



Promoting Your Location Platform

A Change Management Kit



www.esri.com/ChangeKit
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What is the Change Management Kit?

The launch of your location platform is an exciting change for your organization. As you introduce members of your organization to your location platform, it is important to properly guide individuals and teams in a way that is easy, fun, valuable, and rewarding. Exciting and inspiring new users to adopt the platform will help your organization realize the value that location information can bring.

The Change Management Kit is a collection of activities and promotional tools that can be used to engage and excite members of your organization during the implementation of your location platform. It also can be used to ease the process of change through activities that provide participants with the opportunity to become more familiar with your location platform. The Change Management Kit includes:

Lunch and Learn

The Lunch and Learn provides activities and resources to excite and educate your organization about the location platform through the use of ArcGIS Online. This section contains two 30-to-60-minute training sessions that can be used to kick-start your organization's use of ArcGIS Online. The sessions include:

- Creating a web map
- Sharing a web map

Story Mapping

The Story Mapping activity provides resources and suggestions on how to introduce users to your platform through Esri's story mapping capabilities.

Data, Data Everywhere

The Data, Data Everywhere activity gets members of your organization thinking about location data in your organization and how it can be used in conjunction with your location platform.

Posters

Posters included in this kit can be used to promote the launch of your location platform and to keep people informed of the status of your launch and upcoming activities. You can download these posters [here](#).

Graphics

Map pin graphics included in this kit can be used to brand the launch of your location platform by adding them to email signatures, headers, or footers in documents. You can download these graphics [here](#).

LUNCH & LEARN



Lunch and Learn

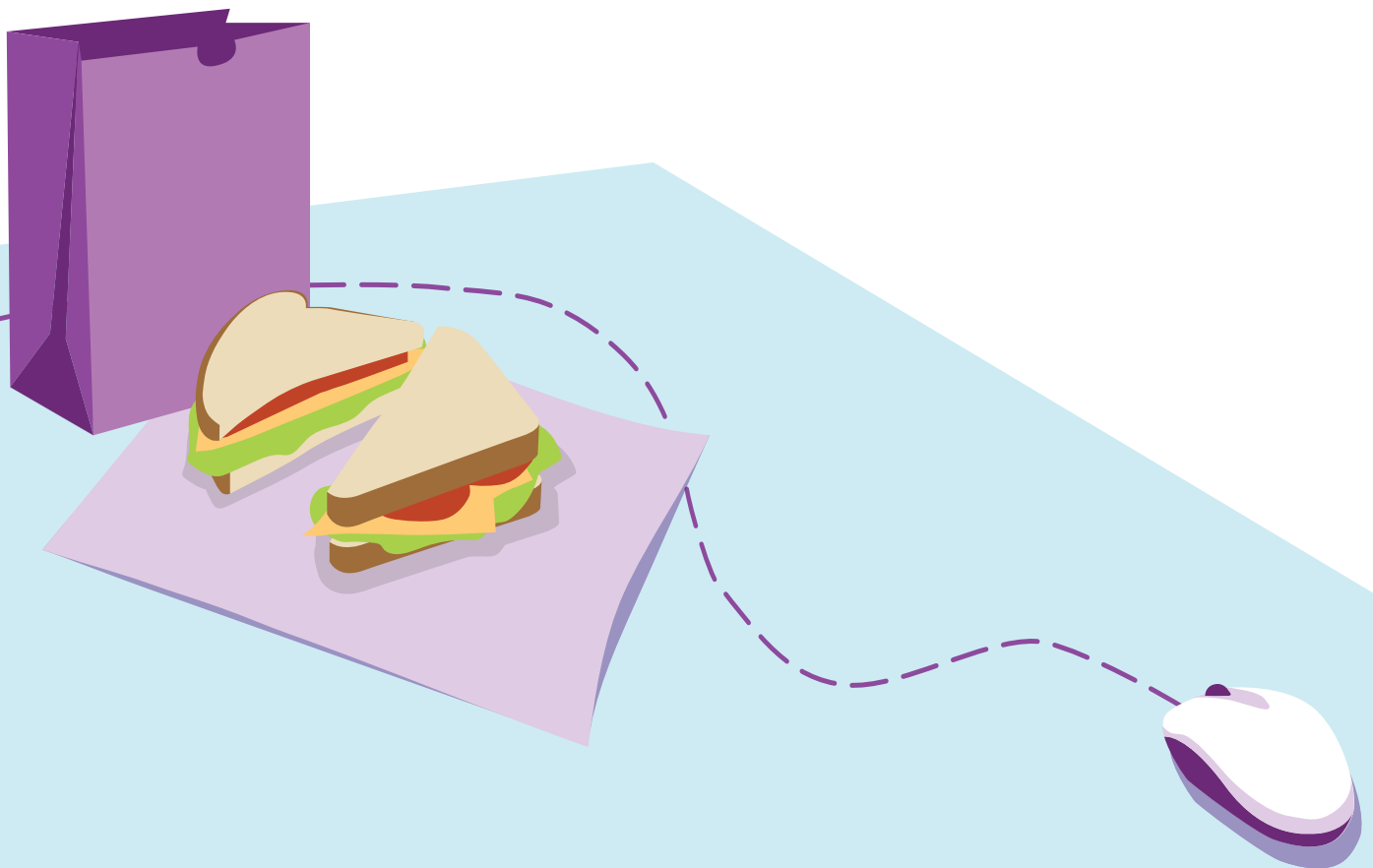
The Lunch and Learn includes two training sessions focused on getting started with ArcGIS Online. Each session is designed with approximately 30 to 60 minutes of content and resources. These sessions contain an instructor guide, a slide deck, and data templates that will assist in familiarizing new users with ArcGIS Online. These sessions and content are guidelines. You can customize the format and materials to accommodate your organization's training needs.

Session I: Creating a web map

In this session, attendees will learn how to find, add, and configure content that will be used to create a web map.

Session II: Sharing a web map

In this session, attendees will learn how to share a previously created map, use the shared map to create their own web application, and observe how changes in the map are reflected in the web application.



Why should you do this activity?

- To get members of the team familiarized with ArcGIS Online.
- To spark ideas about maps that the team can create and share.
- To serve as an ice breaker activity to get people excited and talking about the location platform.

Who should do this activity?

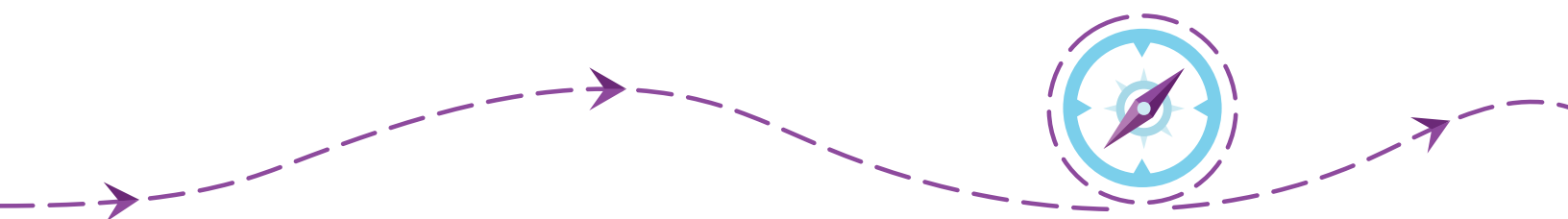
- Members of your organization who will be using the location platform.

