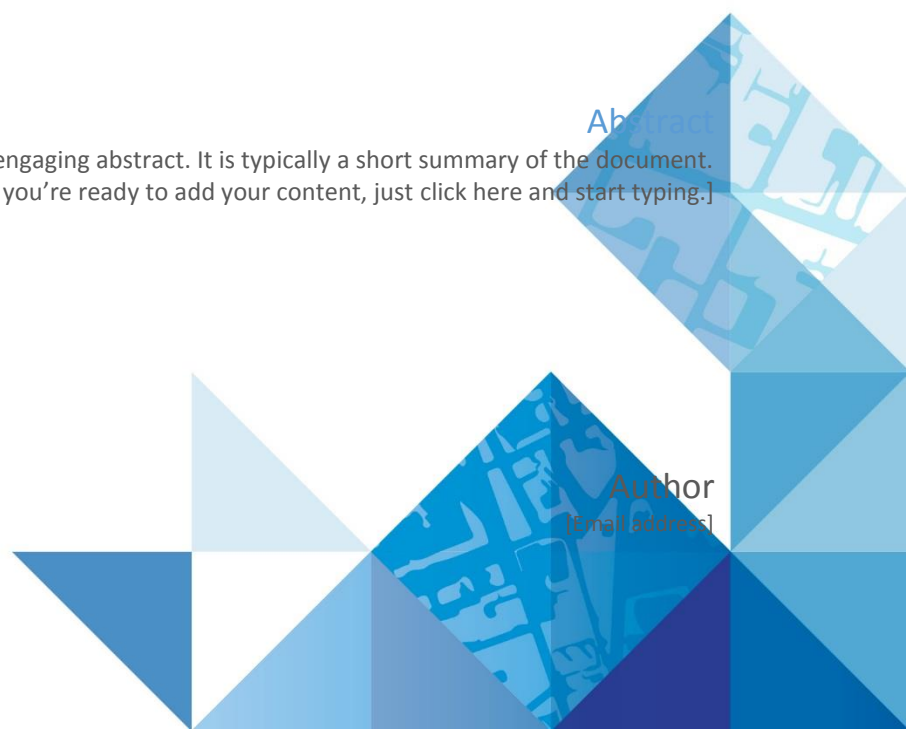# DOCUMENT TITLE

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Abstract

[Draw your reader in with an engaging abstract. It is typically a short summary of the document. When you're ready to add your content, just click here and start typing.]

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The following document describes high level governance structure for ==customer's== ==ArcGIS Online/Portal for ArcGIS== deployment. ==ArcGIS Online/Portal for ArcGIS== is a Web GIS platform upon which organizations can create interactive maps and web mapping applications and share them within their agency, among organizations, or to the public. This guide covers the following topics:

- Guiding Principles for Content, Discovery, Sharing, and Collaboration
- Guidelines for Items
  - Creating and Adding Items
  - Item Details
  - Authoritative Items
  - Basemap Items
  - Operational Items
  - User and Project Specific Items
- Guidelines for User Accounts
  - Provisioning Users
  - Administering Users
  - Auditing Users
- Guidelines for Groups
  - Creating Groups
  - Public, Built-in Groups
  - Operational Groups
  - Synchronizing Operational Groups
  - Project Groups Featured Groups
- Guidelines for Sharing
  - Sharing with the Public (Everyone)
  - Sharing with Project Groups
- Guidelines for Security

Links to Esri documentation and materials related to ==ArcGIS Online/Portal for ArcGIS== are provided throughout this document.

This is a living document and is expected to change through collaboration with ==customer== staff and others.

Guiding Principles for Content, Discovery, Sharing, and Collaboration

At its core, ==ArcGIS Online/Portal for ArcGIS== is a geospatial content management system which allows users to create web maps, web mapping applications, and GIS web services. Other features include the ability to edit data using a web browser or mobile device, the ability to embed maps into external websites, and the ability conduct geocentric analysis.

