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.
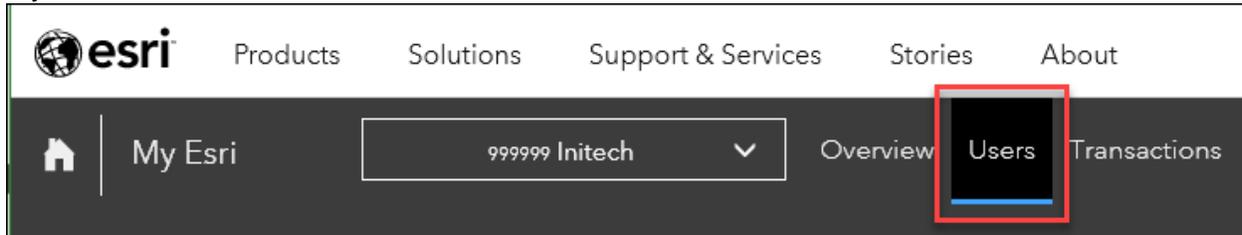
What are Permissions?

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: Add (Invite), Edit, Disconnect

- Managing Authorized Callers: 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.
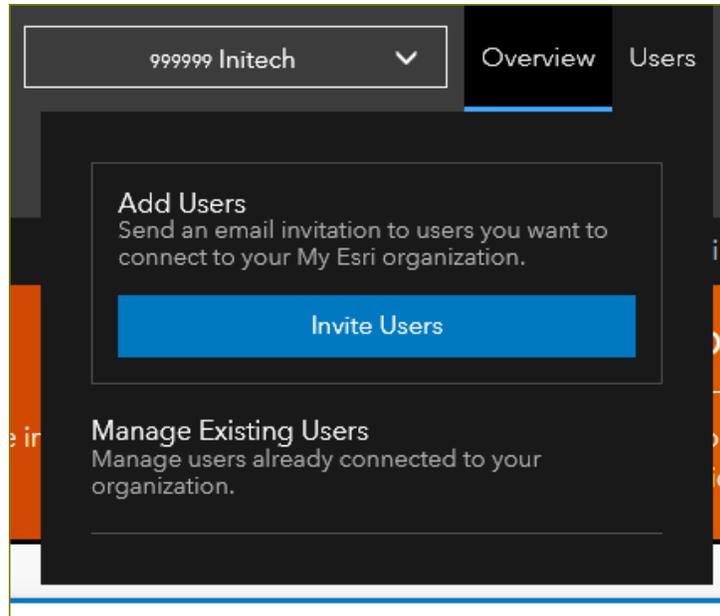
First, provide the email addresses, either one-by-one, or from an .xlsx or .csv file. You can invite up to 1,000 users at a time.
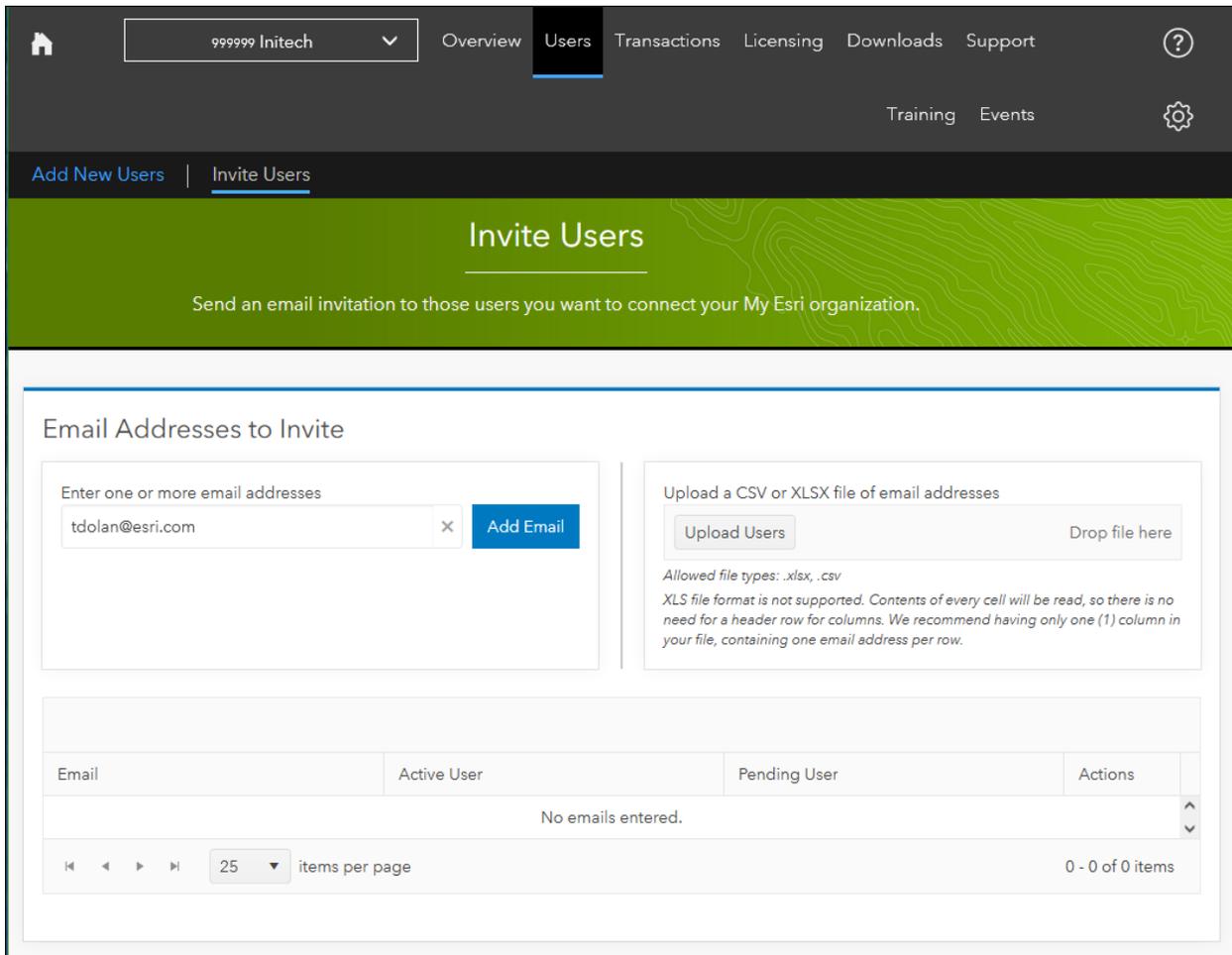
Any email address that fails to pass basic email formatting validation are not added to the invitation list. Remove any address from the list by clicking the red trash can in the Actions column. Click Remove All Emails to clear the list, and click Cancel at the bottom of the page to start over.

