ESRI Training Procedures – Update October 28, 2016

Easier Administration for Large Numbers of Users

As your organization's My Esri or Training administrator, we want you to know about improved tools for e-Learning management.

Everyone in your organization is eligible for unlimited access to self-paced e-Learning on the Training site. E-Learning access is enabled by connecting individuals to your customer organization in My Esri. We recently added these features to make it easier to connect and manage large numbers of individuals:

Manage Users page

- You can now use a filter to view e-Learning-only users separately from users that have additional My Esri permissions.

Invite Users page

- You can now upload a spreadsheet of email addresses.
- My Esri will check to see if email addresses match those of users who are already connected to your organization or have a pending invitation to connect.
- Each email address will display on its own row.
- You will see an indicator if an email address is invalid, matches a connected user's email address, or matches a pending invitation.
- You can immediately view invalid email addresses, correct a typo if necessary, or remove an email address from the invite list.

For detailed instructions on how to connect users and manage e-Learning access in My Esri, view this document.

If you have questions about this notice, please email training@esri.com.

Best regards,
The Training Team

Managing Access to Esri Self-Paced E-Learning: Administrator's Guide

Effective August 15, 2016, all Esri customers that have a qualifying product that includes a current maintenance subscription receive unlimited access to self-paced e-Learning on the Training website. Individual e-Learning access does not require a product license or named user status.

E-Learning access is managed on the My Esri site. In My Esri, "organization" refers to the customer's place of business, school, governmental organization, or other entity. It does **not** refer to an ArcGIS Online Organization. E-Learning access is enabled when a user's Esri account is connected to your customer organization in My Esri.

My Esri administrators manage all permissions for all connected users. A My Esri administrator may designate one or more Training administrators to manage users whose only permission will be e-Learning access.

Training administrators may

- Send email invitations to connect individuals to the customer organization in My Esri, which enables e-Learning access.
- Set a time range to limit the e-Learning access term.
- Remove individuals whose only permission is e-Learning access.

This document contains tips, step-by-step instructions for administrative tasks, and Common Questions.

Tips for E-Learning Administration

Are users that require e-Learning access already connected to your organization in My Esri?

You do not need to take any action for these users. Everyone connected to an organization with current maintenance in My Esri has e-Learning access enabled by default.

Would you like users to connect using a specific Esri account?

By default, the individual receiving the email invitation will login with the account of their choosing. If you would like individuals to use a specific account, add a custom message with instructions in the invitation email.

Will ArcGIS Online Organizational or Enterprise Accounts be used for e-Learning?

The ArcGIS Online administrator must enable Esri access for these users in ArcGIS Online before they are invited to connect in My Esri.

Do you have a small number of users (less than 100) who need to be connected for e-Learning access?

Invite all the users at once using the My Esri email tool.

Do you have a large number of users (hundreds or thousands) who need to be connected for e-Learning access?

Designate one or more Training administrator(s) to manage these users.

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For users who require only e-Learning permission, do they require long-term access (as long as their employment continues) or short-term access (a single semester or a defined project/contract term)?

For short-term access, set a Time Range for user access. When the access period expires, the individual will remain connected in My Esri but they will not be able to access e-Learning. Their e-Learning access can be restored easily by setting a new Time Range.

Do you have internal approval processes that regulate how individuals request and take training?

Integrate e-Learning access into the existing processes. Decide whether each user should request access by submitting the Request Permissions form or if an administrator should invite all approved users to connect to the organization.

Administration Tasks: Step-by-Step Instructions

Designate a Connected User to Be a Training Administrator

1. Go to my.esri.com and login.
2. Click the My Organizations tab.
3. On the left under My Organizations, click Manage Users.
4. Find the individual in the table of users. *Tip:* Clicking a column heading sorts the table.
5. Click the Edit (pencil) icon.
6. On the Edit Permissions page, scroll down to see the available Training Permissions.
7. In the Choice column, click the bar next to "Assign training permissions" to select Yes.

Training Permissions	Choice	Description
View training information	No	Allows user to view training information for the organization (for example, Instructor-Led classes and Annual User License training reports).
Assign training permissions	Yes	Allows user to manage e-Learning permissions for the organization (for example, inviting others to connect to the organization specifically for self-paced e-Learning).
Access e-Learning	Yes	Allows user unlimited access to self-paced e-Learning on the Esri Training website.

