

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 is used for:

- Downloading and licensing Esri software
- Submitting Technical Support cases
- Viewing Esri software bugs
- Viewing your organization's order history and maintenance quotes
- 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 are those users who have been granted **Assign permissions**. This permission gives you the ability to grant permissions to yourself, and to others in your organization. Managing permissions is accomplished on the Users sub tab under the My Organizations tab. This sub tab is only viewable by admins and contains all the tools necessary to administer users on My Esri.

Responsibilities

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

- **Managing Users:** Taking care of permissions of others in your organization: [Add \(Invite\)](#), [Edit](#), [Disconnect](#)
- **Managing Requests:** Managing access requests of those who want to be connected to your organization (grant or deny access)
- **Managing Authorized Callers:** Designating authorized callers who can submit Technical Support cases

Details about each are offered below.

Adding Users

You add users to your organization by sending them an invitation by email.




The wizard My Organizations / Users / Invite Users walks you through the process of inviting users to your organization.


The screenshot shows the 'Invite Users' wizard in the My Esri interface. The breadcrumb trail is 'My Esri / My Organizations / Users'. The main heading is 'Invite Users'. The current step is 'Step 1: Provide Email Addresses to Invite'. There are two options for providing email addresses: entering them manually in a text box labeled 'Enter email addresses', or uploading a file. A button labeled 'Upload Users' with a paperclip icon is provided for the upload option. Below the upload button, a note states: 'XLS file format is not supported. Contents of every cell will be read, so there is no need for a header row for columns. We recommend having only one (1) column in your file, containing one email address per row.' A 'Next >' button is at the bottom right. On the left sidebar, the 'Invite Users' option is highlighted. At the bottom left of the sidebar, there is an 'Ask a Question' button. The top navigation bar includes 'Dashboard', 'My Profile', 'My Organizations', and 'EEAP'. The main navigation bar includes 'Organization List', 'Overview', 'Users', 'Licensing', 'Developer', 'Training', 'Support', 'Events', and 'Reports'.


On the first step, you provide the email addresses. You may provide them one-by-one, or you may upload a file with a list of email addresses. You can invite 1,000 users at a time.

If any of the email addresses don't pass basic validation, you must remove them before you can move on to Step 2. You can remove them one-by-one by clicking the X in the Action column or click the "Remove invalid email addresses" button to remove them all at once.

3	1	1	0
Total added	Invalid email address format	Matched active user(s)	Matched pending user(s)

Email Address	Action
 tdolanesri.com Invalid email address format	<input type="button" value="X"/>
 MyEsriTestUS1@gmail.com	<input type="button" value="X"/>
 tdolan@esri.com Matched an active user	<input type="button" value="X"/>

 One or more of the email addresses entered matches an active user already connected to your organization. If kept in the list, a new invitation will be sent and any additional permissions will be granted when the invitation is accepted.

 Please remove the invalid email addresses above.

My Esri indicates if a user is connected already or not. If you leave these users here, the changes you make on subsequent steps will alter their existing permissions, and they will receive a new invitation.

Once all the email addresses you provided pass validation, you can proceed to Step 2. There, you will select the permissions to grant. You can also designate a time limit for the permissions to be valid for. If you aren't clear what a permission is for, you can read its Description.

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 org).

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.

After selecting the appropriate permissions, continue to Step 3, where you can add tags which will appear on Manage Users, 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.

To see what it will look like to your invitees, use the Preview tool.

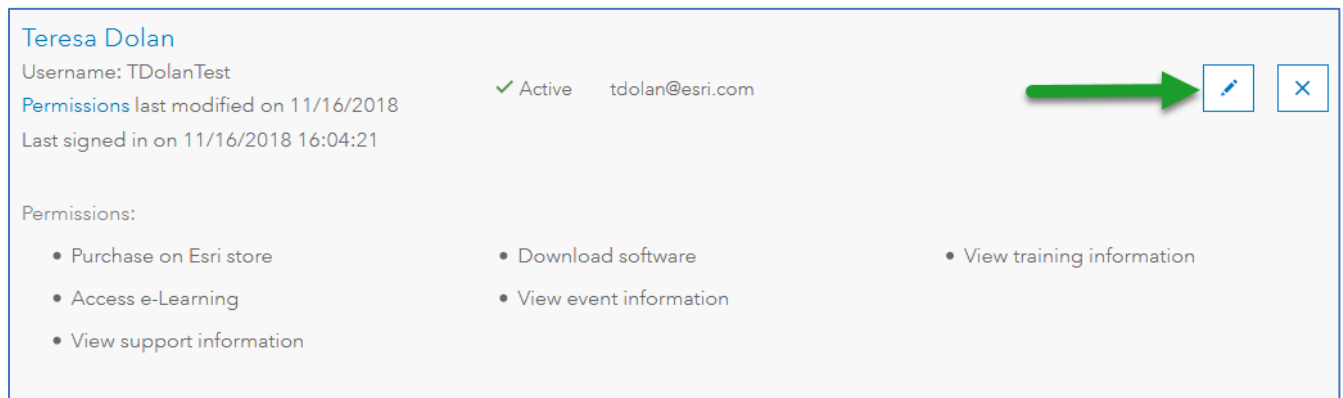
You can go back at any time to make changes if you missed anything.