Email	Active User	Pending User	Actions
tdolan@esri.com		✅	🗑️
msutton@esri.com	✅		🗑️
jbeaton@esri.com			🗑️

Remove All Emails

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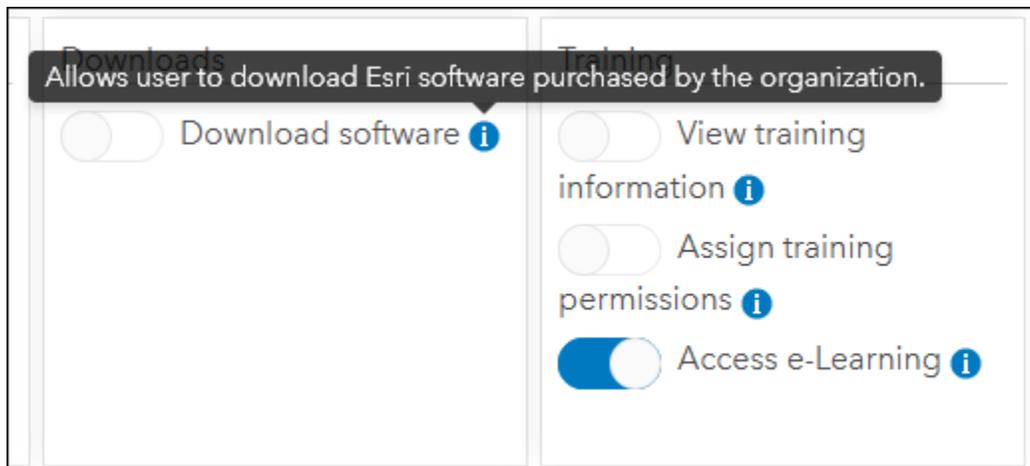
In addition to the permissions, you can optionally add a tag, to help you organize the users.

