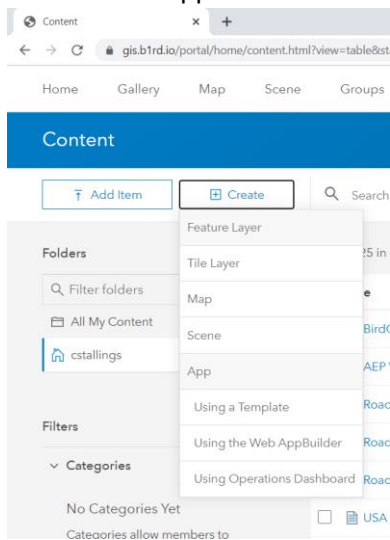


# ESRI Portal Web map Setup for BirdOne Fly

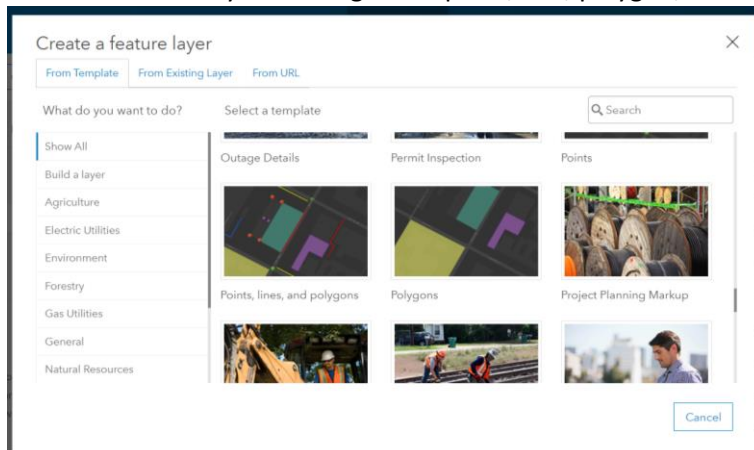
There are several ways to load data into your portal to create a web map. This document will show you how to load data in a web map ready for distribution using 3 main methods. These include creating a web map from the portal, uploading an existing Feature Layer, and syncing from ArcGIS Pro.

## Create a new web map from the Portal

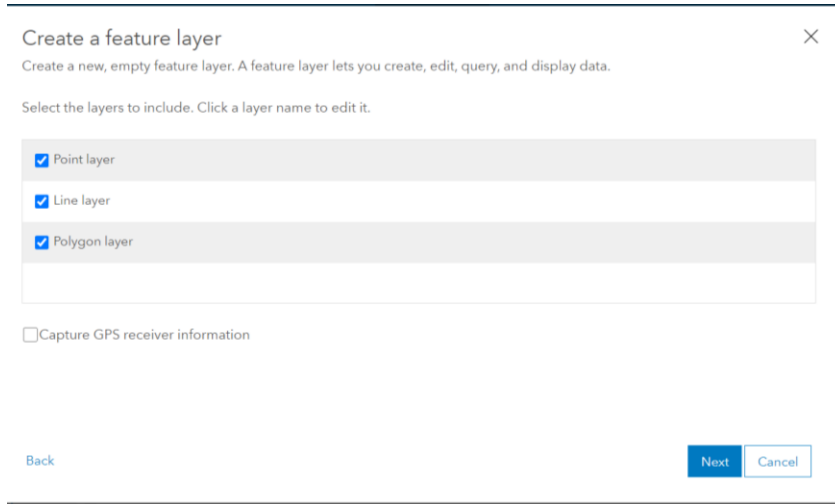
1. To create a web map, you need to first create a feature layer. To do so, go to content and select create in the upper left hand of the screen. From there select “Feature Layer”



2. This will bring up the create feature layer widget. In this widget, there are options to create a feature layer from templates, existing layers, and a URL. A template can be select to create a new feature layer based on an existing feature layer schema. Additionally, there are options to create a feature layer with a generic point, line, polygon, or all three.