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

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 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 My Organizations / Users / Manage Users. Click Edit Permissions (the pencil icon) to begin.



The screenshot displays the user profile for Teresa Dolan. Key information includes: Username: TDolanTest, Permissions last modified on 11/16/2018, Last signed in on 11/16/2018 16:04:21, and a status of 'Active' with email address tdolan@esri.com. A list of permissions is shown, including 'Purchase on Esri store', 'Access e-Learning', 'View support information', 'Download software', 'View event information', and 'View training information'. A green arrow points to the 'Edit Permissions' button (pencil icon) in the top right corner.

You'll see a page like Step 2 of Invite Users, where you can add and remove tags, add or remove time limits, and add or remove specific permissions for each connected user. You can edit permissions on invitations, too.

Just as on Invite Users, you can Preview the email before sending it, but unlike Invite Users you can control if the user will get an email or not.

When you click Update Permissions, 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 the admins

(including yourself) will receive an email letting them know that this user's permissions have changed.

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.

Manage Users: Disconnect

If a user leaves your organization, you can disconnect them from your organization using the X button on My Organizations / Users / Manage Users.

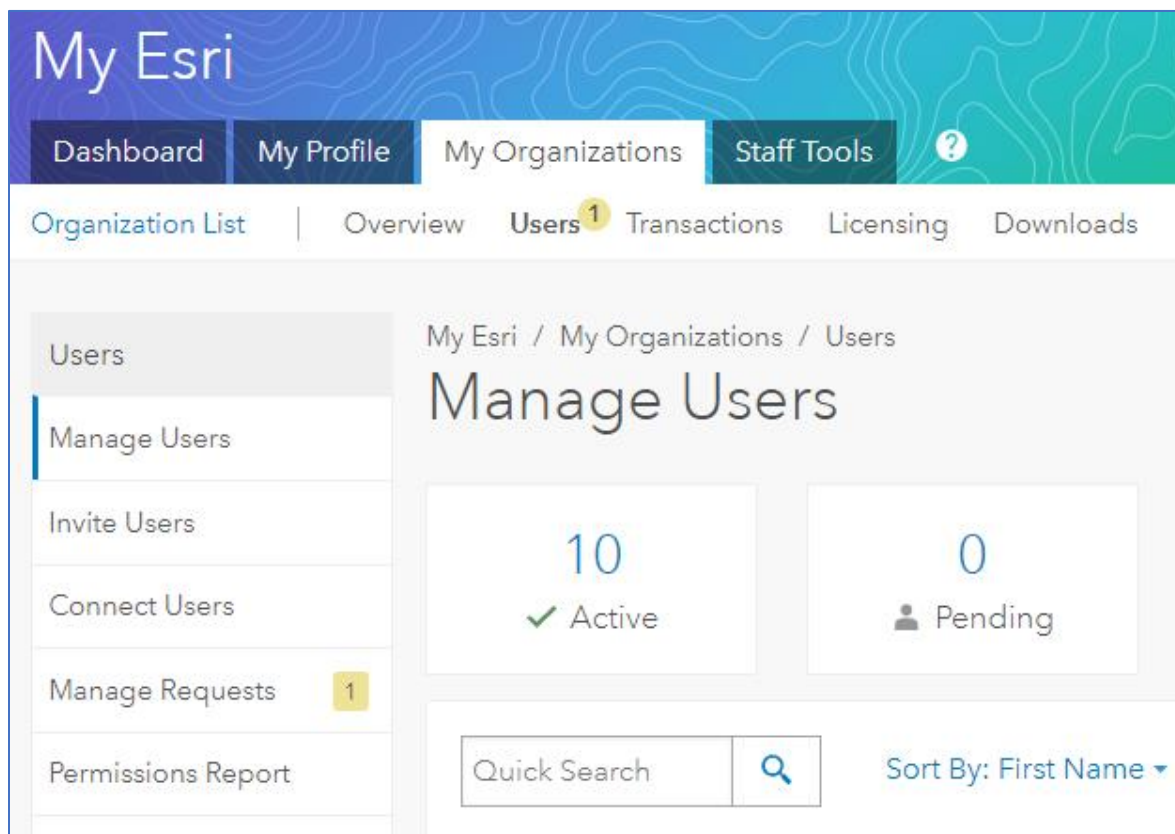
This simply removes all their permissions to your organization so that they will no longer have access to your organization's information on My Esri.