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.

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.

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.

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.


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 **teresa@esri.com** have been updated successfully.   ✕
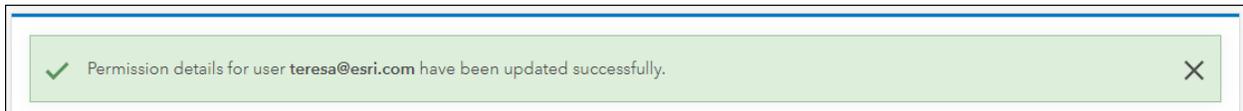
Manage Users: Resend Invitation
Sometimes a user deletes their invitation before accepting its token. Resend the invitation email using **Resend Invitation**, found on Home / Users / Manage Existing Users / Manage Users. You'll see some familiar tools here.
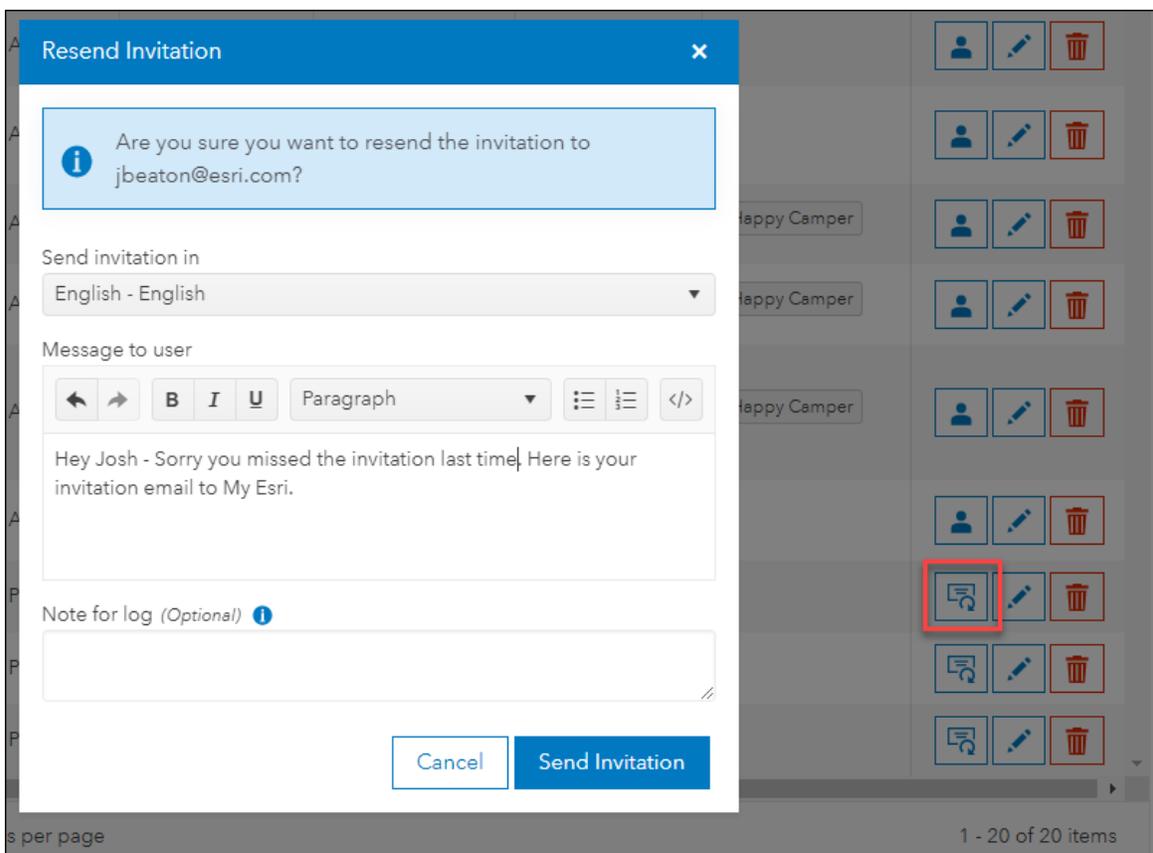
Manage Users: Disconnect