3. Select the desired template and follow the instructions. When you are done, select Done to create the layer.



Create a feature layer ✕

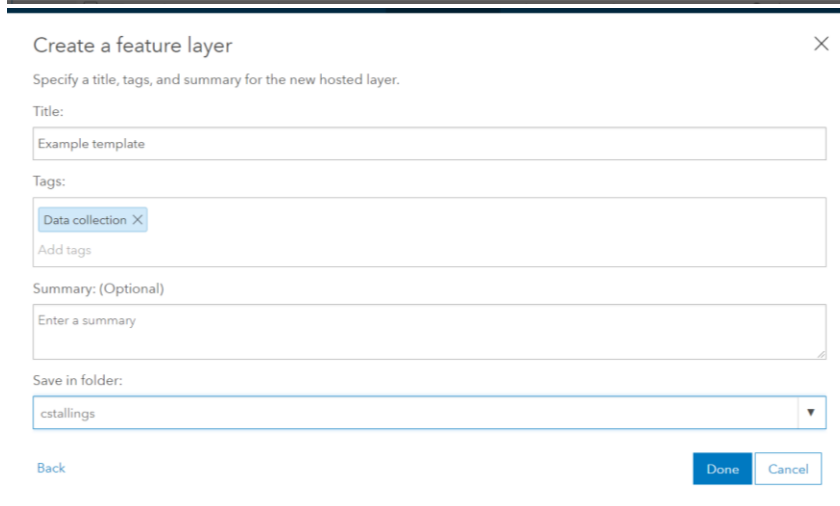
Create a new, empty feature layer. A feature layer lets you create, edit, query, and display data.

Select the layers to include. Click a layer name to edit it.

- Point layer
- Line layer
- Polygon layer

Capture GPS receiver information

Back Next Cancel



Create a feature layer ✕

Specify a title, tags, and summary for the new hosted layer.

Title:

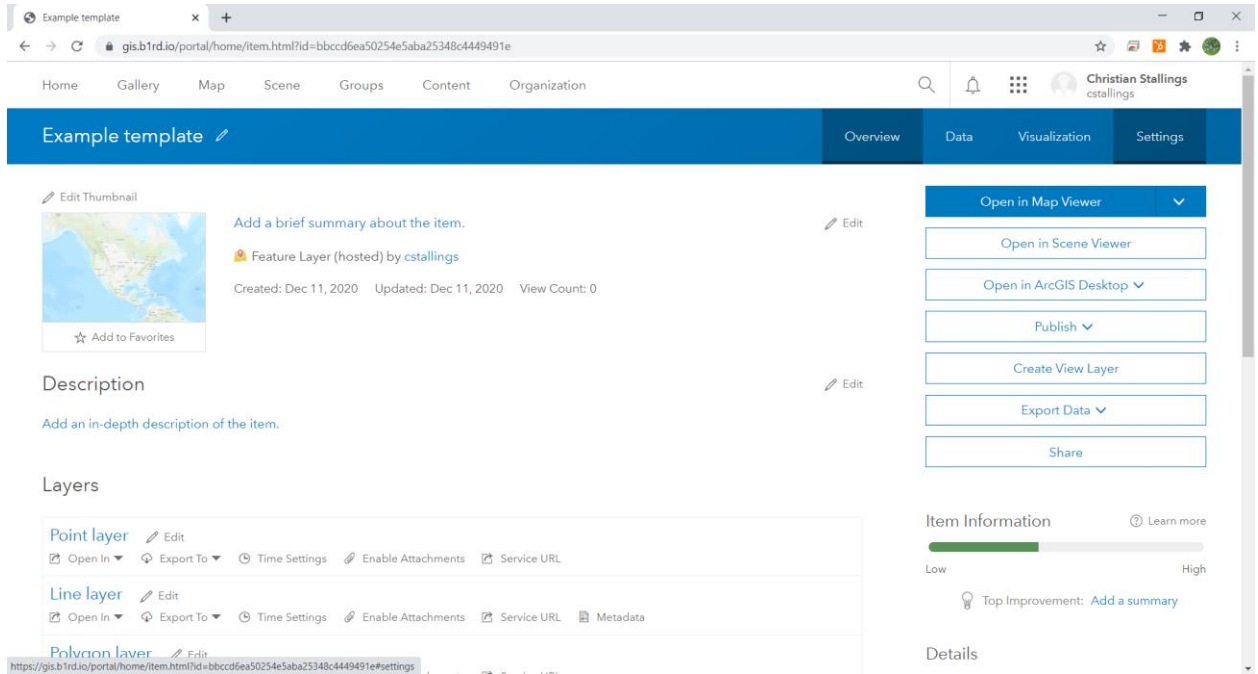
Tags:  
  