This does NOT remove their Esri 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.

Manage Requests

When users request access to an organization that you administer, My Esri sends you an email letting you know about the request. This way, you don't need to sign into My Esri every day to check on status; you can wait until you receive an access request email.

If you've received one of these emails, when you sign in to My Esri, you will see a yellow badge next to the Users sub tab. This indicates the number of access requests awaiting you.



From My Organizations / Users, go to Manage Requests.

This page lists all the requests that users have made to join your organization. These come from users who have filled out the Request Permissions form and specified that they wanted to be connected to your organization.

Click **View** to toggle what permissions the user has requested.

The screenshot shows the 'Manage Requests' page in the Esri user interface. The page has a breadcrumb trail 'My Esri / My Organizations / Users' and a title 'Manage Requests' with a 'More Information' link. Below the title is a search bar and a 'Sort By: Recently Requested' dropdown. The main content is a table with columns 'Requester', 'Description', and 'Actions'. The first row shows a request from 'Mary Wolfstonecraft' with the following details: Username: maryShelley, Email: mshelley@theCastle.net, On 9/30/2018, Last updated on 9/30/2018 (1 day ago). The 'Description' column contains a yellow 'Already Connected' label and a 'View' link. The 'Actions' column contains 'Grant' and 'Deny' buttons. A green arrow points to the 'View' link.

You can click the name or username to see the user's contact card.

You'll see a label letting you know if a user is already connected. This may affect how you handle the request. If you **Deny** this access request, the user will still be connected; they just won't have any of the additional permissions they were requesting. If you **Grant** permissions, it will change the permissions they currently have to whatever you grant at this time. They user will receive an email after either of these actions, if you indicate you want them to receive an email. And any other admin for your organization will receive an email about these actions.

Manage Authorized Callers

An authorized caller is a designated individual from your organization who may contact Esri to request technical support. You can add, edit, and remove authorized callers from the My Organizations / Users sub tab.

Navigate to My Organizations / Users and click Manage Authorized Callers.

From here, click Add Caller.

Add Caller ✕

Add an existing contact from your organization or invite a new contact by entering an email address. The user's username, if found, will appear in the list in brackets after the email address.

Authorized callers create and manage support cases for your organization, which includes the ability to transmit data to Esri.

Add Caller

Teresa Dolan tdolan@esri.com [teresa@esri.com] ✕

Call-in ID *

00000000

Caller Level *

Premium (No limit for premium callers)

Standard (28 standard callers available)

Cancel Add Caller

In the Add Caller field, type in the caller's name. The predictive search feature will offer the 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 an Esri Account 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.

Select the Caller Level. The options listed here depend on your organization's active support contract, so you may see different choices here than what is shown in the screenshot. Check all that apply.

If you are at an organization outside the US, you may also have an option to provide the language your user prefers to be contacted in.

When you're ready, click Add Caller. 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, simply enter their email address in the Add Caller field. You'll be prompted to provide the caller's contact info. Just as before, 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 have a token which will allow the new caller to be connected to your organization in My Esri as an authorized caller.

Add Caller ✕

Add an existing contact from your organization or invite a new contact by entering an email address. The user's username, if found, will appear in the list in brackets after the email address.

Authorized callers create and manage support cases for your organization, which includes the ability to transmit data to Esri.