==ArcGIS Online/Portal for ArcGIS== governance incorporates the following guiding principles to ensure the geographic information and resources are protected, while also providing value and meaningful use for the ==customer name== community in the following ways:

- Sharing is welcome.
  - ==ArcGIS Online/Portal for ArcGIS== is governed to promote sharing and important productive collaboration in ==customer name==. The ==customer name== community is encouraged to access, create, and share geographic materials through the ==ArcGIS Online/Portal for ArcGIS==.
- Sharing to Everyone must be done in a carefully considered manner.
- When in doubt, share privately.
- Self-service mapping, analysis, discovery, collaboration is encouraged in ==ArcGIS Online/Portal for ArcGIS==.
- Reuse is vital.
  - Reuse web maps, web apps, items, groups, etc., and minimize duplication of GIS content among the ==customer name== community.
- Discovery and searching requires meaningful metadata.
- Authoritative content is shared through authoritative groups.
- Authoritative basemaps are shared to Everyone.
- ==ArcGIS Online/Portal for ArcGIS Administrators will own and govern authoritative operational items and groups.==
- ==ArcGIS Online/Portal for ArcGIS== Administrators will own and govern basemaps and associated groups.
- ==ArcGIS Online/Portal for ArcGIS== Administrators will monitor content creation and sharing for authoritative and user resources.

Guidelines for Items

Governing items in the ==ArcGIS Online/Portal for ArcGIS== includes rules and guidelines for creating authoritative and project items, metadata/details used in item publishing, items shared in Featured Content, items shared in the Gallery, access to registered web resources (services, web apps), among others.

Creating and Adding Items

The following rules and guidelines will be enforced as users create and add items to ==ArcGIS Online/Portal for ArcGIS==:

- All users will be able to add items to their account (My Content).
- All users will be able to add geographic information in the forms of maps, layers, files, etc.
- All users will be able to add these types of geographic information: [Types of Geographic Information](#)
- All users will add items with consistent item details (i.e. metadata) using the guidelines in the Item Details section below.

Item Details

For consistent structure and search of items and geographic information in ArcGIS Online/Portal for ArcGIS, users, publishers, and administrators will use the following guidelines to populate the details of each item (i.e. metadata).

Item Details	Content
Title	Titles should be simple and easily understandable, aligned with any naming convention of the content in the item. For authoritative items, the title should include keywords like…
Summary	This short description is returned in the results list when people search for content in the website.
Description	People see this in-depth description of the item when they open the item page.
Tags	Tags are used to find items when people search for them. The tags you specify should correspond to keywords you think people will use to search for your item. Do not repeat keywords that are included in Title, Summary, or Description.
Access and Use Constraints	This section provides information about how the item can be used and by whom. For example, you might have a use constraint for a map layer that requires others to display copyright information on any screen capture that includes the layer.
Credits	Your item may contain data from different agencies or individuals. This is the place to give credit to the data providers.
Thumbnail	A thumbnail image is created by default when you add the item to the site. It appears in galleries, search results, and the details page. You can create and load a different image if the default image does not convey the information you want. For best results, add an image that is 200 pixels wide by 133 pixels high in a web file format such as PNG, GIF, or JPEG. The maximum file size is 1 MB. If your image is a different dimension, it is resized to 200 by 133 pixels and may appear warped.

Authoritative Items

For authoritative items and geographic information, the following rules and guidelines will be enforced as users create and add authoritative items and geographic information in ArcGIS Online/Portal for ArcGIS:

- Authoritative services will be managed/governed by dedicated administrators.

- Dedicated administrators will be assigned to be the custodians of ==ArcGIS Online/Portal for ArcGIS== items.

