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

- 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 ("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. 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.
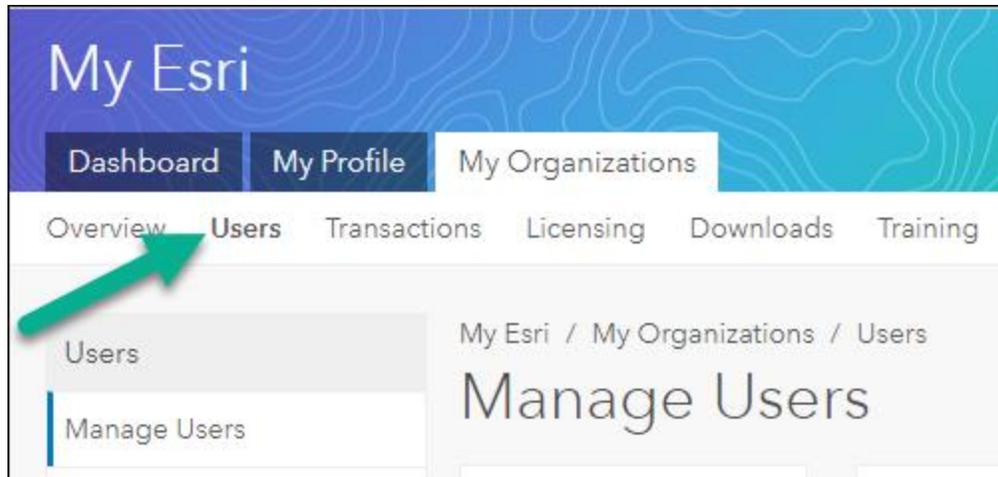
What are Permissions?

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: 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

Each of these responsibilities is described in detail 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.

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.

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.

My Esri / My Organizations / Users

Invite Users

ℹ More Information

Steps: 1 ☑ — 2: Permissions to Grant — 3

Step 2: Permissions to Grant

‹ Back

Set Time Limit

Grant All   Grant View Only   Clear All

Time Limit
○ None
● Time Range

Start Date
3/15/2021 📅

End Date
9/1/2021 📅

Use the time limit option to establish an ending date to a user's permissions. This may be useful when employing contractors who only need access for a specified period of time. Users whose permissions have expired will automatically be disconnected from your organization 30 days after the End Date.

Administrator   No   Description

Allows user to manage permissions for all users connected to the organization (for example, inviting others to connect to the organization, or granting and editing user permissions). Users with this permission see the My Organizations > Users sub tab.

Update organization details   No   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 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 a Technical Support contract, users at your organization will be able to use My Esri to submit cases. The users designated to submit cases are called **authorized**

callers. 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 a caller from Invite Users, you must only invite one user. 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.

View technical support information	**Yes**	Description
Take authorized caller actions	**Yes**	Description

First Name *
Milton

Last Name *
Waddams

Call-in ID * ⓘ Explain
1234

Caller Level *

☐ Premium (1 premium caller available)

☐ After Hours (No limit for after hours callers)

☐ Application Support (No limit for application support callers)

☑ Standard (49 standard callers available)

Assign authorized callers **No** Description

After turning on 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 Email to User 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.

Teresa Dolan
Username: TDolanTest
Permissions last modified on 11/16/2018
Last signed in on 11/16/2018 16:04:21

✓ Active   tdolan@esri.com

Permissions:

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

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. 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 invitations, too.

Just as on Invite Users, you can Preview the email before sending it, but unlike Invite Users you can decide 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.

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

Disconnect does NOT remove their ArcGIS public 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.
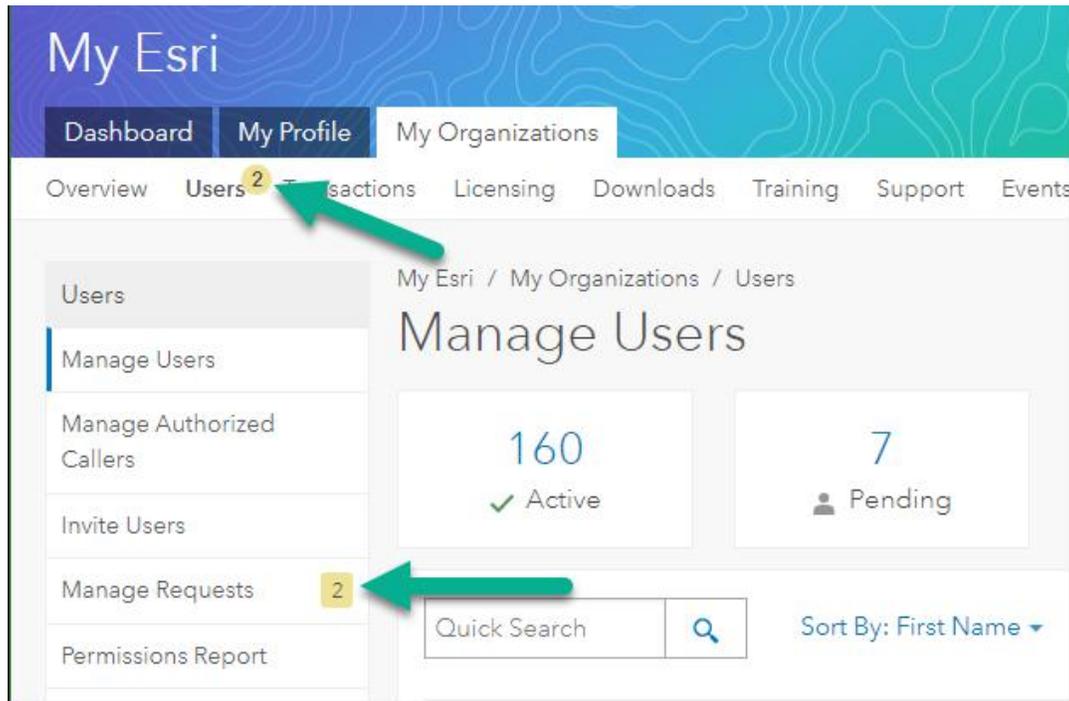
From My Organizations / Users, go to Manage Requests.

