchase on Esri stor	re ()		View licens	ing information () insing actions () licensing tags ()		Term Sumn			Downloads Download software ()			
	A33	w training informa sign training perm cess e-Learning (hissions 🕕		View techn Take aut all-in ID	ical support information ① horized caller actions ① horized callers ①	Events	View event ir Perform e	formation () vent tasks ()					
) No ser (Optional) B I U Fo	rmat '	• III II (4)										
	Note for log ('Optional) 🚺										Cancel	// odate Permissions	

You'll see the same form you saw on Invite Users, where you can add and remove tags, add or remove time limits, and add or remove specific permissions for each connected user. If your organization has a valid technical support contract, you can use this form to make the user an authorized caller. You can edit permissions on pending invitations, too. When the user accepts their token, they'll receive the updated permissions.

Unlike Invite Users, you can decide if the user will get an email or not about their updated permissions. Note that if you only update the user's tags, no email will be sent to the user, regardless of the email setting.

When you click Update Permissions to save the new settings, the user will get an email letting them know their permissions have changed (if you said you wanted the user to get an email). All admins connected to your organization (including yourself) will receive an email about the changed permissions.

Note that on Edit Permissions you do not specify the language that the user will receive the email in. This is because any emails the user receives now will be controlled by the language setting on their own profile.

Once your changes have been completed, you'll see a confirmation message near the top of the user list. Dismiss it at any time by clicking the X.

 Permission details for user te 	eresa@esri.com have been updated successfully.	×

Manage Users: Resend Invitation

Sometimes a user deletes their invitation before accepting its token. Resend the invitation email using **Resend Invitation**, found on Home / Users / Manage Existing Users / Manage Users. You'll see some familiar tools here.

Д	Resend Invitation ×		: / i
Д	Are you sure you want to resend the invitation to jbeaton@esri.com?		. / 1
Д	Send invitation in	lappy Camper	: / i
Д	English - English 🔹	lappy Camper	1
д	Hey Josh - Sorry you missed the invitation last time. Here is your	lappy Camper	1
Д	invitation email to My Esri.		
P	Note for log (Optional) 🕕		5
P	1.		R 🖍 💼
P	Cancel Send Invitation		
sp	per page		1 - 20 of 20 items

Manage Users: Disconnect

If a user leaves your organization, disconnect them from your organization using the red trash can on Home / Users / Manage Existing Users / Manage Users.

Disconnect User ×		
		1
Are you sure you want to disconnect Teresa Dolan (teresa@esri.com) from your organization?		. / 1
Has the user left your organization? 🚺		: / 1
○ Yes ○ No Send email to user?		.
● Yes ─ No	lappy Camper	. / 1
Message to user Image: Message to user </td <td>lappy Camper</td> <td>.</td>	lappy Camper	.
	lappy Camper	. / 1
Note for log (Optional) 1		1
		FQ 🖍 💼
Cancel Disconnect		

This simply removes all their permissions to your organization so that they will no longer have access to your organization's information on My Esri.

Disconnect does NOT remove their ArcGIS public or social media account, or their profile, from the system. The user may still be connected to other organizations with this account, such as their own Personal Use organization, and they can still use it to access other Esri-related sites.

If the user was an authorized caller, Disconnect will release the entitlements (caller levels) that were assigned to the user.

If the user no longer works for your organization, indicate that here. The Separated column found on the Permissions Log records this setting.

nage Existing Users	Manage Users Manage Au	thorized Callers Manage Tags	Bulk Update	Permissions Grid	Permissions Log	
		Permissions Log				
	See the history	og of who has been granted or o	denied permissi			
					~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	
Quick Search	Show All	Logs				☑ Export to Excel
Quick Search Action	Show All	Logs Affecting	▼ Se	parated	Note	 Export to Excel Date
			▼ Se		Note	

Manage Authorized Callers

An authorized caller is a designated individual from your organization who may contact Esri to request technical support, as designated by your organization's support contract. Add, edit, and remove authorized callers from the Home / Users sub tab.

Navigate to Home / Users / Manage Existing Users and click Manage Authorized Callers.