Basemap Items

Basemaps are considered a special type of authoritative item in the ==ArcGIS Online/Portal for ArcGIS==. The following rules and guidelines will be enforced as administrators create and add basemaps to the ==ArcGIS Online/Portal for ArcGIS==:

- ==Basemaps will be shared with Everyone.==
- ==Administrators will own basemaps.==

User and Project Items

For user and project specific items and geographic information, the following rules and guidelines will be enforced as users create and add authoritative items and geographic information to the ==ArcGIS Online/Portal for ArcGIS==:

- Individual and project specific items will be private (default) when created and until they are ==shared with authoritative groups.==
- Each user will own and be the custodian of individual and project specific items.
- Each user will share individual and project specific items through dedicated groups.
- ==Administrators will take ownership of individual and project specific items when they are shared authoritative groups.==

Guidelines for User Accounts

Governing users in the ==ArcGIS Online/Portal for ArcGIS== includes provisioning users, administering user accounts (profile, passwords, and visibility), enforcing sharing and access rules and guidelines for each user, user Role, administering the items and My Content of each user, auditing users, among others.

Provisioning Users

For provisioning users in ==ArcGIS Online/Portal for ArcGIS==, the following rules and guidelines will be enforced for each user:

- ==(For Portal)== All users on the ==customer== network (i.e. intranet) will be able to create an account in ==ArcGIS Online/Portal for ArcGIS, by simply signing into the ArcGIS Online/Portal for ArcGIS, through auto-registration.==

Administering Users

For administering users in ==ArcGIS Online/Portal for ArcGIS==, the following rules and guidelines will be enforced for each user:

- ==(For Portal) All== users on the ==customer network== will have access to ==Portal for ArcGIS==.
- Users will be allowed to upload content in My Content (e.g. new web maps, upload packages, etc.)
- Users are allowed to ==create groups, invite users, and share items for project specific activities==.
- Password policies will be enforced automatically through ==built-in/enterprise user store configuration== of the ==ArcGIS Online/Portal for ArcGIS==.

- Administrators will determine the role of each user.

Role Description	Role Name
Regional GIS Manager (regional admin)	Regional GIS Manager (regional admin)
Regional GIS Analyst (regional analyst)	Regional GIS Analyst (regional analyst)
Installation GIS Managers (installation admin)	Installation GIS Managers (installation admin)
Functional Data Managers (functional admin)	Functional Data Managers (functional admin)
Functional GIS Analyst (functional analyst)	Functional GIS Analyst (functional analyst)
Functional SMEs (functional sme)	Functional SMEs (functional sme)
Restricted Viewer (users with access to restricted data sets)	Restricted Viewer (users with access to restricted data sets)

Type	Privileges	Regional GIS Manager (regional admin)	Regional GIS Analyst (regional analyst)	Installation GIS Managers (installation admin)	Functional Data Managers (functional admin)	Functional GIS Analyst (functional analyst)	Functional SMEs (functional sme)	Restricted Viewer (users with access to restricted data sets)
Groups	Create, update, and delete groups.							
Groups	Join organizational group							
Content	Create, update, and delete groups.							
Content	Publish hosted feature layers.							
Content	Publish hosted tile layers.							
Content	Publish hosted scene layers							
Groups	Create, update, and							

	delete groups.							
Sharing	Share with groups.							
Sharing	Share with portal							
Sharing	Share with public.							
Sharing	Make groups visible to portal							
Sharing	Make groups visible to public.							
Members	View All							
Members	Update							
Members	Delete							
Members	Disable							
Members	Change roles							
Members	Manage licenses							
Groups	View All							
Groups	Update							
Groups	Delete							
Groups	Reassign ownership							
Groups	Assign ownership							
Groups	Assign members							
Groups	Link to enterprise group							
Content	View All							
Content	Update							
Content	Delete							
Content	Reassign ownership							

- Each user will manage their individual profiles (e.g. description, picture, etc.)