8. Click Update.

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Invite Individuals to Connect and Become a Training Administrator

Note: If Training administrators are going to use an ArcGIS Online Organization login, the ArcGIS Online administrator should enable Esri access for each individual before you invite them to connect in My Esri.

1. Go to my.esri.com and login.
2. Click the My Organizations tab.
3. On the left under My Organizations, click Manage Users > Invite Users.
4. In the "Enter one or more email addresses" text box, enter one or multiple email addresses, then click Continue.
5. If desired, add your own message to the email invitation and a note for the log.
6. Scroll down to see the available Training permissions.
7. In the Choice column, click the bar next to "Assign training permissions" to select Yes.
8. If desired, preview the invitation, then click Send Invitation.

When individuals click Get Started in the email, they are prompted to login or create an Esri Account. After logging in, the individual's account is connected to your organization in My Esri and they have the "Assign training permissions" permission, which designates them Training administrators. They may now invite other users to connect to the customer organization and enable e-Learning access (instructions below).

Connect Individuals to Your Organization

Note: If ArcGIS Online Organizational Accounts are going to be used for e-Learning access, the ArcGIS Online administrator must enable Esri access for each individual before you invite them to connect.

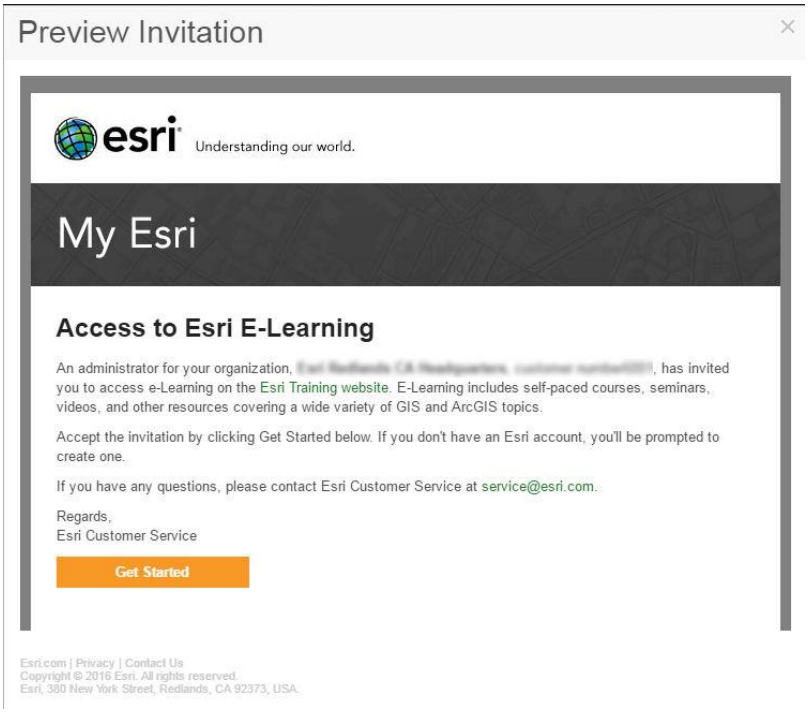
1. Go to my.esri.com and login.
2. Click the My Organizations tab.
3. On the left under My Organizations, click Manage Users > Invite Users.
4. In the "Enter one or more e-mail addresses" text box, you may manually enter one or multiple email addresses.

If you need to invite many users at once:

- Copy/paste up to 100 email addresses from a CSV or text file into the "Enter one or more email addresses" text box. The email addresses can be separated by commas, spaces, or semicolons.
- Click Upload Users and upload an XLSX file or CSV file of email addresses (up to 1,000 rows). The file should have only one column and one e-mail address per row. Do not include a header row or additional columns. *Note:* The XLS file format is **not** supported.

5. Click Continue.
6. If desired, add your own message to the email invitation and a note for the log.
7. If desired, set a time range for e-Learning access.
8. If desired, preview the invitation.

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9. Click Send Invitation.

When individuals click Get Started in the invitation email, they will be prompted to login with an Esri account or create an account and then login. After logging in, the individual's account is connected to your organization in My Esri and their access to e-Learning is enabled.

Manage Users

The Manage Users page lists all individuals who are connected to the customer organization as well as individuals who have been invited to connect.

- My Esri administrators may invite, remove, and edit the permissions of any connected individual and approve requests to connect to the organization.
- Training administrators may invite, remove, and set a time range for e-Learning access for individuals whose **only** My Esri permission is "Access e-Learning."