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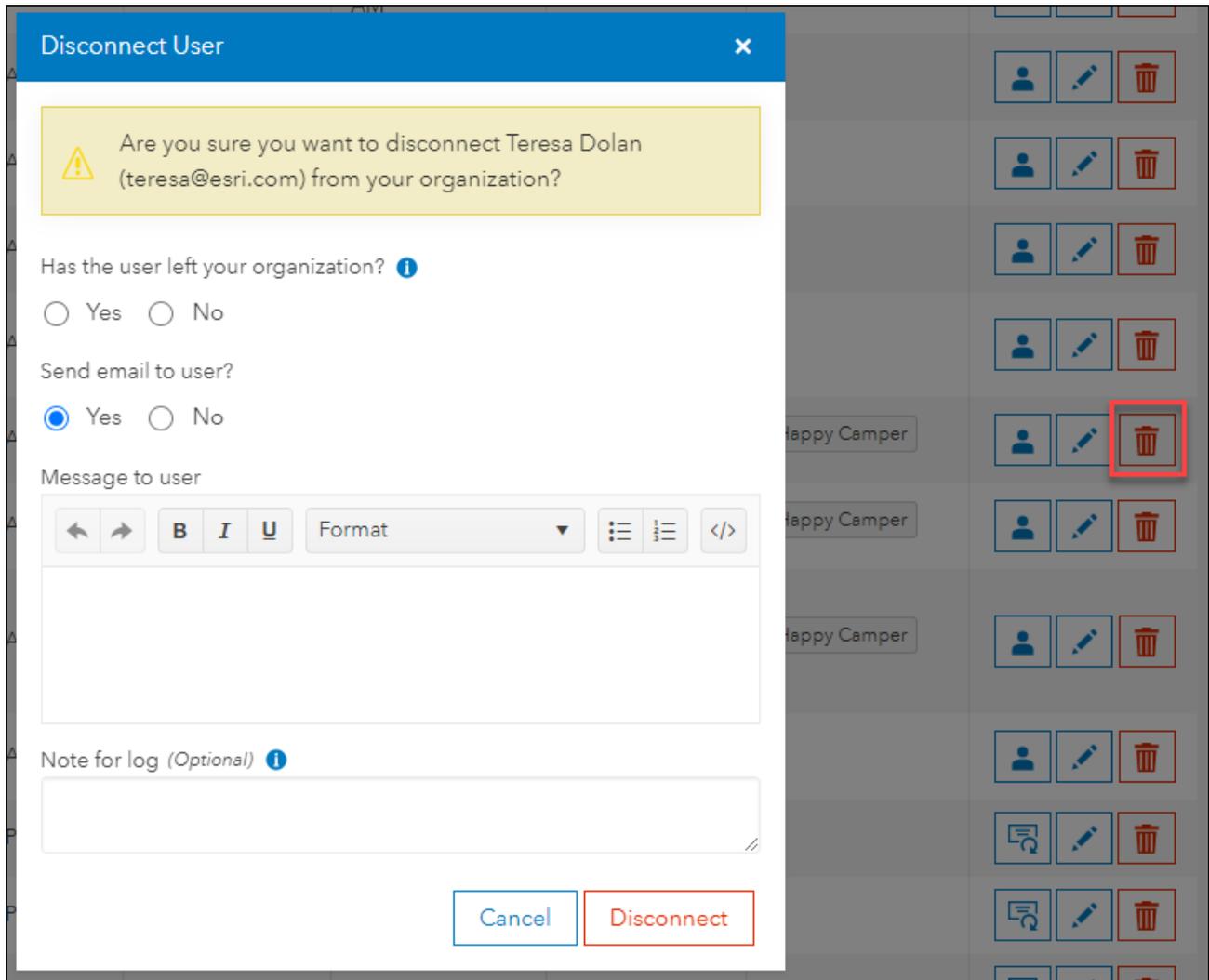

This simply removes all their permissions to your organization so that they will no longer have access to your organization's information on My Esri.