Auditing Users

For auditing users and their activity in ArcGIS Online/Portal for ArcGIS, the administrator will use the following tools and resources:

- Portal REST API
  - https://<host>/arcgis/sharing/rest/portals/<0123456789ABCDEF>/users

- Portal Logs
    - <install drive>:\<install dir>\arcgisportal\logs\webserver
    - <install drive>:\<install dir>\arcgisportal\logs\database
    - <install drive>:\<install dir>\arcgisportal\logs\runtime
- Windows Event Viewer (see Security Logs)
- IIS/Apache Logs
- Web Analytics software

Guidelines for Groups

Governing groups in ArcGIS Online/Portal for ArcGIS includes rules and guidelines for creating authoritative and project items, managing membership in groups, metadata/details used in group creation, management of public groups, operational/authoritative groups, and private, project groups, among others.

Creating Groups

The following rules and guidelines will be enforced as administrators and users create groups ArcGIS Online/Portal for ArcGIS:

- Users are allowed to create groups, invite users, and share items for project specific activities.
- Project and operational groups must be private until permission is given by administrators to extend access to Everyone in ArcGIS Online/Portal for ArcGIS.
- Contributors to project and operational groups must be "group owner" only until permission is given by administrators to extend contributions to "all members".
- Administrators will create and own operational and authoritative groups.
- Users can only contribute items to authoritative or operational groups through the owner (i.e. administrator) of the group. This is enforced automatically in the creation of each authoritative and operational group.

Table 3: Content Metadata Details

Group Details	Content
Name	Names should be simple and easy to understand, aligned with any naming convention of the group's purpose. For authoritative items, the title should include keywords like…
Summary	A meaningful group summary should be created to describe the purpose and audience for the group.
Description	A meaningful group description should be created to describe the purpose and audience for the group.
Tags	Tags are used to find groups when people search for them. The tags you specify should correspond

	to keywords you think people will use to search for your group.
Status	Private, Organization, Public
User Can Apply to Join	Yes or No
Contributors	Owner only or all members
Thumbnail	

Operational Groups

ArcGIS Online/Portal for ArcGIS will have operational groups that are sometimes publically available or privately available through invitation only. These groups can be authoritative groups of operational items and geographic information or non-authoritative.

These groups provide include mission specific geographic information and items to particular applications and users in the customer name enterprise. Moreover, they can include categories of users outside the customer name organization, like contractors, partners, 3rd party, etc.

For governing operational groups in ArcGIS Online/Portal for ArcGIS, the following rules and guidelines will be enforced for each operational group:

- Administrators will own and administer Operational groups.
- Operational groups will be private, so Everyone cannot find this group and specified users can access by invitation only
- The owner of the Operational group will be responsible for Operational group membership and invitations.
- The owner of the Operational group will be responsible for access to sensitive items and geographic information in the Operational group.
- Administrators will create and manage membership of items and users in Operational groups.
- Administrators will use the guidelines above for populating the details of a Operational group during the creation of an Operational group.
- Administrators will monitor and audit access to Operational items in Operational groups.

Project Groups

ArcGIS Online/Portal for ArcGIS will have project groups that users create to share items and geographic information for a particular project. They are always privately available to users, and membership is through invitation only. These groups are often not authoritative groups, but can be used to collaborate and share among small groups of users to create authoritative items and geographic information that will be promoted to operational groups (i.e. wider audience).

For governing project groups in ArcGIS Online/Portal for ArcGIS, the following rules and guidelines will be enforced for each project group:

- Project groups will be private, so Everyone cannot find this group and specified users can access by invitation only.
- The owner of the project group will be responsible for project group membership and invitations.
- The owner of the project group will be responsible for access to sensitive items and geographic information in the project group.
- Users will create and manage membership of items and users in project groups.

- Administrators will monitor and audit access to project items in project groups.

Featured Groups

For governing Featured Groups in ==ArcGIS Online/Portal for ArcGIS,== the following rules and guidelines will be enforced:

- Administrators will manage the groups in ==ArcGIS Online/Portal for ArcGIS== (public, operational, project) that will be featured (i.e. promoted) in the ==ArcGIS Online/Portal for ArcGIS== .

Guidelines for Sharing

==ArcGIS Online/Portal for ArcGIS== is governed to promote sharing and important productive collaboration. Sharing geographic information and collaborating in ==ArcGIS Online/Portal for ArcGIS== is done by sharing items to specific groups and inviting users to become members of the group.