When should you do this activity?

- When members of your team are eager and ready to familiarize themselves with ArcGIS Online.

What are the results?

- Introduces members of your organization to mapping concepts.
- Enables members of your organization to create and share a basic web map.
- Allows members of your organization to use your location platform early on.



Instructor icons used in this kit



Follow-along demonstration

The participants follow along on their own computers as the instructor explains and executes the procedure simultaneously.



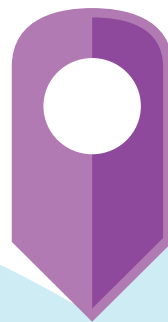
Instructor-led demonstration

The instructor demonstrates the activity on their computer while learners watch and listen.



Note

Notes point out additional information, exceptions, or special circumstances that apply to a particular topic or procedure.



1

Session I: Creating a web map

Before presenting these training materials, you need to complete a few steps to ensure that you and your participants can access the necessary resources:

Confirm access

Confirm that all training participants can access your ArcGIS Online organization's site. If necessary, contact the site administrator to confirm the following:

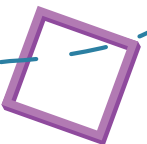
- All training participants have been invited to the organization.
- All training participants have signed in to the organization.
- All training participants are assigned to a User role or a custom role with privileges equivalent to a User.

Set expectations

Contact training participants to set their expectations and ensure that they are prepared to participate. You can use this [email template](#) to get you started.

Technology requirements

A laptop or desktop computer with Internet connection is required in order for attendees to participate. If this is not available for all attendees, the instructor can group participants or convert all follow-along demonstrations into instructor-led demonstrations.



Prepare the session data

To introduce ArcGIS Online, you can show an example of its functionality. **Lunch and Learn Map 1** is an ArcGIS Online web map that contains generic points, lines, and polygons. You can **save this map** to your content and change the **style, pop-ups**, and name to fit your organization.



Note: You need to be signed in to an ArcGIS Online organization in order to save a copy of the map.

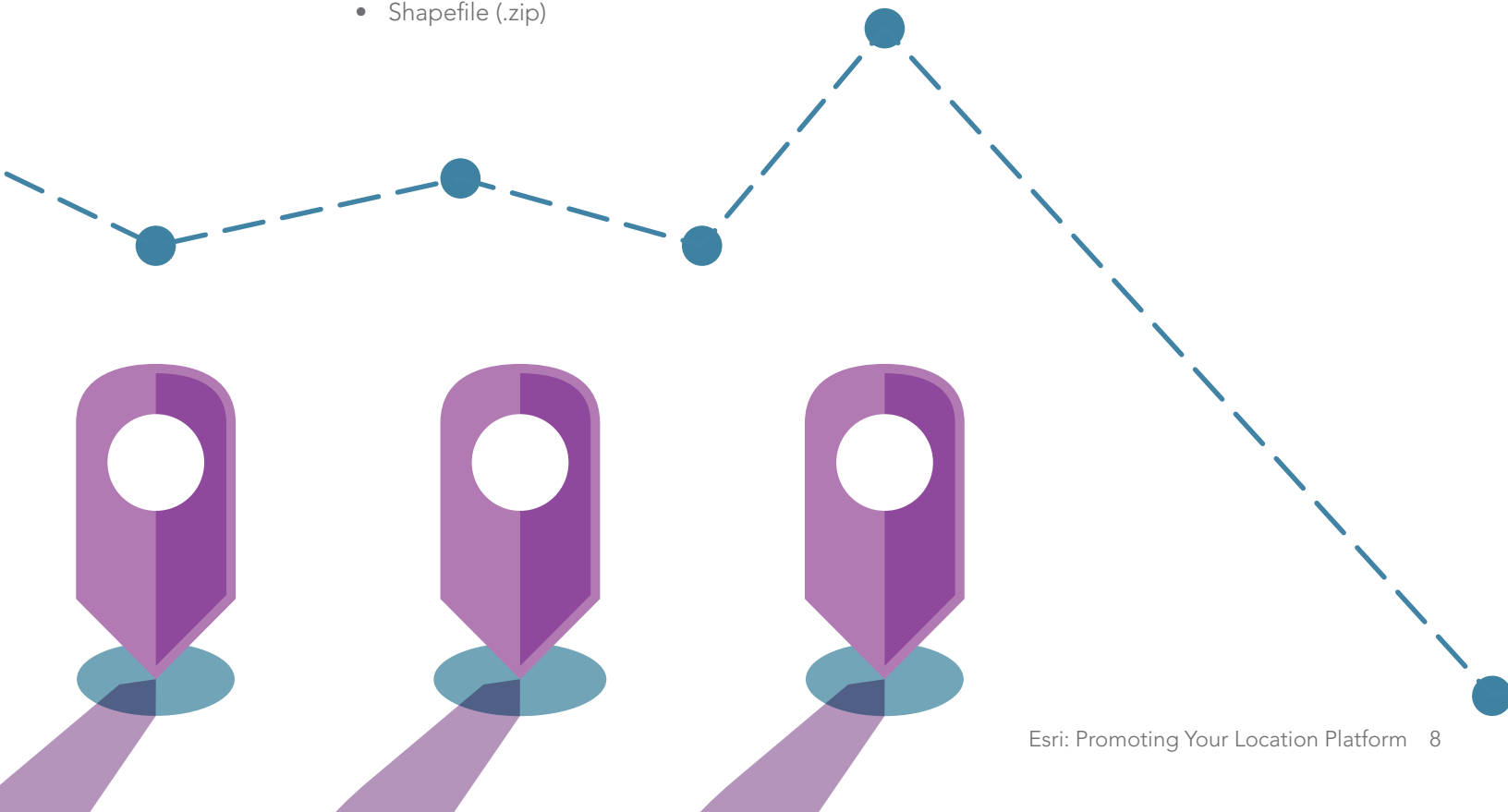
To demonstrate the ease of adding data to a web map, use a small dataset (to reduce wait time and credit usage) that includes location information (e.g., addresses). Included is a generic CSV file (**AddressesNorth.csv**) of addresses that you can customize and use for your demonstration.



Note: Depending on what application you use to open a CSV file, leading zeros may not appear. However, the points will accurately display on the map.

If you wish to use your own dataset, we suggest using a data type your participants are familiar with and commonly use. Here are some examples:

- Comma-separated values (CSV) file (.csv)
- GeoRSS web feed (URL)
- Text file (.txt)
- Shapefile (.zip)



Session I: Instruction

The following outline provides guidelines for presenting Session I: Creating a web map. Please review this outline and customize it according to your participants' training needs. A presentation for this session can be found [here](#).



Introduction

Introduce ArcGIS Online: This training session will introduce everyone to ArcGIS Online, a cloud-based platform that enables your organization to add location to data and share it. To learn more about ArcGIS and its capabilities, play the [ArcGIS Online overview video](#).