	999999 Initech	~	Overview	Users	Transactions	Licensin	g Downloads	Support	Training	Events	?	ŝ
anage Existing Users	Manage Users	Manag	ge Authorizec	Callers	Manage Tags	Bulk Up	odate Permissi	ons Grid	Permission	s Log		
		N	Manage	Auth	orized C	allers						
	Invite and	d manaç	ge users who	are autho	orized to submi	t technica	l support cases.					
								27777				2
0	of 5				Ē							
	ard Callers			_earn mo	∟⊛ ore about Premi	um Suppo	ort 🖻					
(
Quick Search											+ Add Ca	ller
Name T	Email	T	User's Profile Er	nail 🍸	My Esri Usernan	ne 🍸	Tags	Call-in I	D	Action	s	
					No records availa	ble.						÷
ia a ⊳ ⊨ 15	 items per page 	ge									0 - 0 of 0 ite	ems

From here, click Add Caller. The options you see on the form are tied to your support maintenance contract, your organization's country, and other factors, so what you see may differ from the screenshots below.

Add Caller	×
Authorized callers create and manage support cases for your organization, which includes the ability to transmit data to Esri.	
Who do you want to make an authorized caller? A user already connected to my organization A new user Select Contact 1	
Select Contact	•
Call-in ID	
Enter Call-in ID	
Cancel Add Call	er

Click on Select Contact to choose a contact that is already associated with your organization.. The list contains names of users connected to My Esri and users who are in our system who have used the phone to contact Esri Support Services. If we have a username for either type of contact, it will appear in brackets after the name.

Supply a Call-in ID. Should your caller ever want to use the phone to contact Esri Support Services, this is a key that they will dial in when they call. It can be any series of numbers and must be between 4 and 8 numbers, inclusive. It must be unique. This field is shown for organizations in the US.

Supply a Language. Select the user's preferred language for dialog with the Support contact. This field is shown is for organizations outside the US.

Select the Caller Level. The options listed here depend on your organization's active support contract. Check all that apply. If no Caller Levels are listed, your organization only has one level and so no checklist is needed.

When you're ready, click the Add Caller button. You'll see a confirmation message, and your new caller will receive an email from My Esri letting them know their new privileges.

If the caller you want to add isn't listed, choose **A new user**. You'll be prompted to provide the caller's contact info. Once you submit the form, the caller-to-be will receive an email from My Esri at the email address you provided. The invitation email will contain a token which will allow the new caller to be connected to your organization in My Esri as an authorized caller.

Add Caller			×			
Authorized callers create and manage support cases for your organization, which includes the ability to transmit data to Esri.						
Who do you want to make an authorized ca A user already connected to my orga A new user						
Email mwaddams@initech.com						
mwaddams@initecn.com			×			
First Name		Last Name				
Milton	×	Waddams	×			
Phone Number	Phone Extension (Optional)					
714 555 1234	×					
Language						
English - English			•			
Caller Level Premium (1 available) Caller Level Premium (1 available) Caller Level Premium (1 available)						
		Cancel Add Call	er			

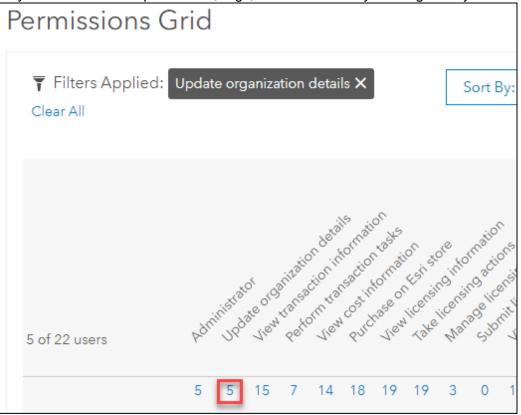
More Information

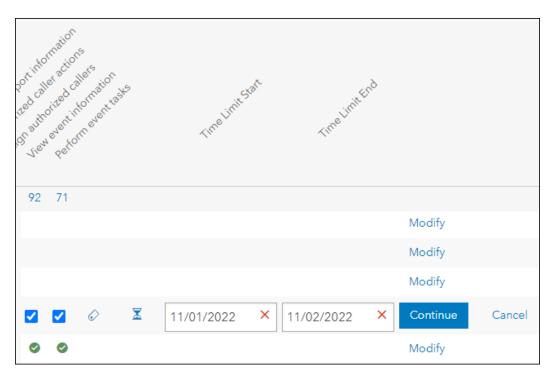
Responsibility. By inviting users to be connected to your organization, you are authorizing them, depending on the permissions you grant, to view and edit data about your organization. When you grant a user access to your organization, you are authorizing Esri to use internally for its business purposes and share information regarding their name and profile with administrators within your organization. In addition, you are also authorizing your data, including company name and email address, to be stored by Esri and shared internally within Esri and with Esri International Distributors.