Add tags

Summary: (Optional)

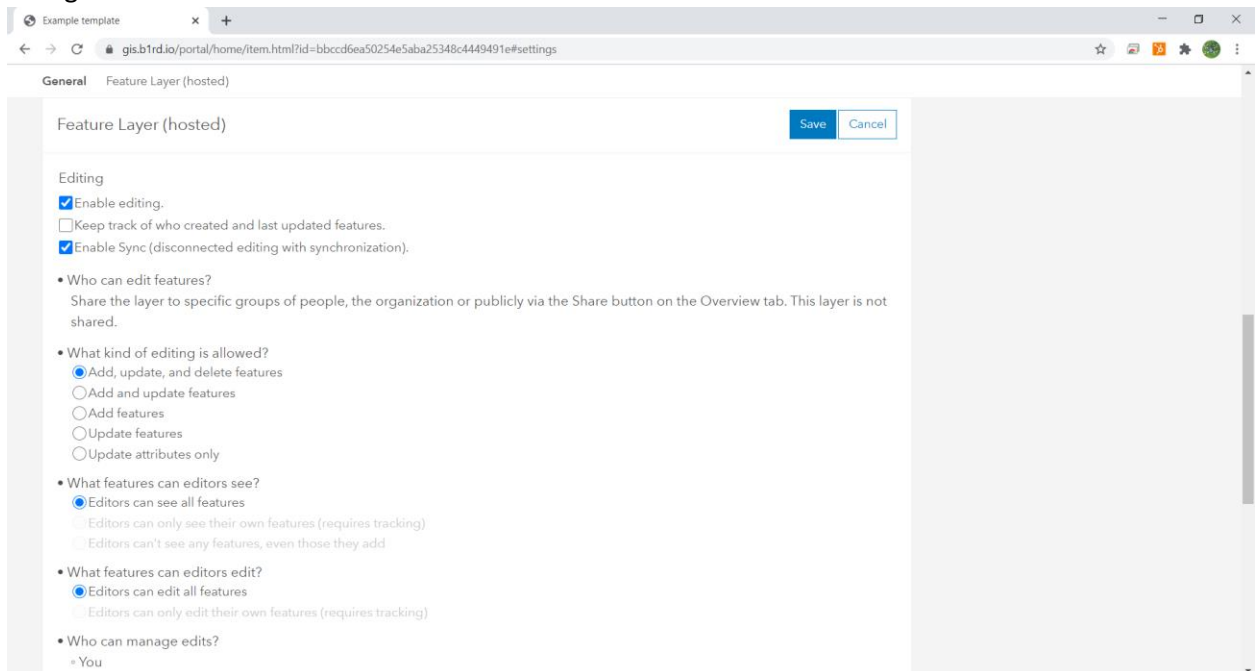
Save in folder:

Back Done Cancel

4. Next, we will set up our feature layer for offline use. To do so, in the feature layer page select the settings to tab on the upper right.