Transition to today's topic: This video illustrates many different uses of ArcGIS Online, but today you will work on making web maps. Open [Lunch and Learn Map 1](#) to illustrate what a web map is and some of its functionality. Potential items to illustrate and explain include the following:

- **ArcGIS web map definition:** An ArcGIS web map, like any other map, is made up of layers. There is a basemap layer and data layers. A basemap provides geographic context for your data layers. Data layers can be used for queries and editing or for showing information. The map itself can be created and stored on the web. This means that it can be accessed from any device (web browser, mobile device, app, or desktop map viewer). A slide has been provided to illustrate this information.
- **Map appearance:** As you add or review data, you may want to change the map's appearance to make it easier to understand. In ArcGIS Online, you can change the symbols, transparency, and basemaps in order to create a custom look and feel to the map that meets your needs.
- **Pop-ups:** When you click an item or feature in the map, a pop-up window will appear with information about the data. You can configure this pop-up window to show the information you think is valuable, and you can add graphics and website links to provide further information for the map user to review.

Transition to first step: Each participant will get a chance to create a map using data that you provide.

Signing in to ArcGIS Online



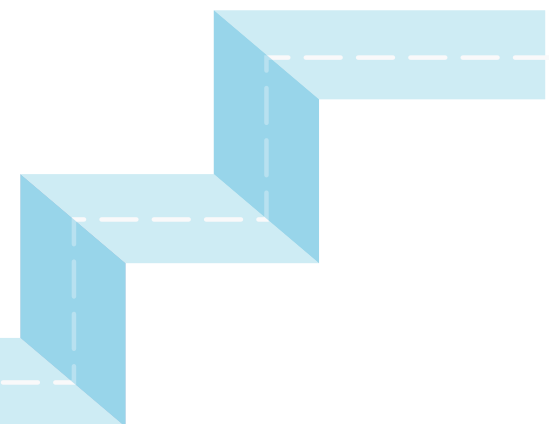
Demonstrate steps to sign in to ArcGIS Online: The first step to create a web map is signing in to the ArcGIS Online organization. Demonstrate the following steps while the participants follow along on their own computer:

- In a web browser, type www.arcgis.com/home.
- Click Sign In.
- Type your user name and password and click Sign In.
- Confirm that everyone was able to successfully sign in to the organization.



Note: If some of the participants experience problems signing in to the organization, have them pair up with another participant who successfully signed in. This will save time and allow you to troubleshoot after the session.

Transition to adding content: Signing in to an ArcGIS Online organization allows users to create and share content with other organization members and discover and use content created by others.



Adding content



Introduce scenario: Explain that you have created some data (be specific about the type of data you have created, e.g., spreadsheet of customer locations). Other team members will need to review and analyze this information, so you have decided to add it to a map and share it with the organization. Demonstrate the following steps to add content to a web map:

- Show the participants the item you plan to add (e.g., open the CSV file in Microsoft Excel).
- If necessary, sign in to ArcGIS Online.
- In ArcGIS Online, click Map.
- In Map, click Add and choose Add Layer From File.
- In the Add Layer From File dialog box, browse to the item you want to add and click Import Layer.



Note: Depending on the type of item you added, you may need to locate the features by matching your item's location fields with the ArcGIS Online field names.

- If necessary, click Add Layer.
- Explain that the item has been successfully added to the web map as a layer of features. Now you plan to save and share the map with everyone in the organization.
- At the top of the map, click Save > Save As.
- In the Save Map dialog box, enter a title, tags, and summary, and then click Save Map.



Note: Participants will search for the map using key terms that match the title or tags you have entered.

- At the top of the map, click Share.
- In the Share dialog box, check the box next to your organization's name, and click Done.

Transition to finding content: Explain that, with a few clicks, you have taken data, added it to a map, and shared it with everyone in your organization.

Finding content



Introduce scenario: The data is ready for the participants to review and analyze; they just need to find it. Demonstrate the following steps to find and open a web map while participants follow along on their own computers:

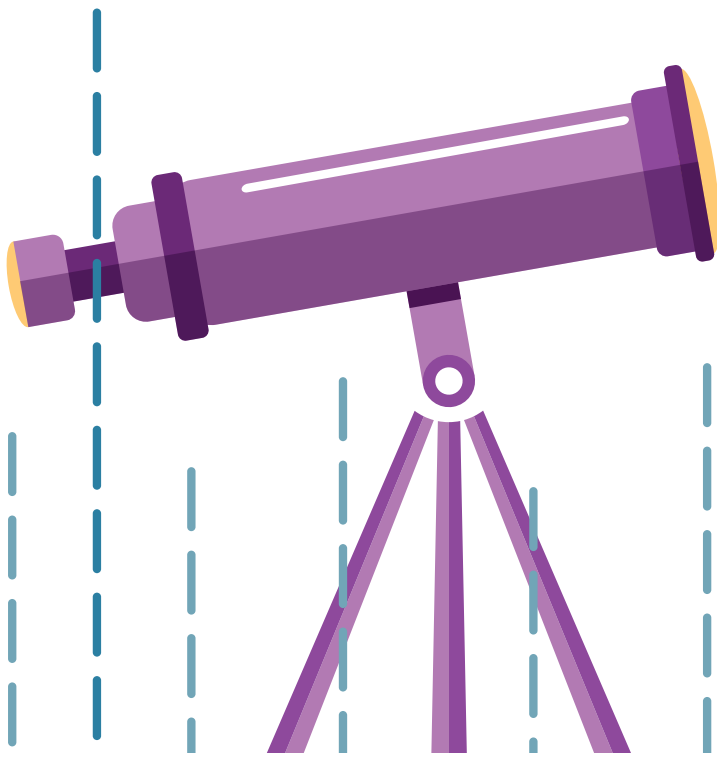
- In ArcGIS Online, navigate to the Home page.
- Point to the search field in the top right.
- Ask participants what to use for a search term (e.g., Lunch and Learn).
- Enter a search term in the search field and click Search All Content.



Note: Use a search term that matches the title or tags you entered when saving the map.

- Find the map you created.
- Explain that this search looked through only the items that have been shared to the organization. If you uncheck the option that says “Only search in <your organization>” the search would look through all public content on ArcGIS Online.
- Click the map thumbnail to open the map in the ArcGIS Online map viewer.

Transition to creating a web map: They found the web map you created. Because they all work for different teams or have different uses for this content, they will create a copy of this map and customize it to meet their needs.