Who has what permission? There are several ways to see who has what permissions in My Esri.

• Home / Users / Manage Existing Users / Manage Users. Toggle a view of a user's permissions by clicking the plus sign to the left of their name.

Home / Users / Manage Existing Users / Permissions Grid. See a spreadsheet-like display
of users and permissions. Filter on any permission by clicking the number just below the
permission heading. Additional tools are provided for sorting, filtering, and exporting. You
may also edit a user's permission, tags, and time limits by clicking Modify.





 Home / Users / Manage Existing Users / Manage Users. Use Export to Excel to generate a spreadsheet of your users and their permissions. If you used any filters to narrow your list, only the filtered records are exported.

When were the permissions assigned? Use Home / Users / Manage Existing Users / Permissions Log to see who did what when. Expand an entry to get details about which permissions were edited.

lanag	ge Existing Users	Manage Users Ma	nage Authorized Ca	llers Mar	nage Tags	Bulk Update	Permissions Grid	Permissions I	Log	
	Permissions Log									
		See the history	log of who has beer	n granted	or denied pe	ermissions.				
									-0-	
Qu	uick Search		Collapse All Details					🖈 Expo	rt to Excel	
	Action Y	Ву	▼ Affecting	T	Separated	Y Note		T	Date	
	Pending request removed	My Esri Service	mwaddams_1			Pending to no res	request deleted after 6 ponse.	weeks due	9/1/2022 3:47 PM	
	User deleted	bossman@initech.co	m nomoore@inite	ch.com	Ø				5/31/202 9:27 AM	
-	Permissions edited	bossman@initech.co	m InitechTester						2/24/202 7:01 AM	
Permissions Modified										
	What Was Change	d	T	▼ Old Setting		٦	▼ New Setting		T	
	View training infor	mation		No			Yes			
	Invitation sent My Esri Service mbolton@inite			ech.com Primary M		y Maintenance Contact has been admin		2/24/202 7:00 AM		

What are the other admin permissions? These permissions grant the user limited admin ability, so that you don't have to grant them full admin permissions.

- Assign training permissions allows the user to invite and manage users who have the Access e-Learning permission. They can see all the users connected to the organization, but they can only add (invite), edit, and disconnect those with the e-Learning permission.
- Assign Authorized Callers allows the user to manage authorized callers using the same tools as full admins. However, these admins cannot see any other users connected to the organization; they can only see who is on the authorized caller list. These admins only have access to the tools on Home / Users / Manage Existing Users / Manage Authorized Callers.
- **Take licensing actions** allows the user to approve or deny license files requests submitted by users in their organization. These admins can also grant the **Download**

Software permission as needed. These tools are accessed from Home / Licensing / License File Requests.

Need more help? Guided help is available in My Esri. One way to access it is through **Common Questions**, found on the Help menu. If you don't find the help you are looking for, use **Ask Customer Service**, also found on the Help menu, to let us know what we could add that would help you. We also welcome your **feedback** – use the link in the Help menu to give us suggestions on how we can improve My Esri.

Licensing Support Training Events										
Ask Customer Service Can't find what you're looking for? Can't do something you need to do? Contact Customer Service for assistance.										
Common Questions View the frequently-asked questions and their answers.										
Contact My Administrator Use this tool to send an email to the My Esri administrator in your organization.										
Remove My Account Do you no longer need your public account? Do you have multiple accounts you want to get rid of? Use this form to make your request.										
Feedback I Do you like the new experience? Do you have suggestions on how to improve it? Let us know!										
Licensing Downloads Licensing Support										
Common Questions										
? Common Questions ? Guided Help										
Type in your question.	٩									
Profile & Settings Tour										



Esri, the global market leader in geographic information system (GIS) software, offers the most powerful mapping and spatial analytics technology available.

Since 1969, Esri has helped customers unlock the full potential of data to improve operational and business results. Today, Esri software is deployed in more than 350,000 organizations including the world's largest cities, most national governments, 75 percent of Fortune 500 companies, and more than 7,000 colleges and universities. Esri engineers the most advanced solutions for digital transformation, the Internet of Things (IoT), and location analytics to inform the most authoritative maps in the world.

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