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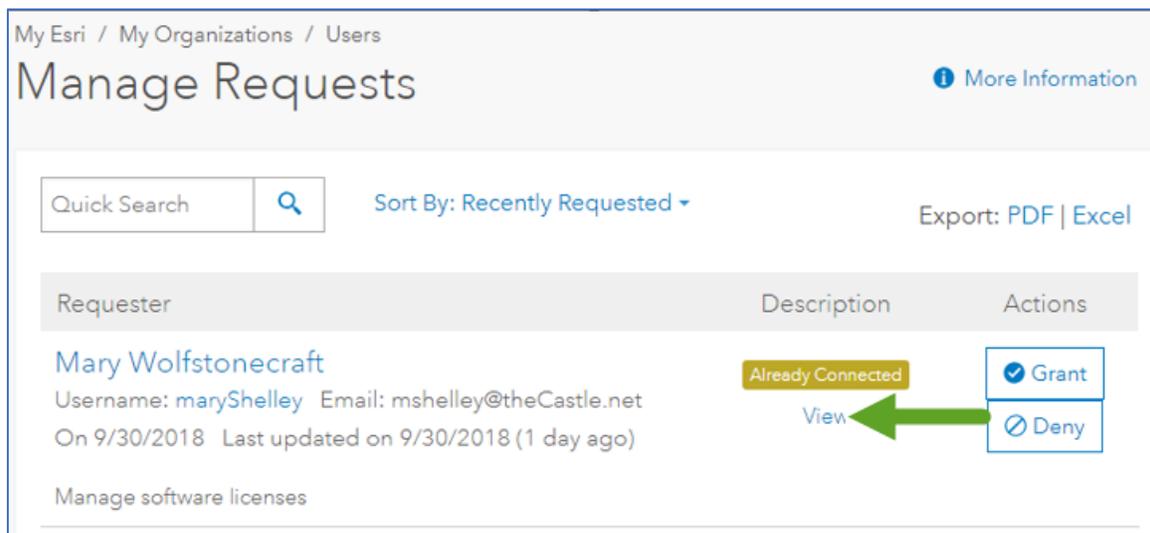
You can click the name or username to see the user's contact card.

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, as designated by your organization's support contract. 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.

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 ArcGIS Public 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. 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, so you may see different choices here than what is shown in the screenshot. Check all that apply.

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

newcaller@myorg.com

First Name *

Last Name *

Phone *

Phone Extension

Call-in ID *

Caller Level *

☐ Premium (No limit for premium callers)

☐ Standard (27 standard callers available)

Cancel   **Add Caller**

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 some 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.

- 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.

- My Organizations / Users / Manage Users. Use the Export to Excel link 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? 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.


What are the other admin permissions? These permissions grant the 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.

Need more help? Guided help is available for much of My Esri. Click My Esri Help, found along the side, for details. New tours are added regularly. If you don't find the help you are looking for, use the Ask a Question button, found throughout My Esri, to let us know what we could add that would help you.

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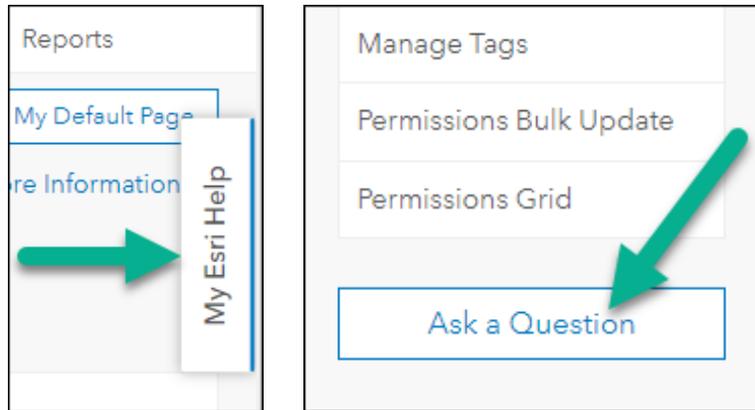
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Since 1969, Esri has helped customers unlock the full potential of data to improve operational and business results. Today, Esri software is deployed in more than 350,000 organizations including the world's largest cities, most national governments, 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.

Visit us at esri.com.

Contact Esri

380 New York Street
Redlands, California 92373-8100 USA

1 800 447 9778
T 909 793 2853
F 909 793 5953
info@esri.com
esri.com

Offices worldwide
esri.com/locations

For more information, visit
my.esri.com.