Creating a web map

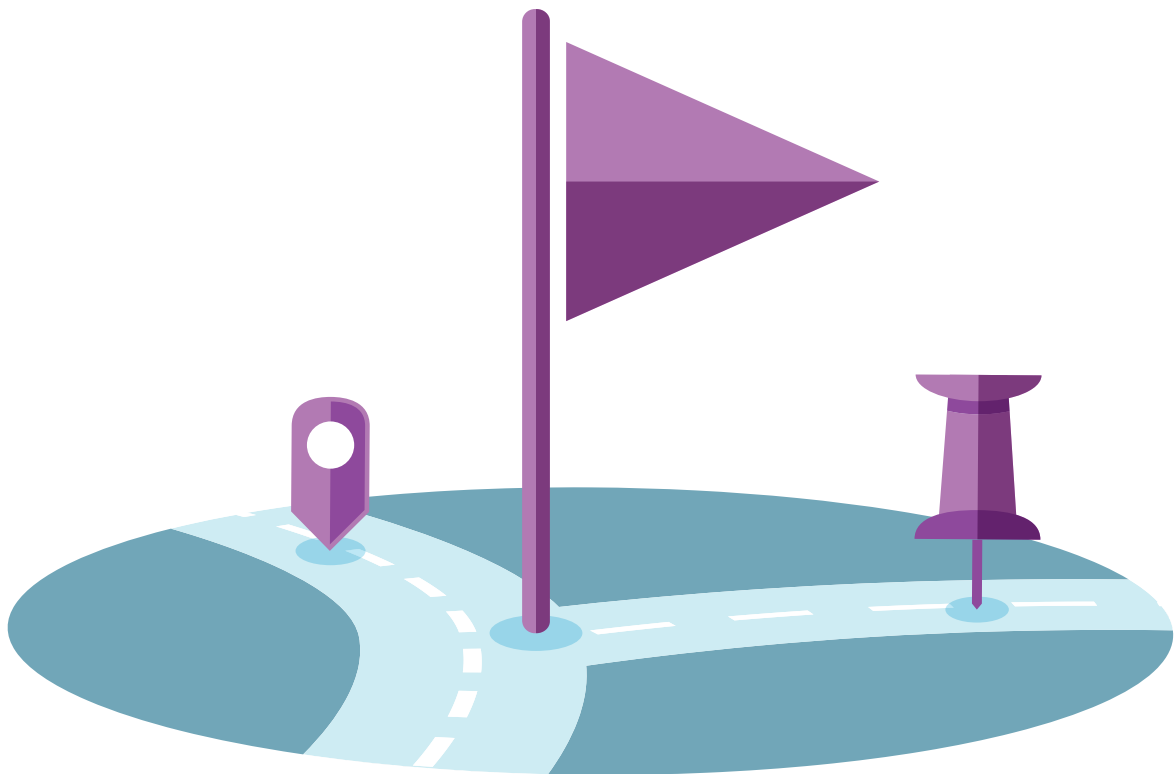


Introduce scenario: The participants will each take this map, save a copy to their content, and customize it to meet their needs. Demonstrate the following steps to create a web map while having participants follow along on their computers:

- In ArcGIS Online, at the top of the map, click Save > Save As.
- In the Save As dialog box, add ' _<initials>' to the title.
- Click Save Map.
- Explain that they have just created their own copy of the map (with their initials) and saved it to their content.
- At the top of the map, click Basemap, and choose one of the basemaps.
- Explain that basemaps provide geographic context to your map. The basemap you choose depends on the information you are illustrating.
- In the Details pane, under Contents, hover over the layer and click Change Style.
- Explain that the style of your data includes its symbols, transparency, and visibility range. The Change Style pane provides style choices based on the nature of your data. It uses the type of data you are using (e.g., points or lines), the attributes used to describe your data, and your basemap to provide options that can help you better represent your data.
- In the Change Style pane, choose the attribute you want to show and a drawing style.
- Click Done.
- Explain that some styles have additional options, such as color, line width, and transparency. If users are interested in style options, direct them to this [ArcGIS Online Help page](#) that provides the steps to use style options.

- Click one of the features to illustrate pop-up windows. Explain that you can configure these pop-up windows to change what and how the information is displayed. Depending on time and interest, you may want to demonstrate how to **configure a pop-up window**.
- Save the web map.

Conclude the session: In a few steps, the participants created a web map that can be customized and shared with others in the organization. This is just one example of how you can add location to your data using an ArcGIS Online organization. For a reminder of the steps completed in today's session, e-mail this **job aid** to your participants.



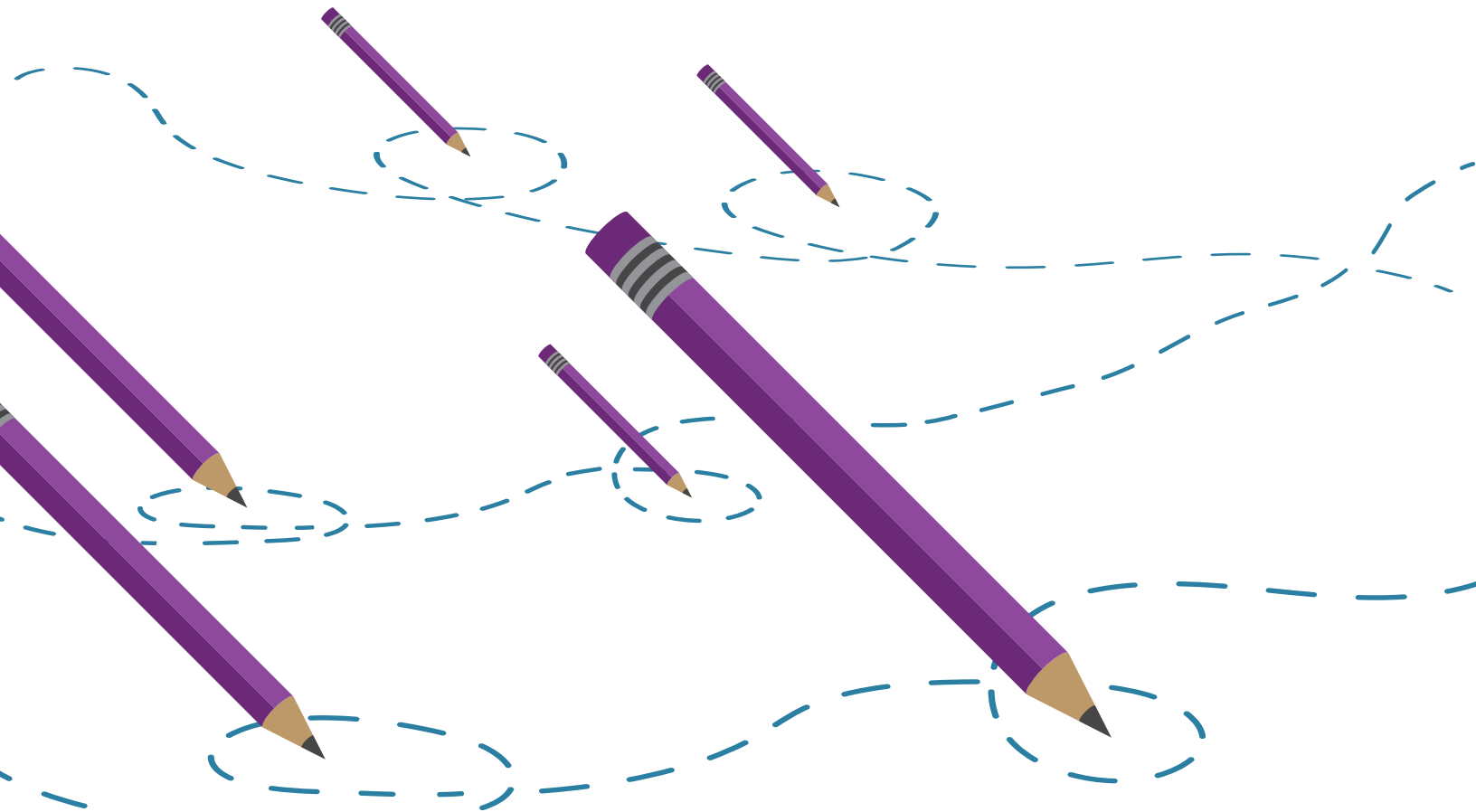
Additional resources

Courses

Esri provides a number of self-paced and instructor-led courses that you or your participants can take to learn more about the topics discussed in this session and other topics related to ArcGIS Online.