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.
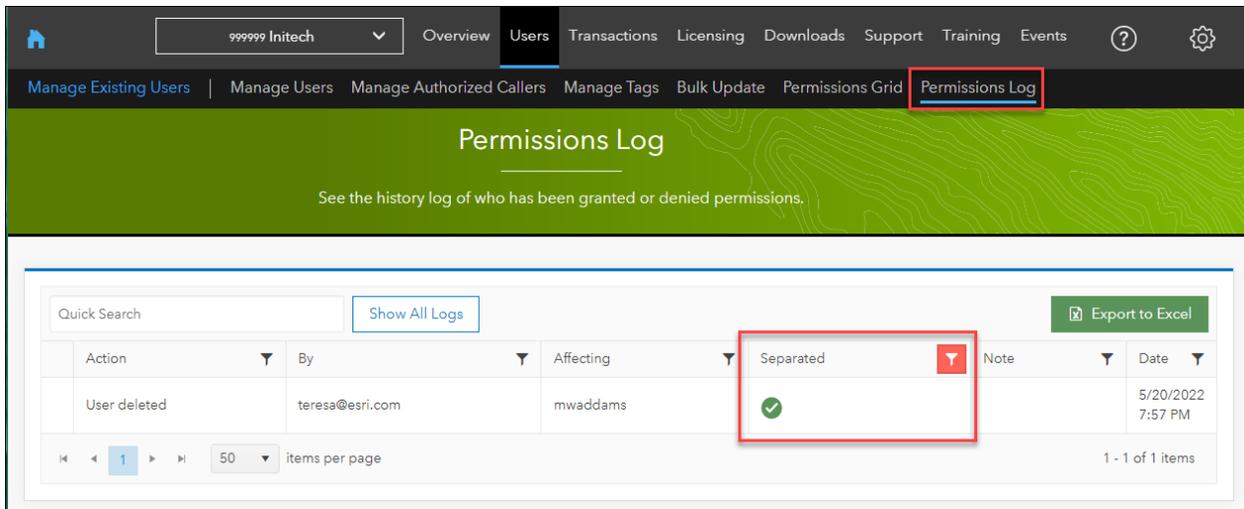
Manage Authorized Callers

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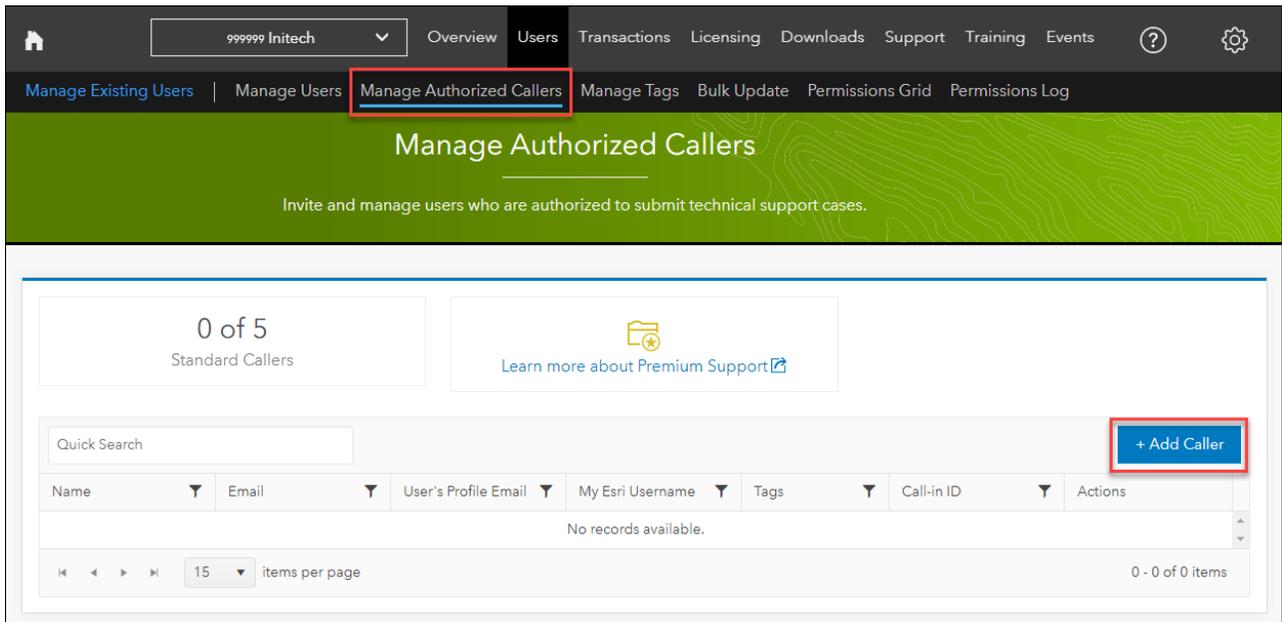
From here, click Add Caller. The options you see on the form are tied to your support maintenance contract, your organization's country, and other factors, so what you see may differ from the screenshots below.