Add Caller

First Name *

Last Name *

Phone *

Phone Extension

Call-in ID *

Caller Level *

Premium (No limit for premium callers)

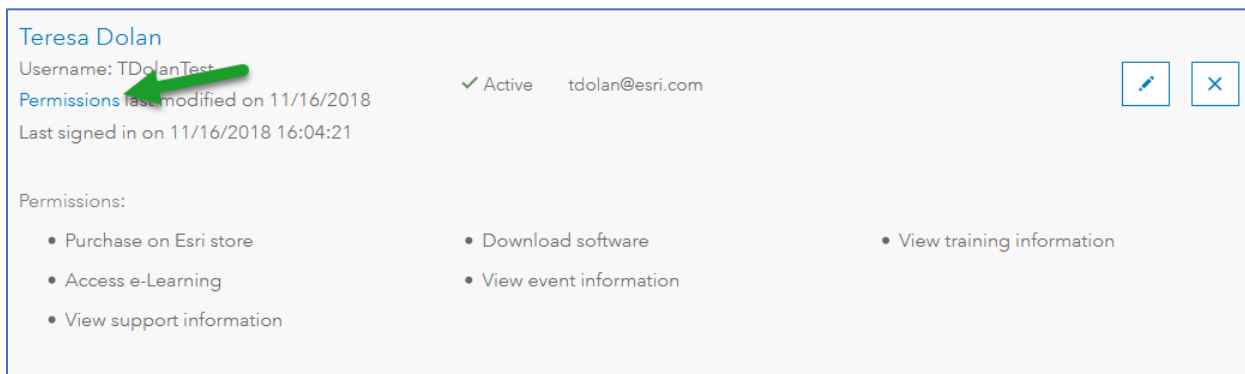
Standard (27 standard callers available)

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 three easy ways to see who has what permissions in My Esri.

- My Organizations / Users. Toggle a view of a user's permissions by clicking the Permissions link.

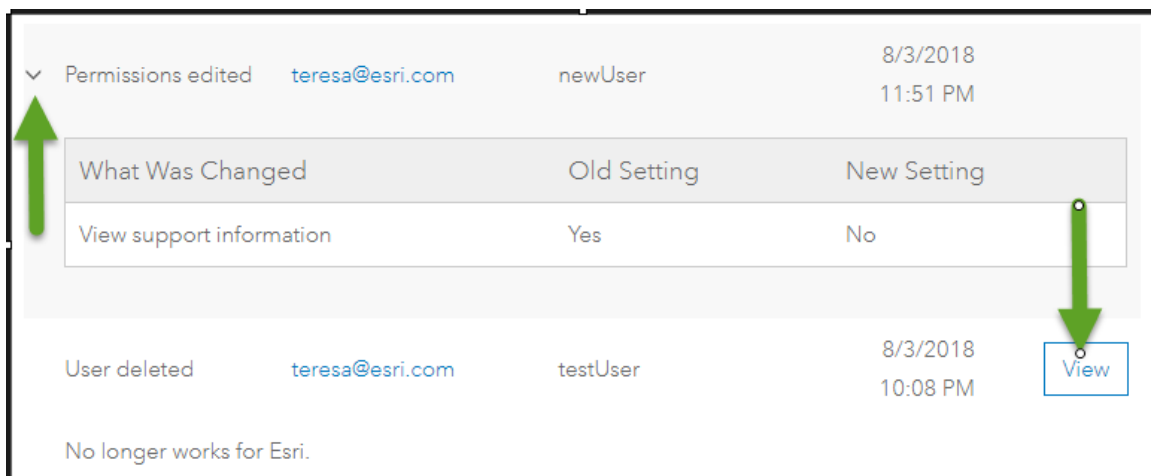


The screenshot shows a user profile for Teresa Dolan. The username is TDolanTest, and the email is tdolan@esri.com. The user is active. The permissions are listed as follows:

Permissions:		
• Purchase on Esri store	• Download software	• View training information
• Access e-Learning	• View event information	
• View support information		

- My Organizations / Users / Permissions Report. See which users have each permission.
- My Organizations / 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.

When were the permissions assigned? View the My Organizations / Users / Permissions Log to see who did what when. Expand an entry to get details about which permissions were edited. View the notes added by the admin by clicking the View button.



The screenshot shows a log entry for 'Permissions edited' by teresa@esri.com for user newUser on 8/3/2018 at 11:51 PM. The log entry is expanded to show a table of changes:

What Was Changed	Old Setting	New Setting
View support information	Yes	No

Below the table, there is a 'View' button. A green arrow points to the 'View' button.

What are the other admin permissions? There are two other permissions which grant a user limited admin ability.

- **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 add, edit, and delete authorized callers, who are those who can take actions on Technical Support cases and bugs. Authorized callers can also submit cases. These admins cannot see any other users connected to the organization; they only have access to My Organizations / Users / Manage Authorized Callers.



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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