Help

The ArcGIS Online Help provides detailed descriptions of the functionality included with ArcGIS Online, along with videos and instructions that let you try it out.



2

Session II: Sharing a web map

Planning

Before presenting these training materials, you need to complete a few steps to ensure that you and your participants can access the necessary resources:

Confirm access

Confirm that all training participants can access your ArcGIS Online organization's site. If necessary, contact the site administrator to confirm the following:

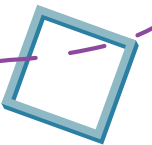
- All training participants have been invited to the organization.
- All training participants have signed in to the organization.
- All training participants are assigned to a User role or a custom role with privileges equivalent to a User.

Set expectations

Contact training participants to set their expectations and ensure that they are prepared to participate. You can use this [email template](#) to get you started.

Technology requirements

A laptop or desktop computer with Internet connection is required in order for attendees to participate. If this is not available for all attendees, the instructor can group participants or convert all follow-along demonstrations into instructor-led demonstrations.



Prepare the session data

To introduce Session II: Sharing a web map, you may want to review the map you created in Session I: Creating a web map. If this map has already been deleted, create a new copy of the map following the steps in Session I: Creating a web map.

Create a group: Create a group that will be used in session II. To create a group, complete the following steps or refer to [this ArcGIS Online Help page](#).

- Sign in to ArcGIS Online.
- Click Groups.
- Click Create A Group.
- Enter a Name, Summary, Description, and Tags for your group.
- Set the status to Organization.
- Click Save.
- Click Invite Users.
- Invite all training participants to the group.
 - Search for a name.
 - Under Users, click the name to add it to the Invitation List.
- Click Send Invitation.



Note: When participants sign in to the ArcGIS Online organization, they will need to accept the group invitation.

For the Sharing content demonstration, you will need to share a web map. Create a new web map using your own data or this CSV file ([AddressesSouth.csv](#)).



Note: Depending on what application you use to open a CSV file, leading zeros may not appear. However, the points will accurately display on the map.

Include a summary and description of the map's [details page](#). Several of the web applications will display this information if it has been entered in the map's details page.

2

Instruction

The following outline provides one way you can present Session II: Sharing a web map. Please review this outline and customize it according to your participants' training needs. A presentation for this session can be found [here](#).



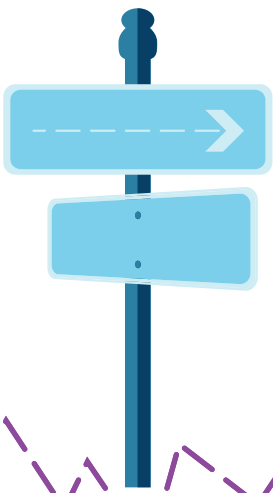
Introduction

Transition from Session I: Creating a web map to today's session (Session II):

Open the map you created in session I. Explain:

- In session I, you were introduced to ArcGIS Online and went through the simple process of creating a web map.
- Because a web map is created and stored on the web, anyone you choose can access it, from any location and on any device, promoting collaboration across the entire organization.
- To illustrate these capabilities, you will use this training session to show participants how to share web maps with others and use them in a web application.

Transition into the first step: The first step for map collaboration is to share the map with the appropriate people or teams.



Signing in to ArcGIS Online



Demonstrate steps to sign in to ArcGIS Online: To share the map, you will need to sign in to your ArcGIS Online organization. To ensure that the map has been successfully shared, the training participants will also sign in to the organization. Demonstrate the following steps to sign in to ArcGIS Online while the participants follow along on their own computer:

- In a web browser, type www.arcgis.com/home.
- Click Sign In.
- Type your user name and password and click Sign In.
- Confirm that everyone was able to successfully sign in to the organization.



Note: If some of the participants experience problems signing in to the organization, have them pair up with another participant who successfully signed in. This will save time and allow you to troubleshoot after the session.

Transition into sharing content: Now that you have signed in, you will find the map and share it.



Sharing content



Introduce scenario: You have created a map to help you and your team visualize the data (be specific about the type of data you plan to use—e.g., spreadsheet of customer locations). Because other team members will need to review and analyze this content, you have decided to share it with the group you have created for the team. This will allow team members to quickly find the content for this project. Demonstrate the following steps to share your map with a group:

- In ArcGIS Online, click My Content.
- Check the map you want to share.
- Click Share.

Explain that there are several sharing options available, each related to the level of access you want to assign to your content. There are four levels, each with increasing accessibility to the content: private, group, organization, and public. Use the slide to explain these permissions levels:

Private: Accessible only to the content owner and administrator(s) of the organization. This is the default setting.

Group: Accessible to group members, even if those members do not belong to their ArcGIS Online organization. Using groups allows your members to easily find and collaborate with content specific to their team. It also secures sensitive content by allowing only a group of people you choose to access it.

Organization: Accessible to any member of the organization.

Public: Accessible to anyone. Some administrators disable this option for the organization members.



Note: You can choose a combination of levels (e.g., organization and group) to ensure that the content is easily accessible for those who need it most, but also accessible to the entire organization.

- Check the group you created, and click OK.

Confirm that the map is shared



The map is now shared to the group. Sharing it with the group provides team members with a faster way to find the content than searching the entire organization. It also ensures that only the members of this group will be able to access this map. Demonstrate the following steps to find the map using a group while the participants follow along on their own computer:

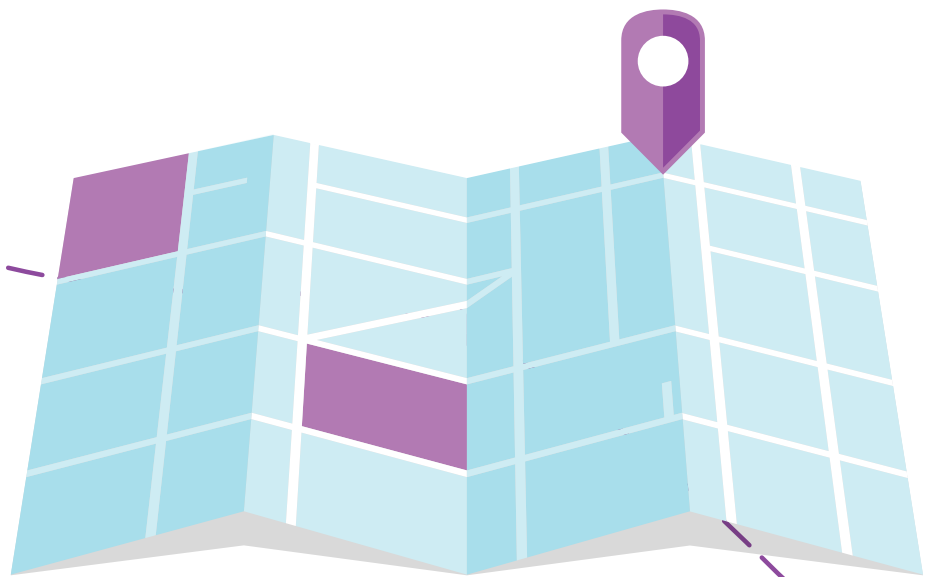
- In ArcGIS Online, click Groups.
- Open the group you created.