To ensure geographic information is protected and shared appropriately, the following rules and guidelines exist for sharing information with Everyone, operational collections of users, and users working on a project.

Sharing with ==Public== (Everyone)

Sharing items and geographic information with Everyone means that every user in ==ArcGIS Online/Portal for ArcGIS== will have access to it. The Everyone group provides the broadest reach of geographic information in ==ArcGIS Online/Portal for ArcGIS==.

The following rules and guidelines will be enforced for sharing items and geographic information with Everyone:

- Sharing to Everyone is ==only allowed with permission from administrators.==
- Administrators will monitor and audit access to items shared with Everyone.
- ==Administrators own items shared with Everyone.==

Sharing with Gallery and Featured Content Groups

The Gallery and Featured Content groups are a Public group. Sharing items and geographic information with these groups offers ==customer name== the opportunity to advertise, showcase, and promote key items and geographic information with Everyone on the Home page and Gallery page in ==ArcGIS Online/Portal for ArcGIS== web site.

The following rules and guidelines will be enforced for sharing items and geographic information with the Gallery and Featured Content groups:

- Sharing to Gallery and Featured Content groups is ==only done by administrators.==
- ==Administrators will share and own items shared with Gallery and Featured Content groups.==
- Administrators will monitor and audit access to items shared with Gallery and Featured Content groups.

==Sharing with Public Operational Groups==

Public Operational groups share items and geographic information with Everyone. Sharing items and geographic information with these groups offers customer name the opportunity to manage access to categories of geographic information with Everyone.

The following rules and guidelines will be enforced for sharing items and geographic information with Public Operational groups:

- Sharing to Public Operational groups is only done by administrators.
- Administrators will share and own items shared with Public Operational groups.
- Administrators will monitor and audit access to items shared with Public Operational groups.
- Customer name will use Public Operational groups for collecting mission specific items and geographic information and controlling access in a single group.

Sharing with Project Groups

Project groups provide a way for users to share and collaborate on project specific and/or authoritative items and geographic information in the organization.

The following rules and guidelines will be enforced for sharing items and geographic information with Project groups:

- Project groups cannot be made public until permission is given by an administrator, and follows the authoritative workflow above.
- Only the owner of a Project group can share items to it.
- Membership to a Project group is done by invitation only through the owner of the group.
- Administrators will monitor and audit access to items shared with Project groups.
- Project groups will be used for sharing project specific items and geographic information to users in the organization.

Guidelines for Security

Governing security in ArcGIS Online/Portal for ArcGIS includes rules and guidelines for configuring security settings for policies, sharing and searching, password policies, enterprise logins, sign in options, multifactor authentication, and trusted servers. This is a privilege reserved for the administrator role.

The following rules and guidelines will be enforced for ArcGIS Online/Portal for ArcGIS security:

- Access will only be allowed through HTTPS.
- Anonymous access will be allowed to the organization.
- Only standard SQL queries are allowed.
- Members will be allowed to edit biographical information and profile visibility.

Sharing and Searching

- Members are allowed to share outside the organization.
- Members can search for content outside the organization.

- Social media links are shown on item and group details page.

Password Policy

- Member passwords must meet the following requirements:
  - Password is at least X characters long.
  - Contains at least one letter.
  - Contains at least one upper case letter.
  - Contains at least one lower case letter.
  - Contains at least one number.
  - Contains at least one non-alphanumeric character.
  - Password will expire after X days.
  - Members may not reuse their last X passwords.

Enterprise Logins

User passwords will be enforced using an enterprise identity store accessed via Security Assentation Markup Language. The SAML provider will be ADFS.

Multifactor Authentication

- Users are allowed to set up multifactor authentication.
- The following customer name administrators are allowed to enable multifactor authentication for users.

Trusted Servers

- The following servers are trusted. Credentials can be sent to these servers when working with services secured with web-tier authentication.
  - Server A
  - Server B
  - Server C