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 ✕

> ℹ️ 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

Email

mwaddams@initech.com ✕

First Name

Milton ✕

Last Name

Waddams ✕

Phone Number

714 555 1234 ✕

Phone Extension *(Optional)*

Language

English - English ▼

Caller Level

☐ Premium (1 available)
☑ Standard (Unlimited)

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 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.


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.

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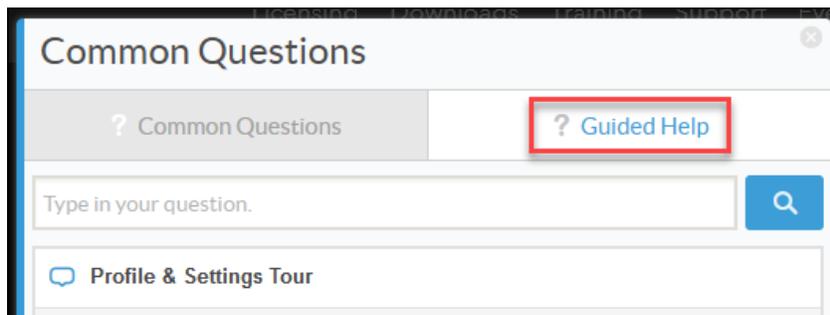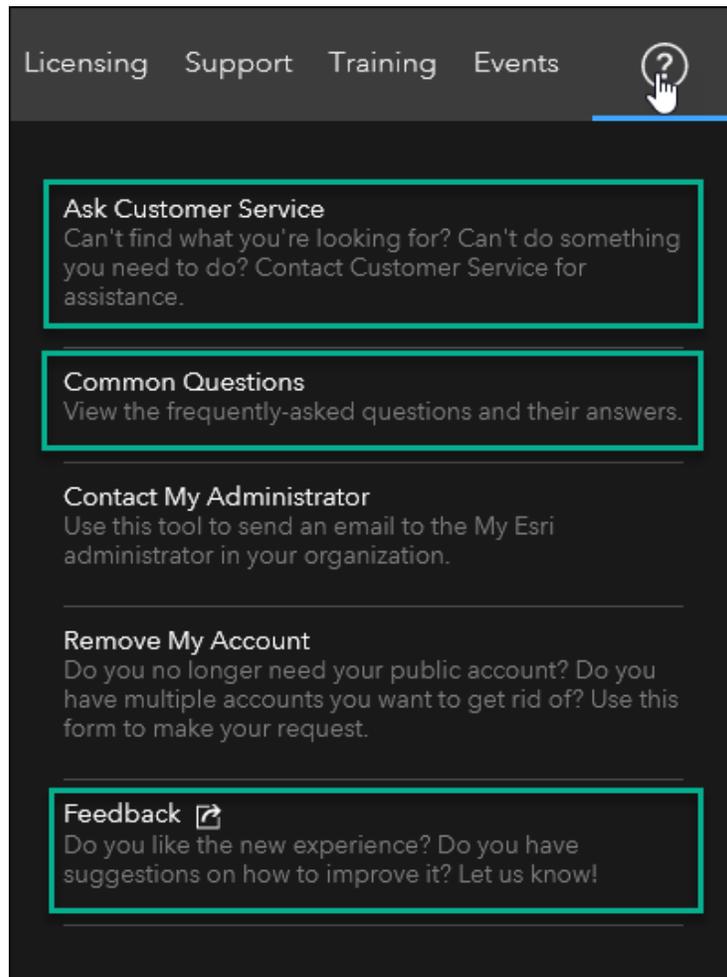
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Since 1969, Esri has helped customers unlock the full potential of data to improve operational and business results. Today, Esri software is deployed in more than 350,000 organizations including the world's largest cities, most national governments,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

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