Note: If participants do not see your group listed, they need to click Invitations, find the group you created, and choose Join this group.

- Find the map.
- Click the map thumbnail to open the map in the ArcGIS Online map viewer.

Transition to configuring a web application: ArcGIS Online provides easy ways for us to create and share maps. You can use a variety of applications to open and work with these maps, including web and mobile applications. Use the slide to explain.



Creating a web app



Introduce web apps: ArcGIS Online provides configurable apps that allow you to create a web application based on your audience or workflow without any experience programming.

Introduce scenario: You have shared your map with other team members to use and analyze. One of your team member's managers would also like to review the map and a summary of your analysis. You have decided to present this information using a web app that focuses on a more simplified view of the map and summary of what's being illustrated.

- At the top of the map, click Share.
- Click Create a Web App.
- Review the configurable apps to find application(s) that provide a simple view of the map and an area for a map description or summary.
- Click to select a configurable app, then click Preview to preview web app you like.
- Choose one of the configurable apps.
- In the configurable app thumbnail panel, click Create App.
- In the Create a New Web App dialog box, rename the web application and then click Done.
- Explain that when the web app publishes, it opens with the Configure Web App page where you can change the style and information shown on the application.
- Choose the style and information you want your app to display.

Note: The available options for you to edit depend on the configurable app you published.



- Click Save and Close.
- In the item details page, click the application thumbnail to open it.

Transition to editing content: Explain that each participant is looking at the same map (in different applications), which means they will see any change you make to the map.

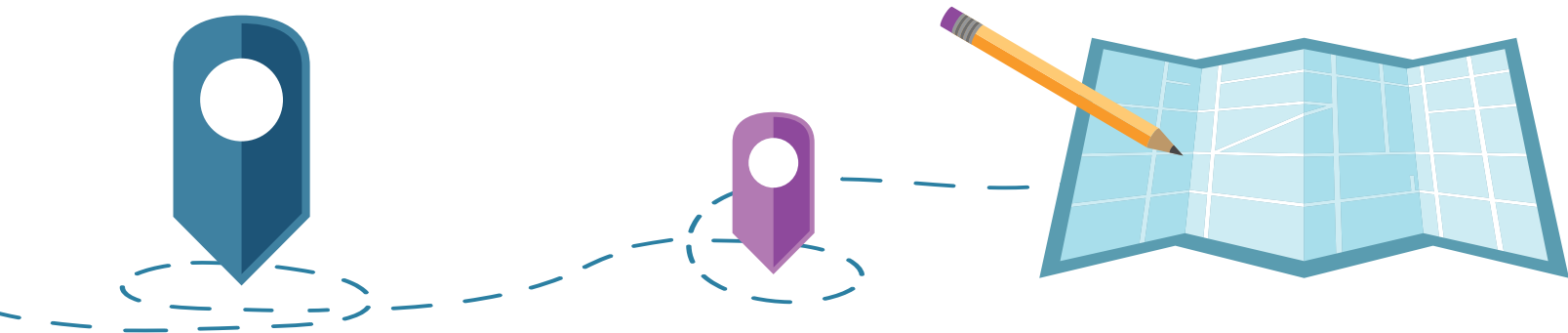
Editing content



Introduce scenario: You have just been told about a new development that needs to be included in the map. Because all your team members are using the same map, the change you make will be reflected on the apps they have created, ensuring that they are using the most up-to-date content. Demonstrate the following steps to edit content:

- In ArcGIS Online, navigate to My Content.
- Open the map.
- In the Details pane, under Contents, hover over the layer and click the More Options button, then choose Enable Editing.
- Click Edit.
- In the Add Features pane, click the feature you want to add.
- Click or draw the new feature in your map to add it. Press the Ctrl key to enable snapping.
- Enter information into the available fields.
- Save the map.
- Ask participants whether they see the change on the map they are viewing in their web application (they may need to refresh).

Conclude the session: In a few steps, the participants accessed the map you created, created their own web applications using the map, and saw how changes in the map are pervasive in the items referencing it. This is just one example of how you can use ArcGIS Online groups, maps, and applications to collaborate across your organization.