View the Status of a Sent Invitation

1. On the Manage Users page, find the individual in the table of users.
   - *Tip:* Clicking a column heading sorts the table.
2. In the Status column, a gray dot indicates the invitation is pending (the individual has not clicked the Get Started button in the email invitation, or they clicked it but did not complete the login process).
3. To resend an email invitation, in the Actions column, click the email icon.
4. In the Resend Invitation dialog box, add a custom message and note for the log if desired, then click Send Invitation.

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Set a Time Range for E-Learning Access

A time range for e-Learning access can be set when inviting users to connect (see instructions for Connecting Users), or one user at a time after they are connected. Setting a time range is useful to colleges, universities, and other organizations that have many learners who require short-term access.

To set a time range for a connected user:

1. On the Manage Users page, find the individual in the table and click the Edit (pencil) icon.
   - *Tip:* Clicking a column heading sorts the table.
2. On the Edit Permissions page, click Time Range and set the appropriate End Date.
3. Choose whether you want the user to receive an email notification.
4. Click Update.

Remove a User

Training administrators can remove individuals whose only My Esri permission is e-Learning access. My Esri administrators must remove individuals who have multiple permissions.

1. On the Manage Users page, find the individual in the table and click the Delete User icon (X).
   - *Tip:* Clicking a column heading sorts the table.
2. Click Delete to confirm that you want to remove the individual from your organization.

Approve a Request to Connect to Your Organization

All My Esri administrators (but not Training administrators) receive an email notification when a user submits the Request Permissions form. If the individual is affiliated with your organization:

1. Go to the My Esri site and login.
2. Click My Organizations > Manage Users > Manage Requests.
3. Click the Description link to verify the permission requested by the user.
4. Click Grant. On the Grant Permissions page, scroll down to see that the "Access e-Learning" permission is set to Yes.
5. If you would like to send the user an email notifying them their request has been granted, add a custom message if desired. If you do not want to send the user an email, click No next to "Send E-mail to user."
6. Click Grant.

All My Esri administrators for your organization will receive an email notification that the user's request was approved (if you entered a custom message in the user email, that text also displays in the notification).

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Common Questions

Which accounts can be connected for e-Learning access?

These Esri accounts can be connected to your organization in My Esri, which enables e-Learning access:

- Public Account (refers to an Esri Account or ArcGIS Online Public Account)
- ArcGIS Online Organizational Account
- Enterprise Account (an ArcGIS Online Organizational account configured for enterprise access)

If ArcGIS Online Organizational or Enterprise Accounts will be used, the ArcGIS Online administrator must enable Esri access in ArcGIS Online before the users are invited to connect to the organization in My Esri. See this help topic for instructions.

What if users don't have an account?

A Public Account is free and easy to create here.

Can our ArcGIS Online administrator manage e-Learning access?

E-Learning access is managed in My Esri. If individuals want to use their ArcGIS Online Organizational or Enterprise Accounts for e-Learning access, the ArcGIS Online administrator will need to enable Esri access for them before they are invited to connect in My Esri. See this help topic for instructions.

If I connect a user's ArcGIS Online Organizational Account in My Esri, what happens to the user's training history when they are removed from the ArcGIS Online Organization?

Esri can transfer training history from an ArcGIS Online Organizational Account to a Public Account. The user should contact Customer Service for assistance.

I emailed an invitation to connect to our organization in My Esri, but the user did not receive it.

The email may be in the user's spam folder. Instruct the user to check for an email from My Esri.

If the email is not in the user's spam folder, in My Esri, go to the Manage Users page and check your list of pending invitations (indicated by a gray dot). Verify the email address is correct. Resend the invitation if necessary.

A user clicked the link in the email invitation and signed in. However, on the Training site, the user sees a message they are not connected to an organization with maintenance. They cannot access e-Learning.

- Many users have multiple Esri accounts. Verify the user signed in to the Training site with the same account that is connected to your customer organization in My Esri. They may need to sign out, then sign in again using the correct account.
- If the user's ArcGIS Online Organizational or Enterprise Account is connected in My Esri, verify the ArcGIS Online administrator has enabled Esri access.
- If you have verified the user is logging in with the correct account, it is possible your organization's maintenance agreement has expired. View your organization's maintenance status on the My Organizations > Organization Transactions page.
- If your maintenance agreement is current and the user still cannot access e-Learning, contact Esri Customer Service for assistance.

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