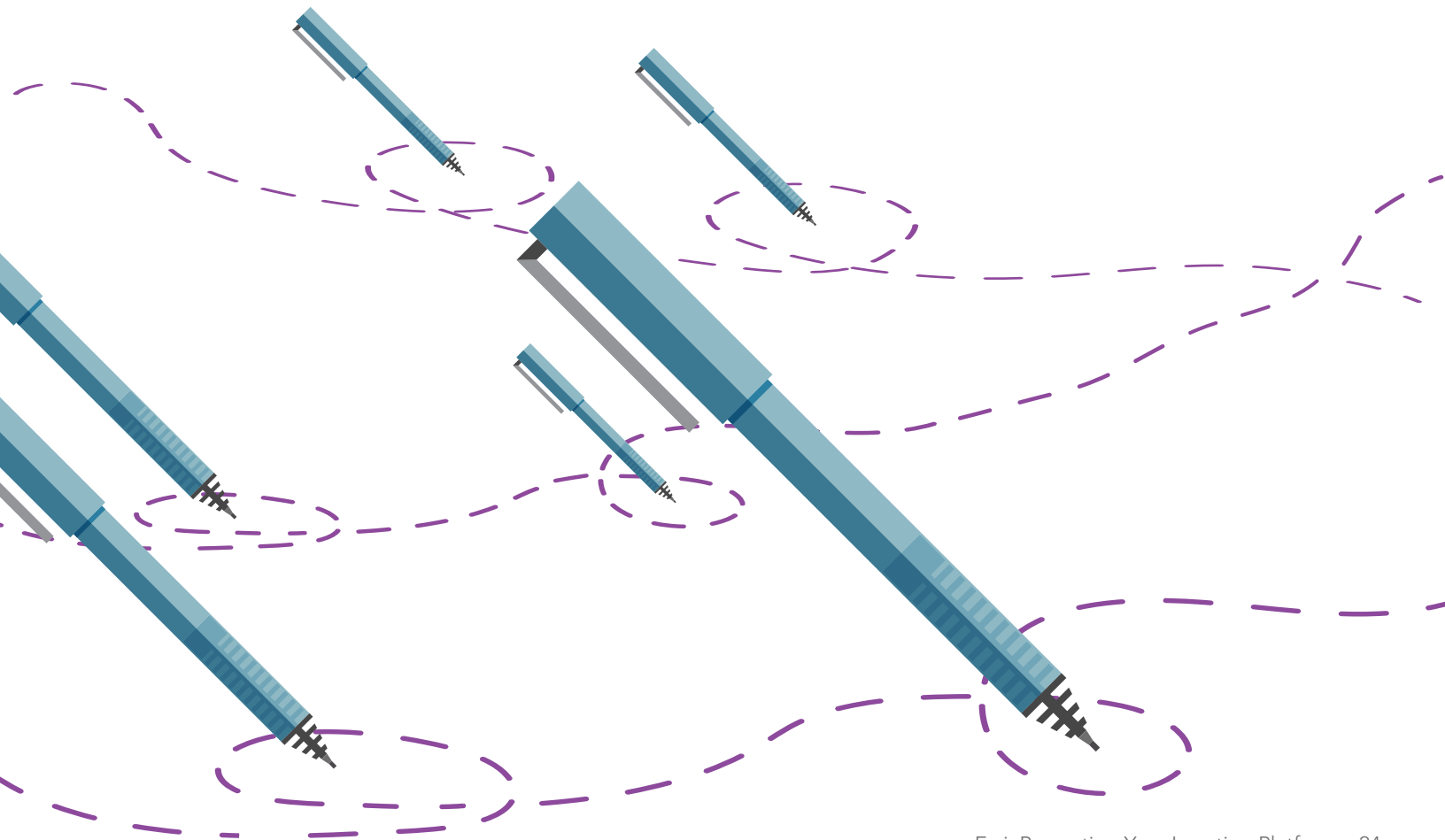
Additional resources

Courses

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Help

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STORY MAPPING



Story Maps Activity

Story maps are a great way to start using maps. Your team members may be eager to start working with the new technology. Their enthusiasm can best be directed to projects that illuminate different aspects of the location platform before you complete steps in the guide. You can think of these colleagues as early adopters of your location platform.



Why should you do this activity?

- You may need to show and share some quick results.
- Certain people on the launch team are eager to get their hands on the technology.

Who should do this activity?

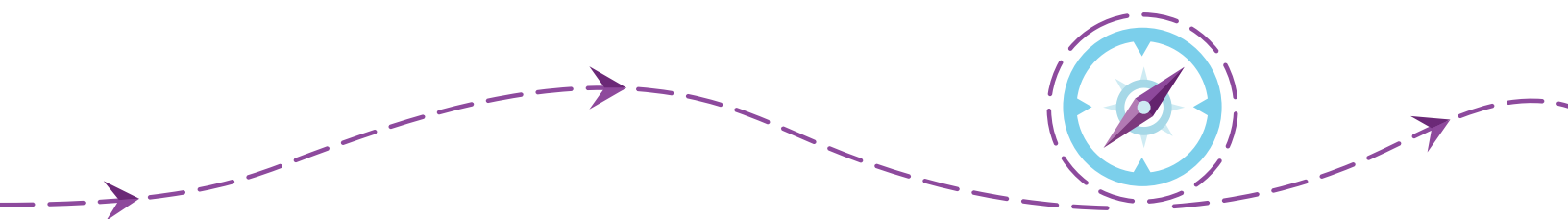
- Early adopters of your location platform.
- Moderately technical people who like trying new things.
- People who want to share what they have learned.

When should you do this activity?

- When you need to show quick results.
- When more technical members of the team are eager to work with your location platform.

What are the results?

- Real products or deliverables that can be used in your organization.
- A way to focus the team on the purpose and objectives of implementing a location platform.



Getting started

First, ask your early adopters to explore story maps created by other organizations. Here are examples:

- [Mapping Esri's World](#)
- [Es Deepwater Horizon Response](#)
- [Tramway, une École française](#)
- [Capital Improvement Projects \(CIP\)](#)
- [Royal HaskoningDHV](#)
- [Maryland Department of Planning](#)
- [Explore the Smithsonian Gardens](#)

Next, encourage your early adopters to think about the story they want to tell. Asking them location-based questions such as the following may help spark ideas:

- Where are place-based projects that your organization is working on or has recently completed?
- Where are your best customers located?
- Where are the businesses that offer discounts to members of your organization?
- Where are your remote offices or organizational buildings?

Creating a story map

To create a simple story map, use the [Four-Step Process to Make a Simple Story Map](#)

Early adopters also have access to many apps to help them tell their story. Check out [What Kind of Story Do You Want to Tell?](#)

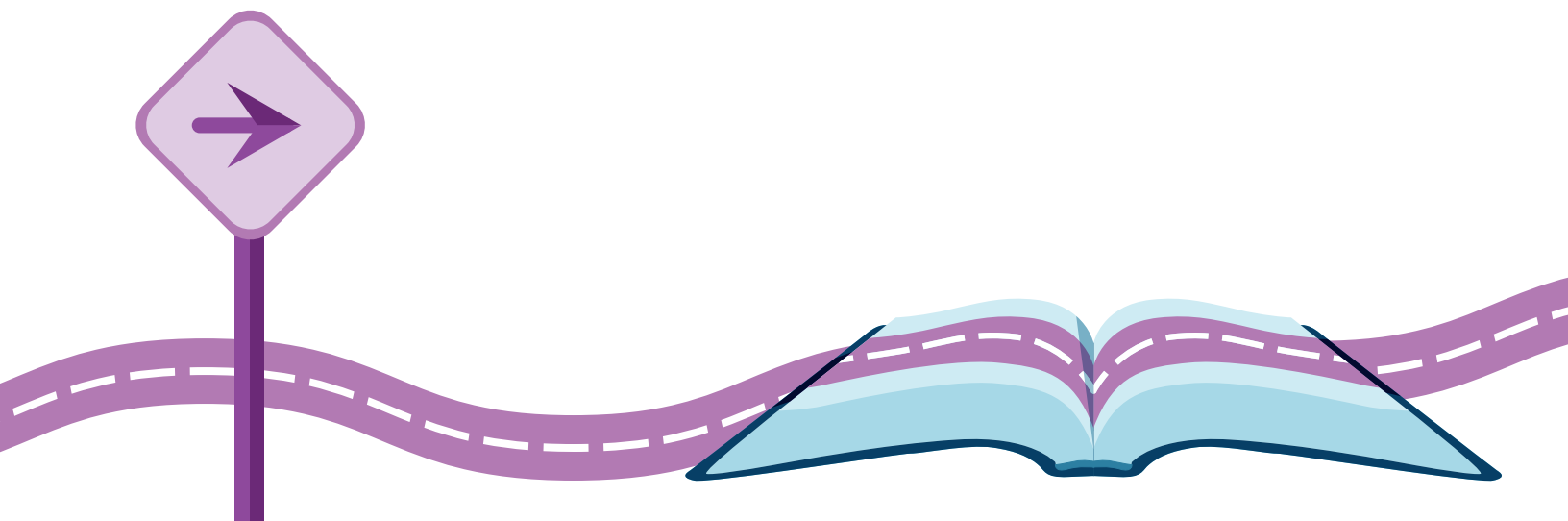
Once your early adopters start creating story maps, you can motivate them further to participate in projects that will use their new skills.

Promoting story maps

Once you have a few story maps to show, you can think about how to use them for promoting the use of maps in your organization. The following are some ways you can promote story maps:

- Offer training sessions that show how to create story maps based on the work of the early adopters.
- Create a gallery of story maps that can be shared within the organization.
- Put story maps to work by making them available to your customers.
- Sponsor a story map contest.

These activities are a great way to get members of your organization further engaged, excited, and involved with the location platform.



DATA, DATA EVERYWHERE

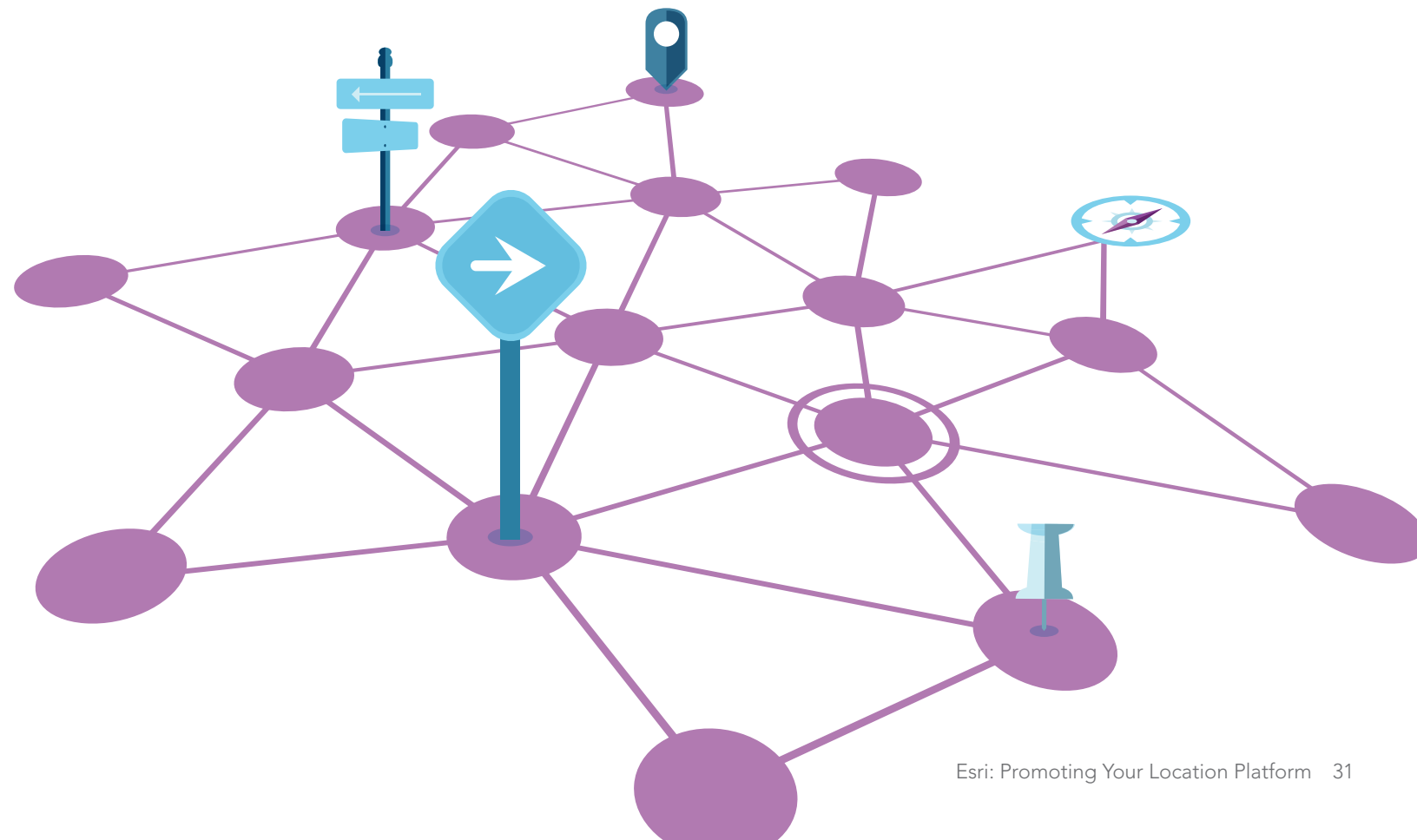


Data, Data Everywhere Activity

Location data is everywhere in your organization. You just need to take advantage of it. Your best first step is to make an ad-hoc inventory of datasets that include some sort of location information, such as an address, ZIP Code, city, or telephone number.

At the beginning of the launch guide, the team will meet to take on some of the initial tasks associated with launching a location platform. Team members might get stuck or might not know how to identify workflows that can be enhanced by location information.

Figuring out what location information is available in your organization can help spark ideas about how to use your new location platform and how to incorporate location information into different workflows.



Why should you do this activity?

- Spark ideas among members of your team.
- Get members of the team to think about where location data is present in the organization in order to optimize its use in the launch of the location platform.
- To serve as an ice breaker activity to get people talking and working as a team.

Who should do this activity?

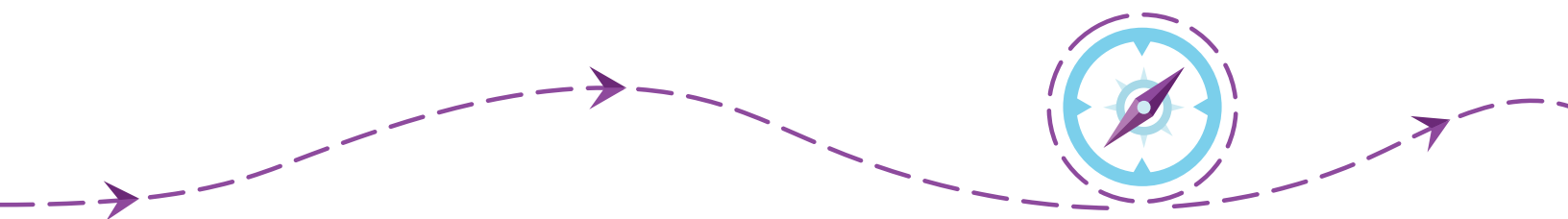
- Members of the team.

When should you do this activity?

- During the location value assessment—if the team is unsure about how to determine which job roles have workflows that could benefit from location information.

What are the results?

- Gain a better understanding of and consensus on data collaboration needs in the organization and across business areas.
- Determine who owns and uses different types of data.
- Focus the team on the purpose and objectives of implementing a location platform.



Preparation

To prepare for the activity, identify members or groups in your organization (departments, project teams, individuals) who use location data (addresses, demographics, street data, zoning, etc.).

Activity

Conduct a brainstorming session in which you facilitate the following:

- Explain that the purpose of the activity is to get members of the team to start thinking about where location data is present in your organization so they can use this information more effectively with their location platform.
- Identify types of location data used by each group or member of the team (addresses, demographics, street data, zoning, etc.).
- Assign a name to the data (e.g., customer data).



Note: It is not important to know how the data is stored, or the name of the database, or anything specific about the dataset. Just think about what that group does and whether or not they need location information to do it (e.g., the operations department tracks energy consumption at each of the remote offices).

- Capture and organize this information by group or individual. Ideas for ways in which you may accomplish this can be found [here](#). You may choose to organize the information using one of the following organizational structures:
 - Whiteboard data activity
 - Organization chart data activity
 - Spreadsheet data activity
- Take photos of the work in progress or make a poster or diagrams of the result.
- Revisit this work whenever the team gets stuck or needs to identify data owners or data needs.

Conclusion

By the end of the Data, Data Everywhere activity, your organization will have identified real datasets based on what the team knows about the organization's location data. This activity may also spark new ideas about how to use your organization's location information in new ways.