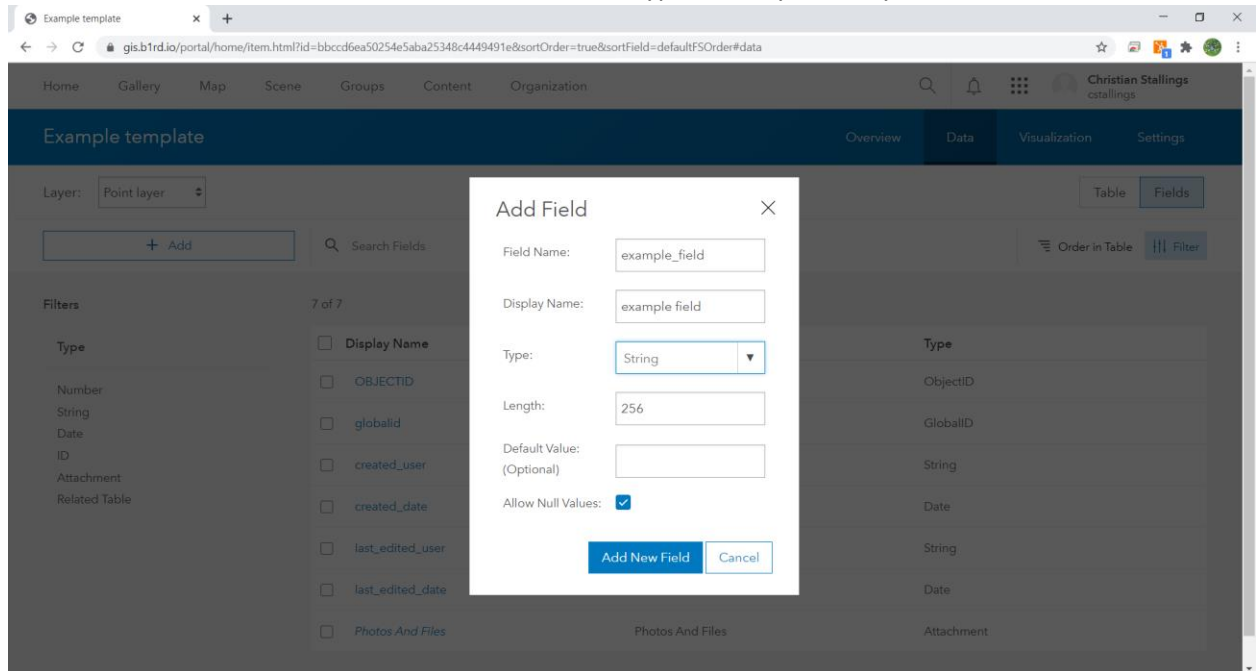
5. Make sure that Editing is set to Enable editing and Enable Sync. These are required to edit data in the field. You can optionally track edits from editors if you like however this will make your data a bit larger and slower. When you have your settings the way you want, hit save to keep changes



6. Back on the main overview tab for the hosted feature layer, we will need to enable attachments to add images to the features. Depending on the version of the portal you are using you will either see the enable attachments listed on each layer under the layers section in the overview

or you will have to select each layer to enable attachments. Either way, make sure enable attachments are on for each layer you wish to associate images with.

7. Next under the Data tab, we can customize our database for our workflow. In the Data tab, select Fields. This is where we will customize our attribute table for our layers. In the upper left corner, we can select the layer we want to edit. Underneath that we can hit add to create new fields in the attribute table. We can choose the data type and any aliases you would rather use.



8. Once we have created your field we can further modify the way it will function. For integers, we can set ranges of approved data input values and for all fields, we can set domains which are predefined answers based on a list. To do so, select to create a list.

The screenshot shows the BirdOne Fly web interface. At the top, there's a navigation bar with 'Home', 'Gallery', 'Map', 'Scene', 'Groups', 'Content', and 'Organization'. Below that, a blue header contains 'Example template' and tabs for 'Overview', 'Data', 'Visualization', and 'Settings'. The 'Data' tab is active, showing a layer named 'Point layer' and buttons for 'Table' and 'Fields'. A modal window titled 'example field' is open, displaying field settings:

Settings	
Allows Null Values	Yes
Editable	Yes
Default Value	None
Length	256
Unique	No

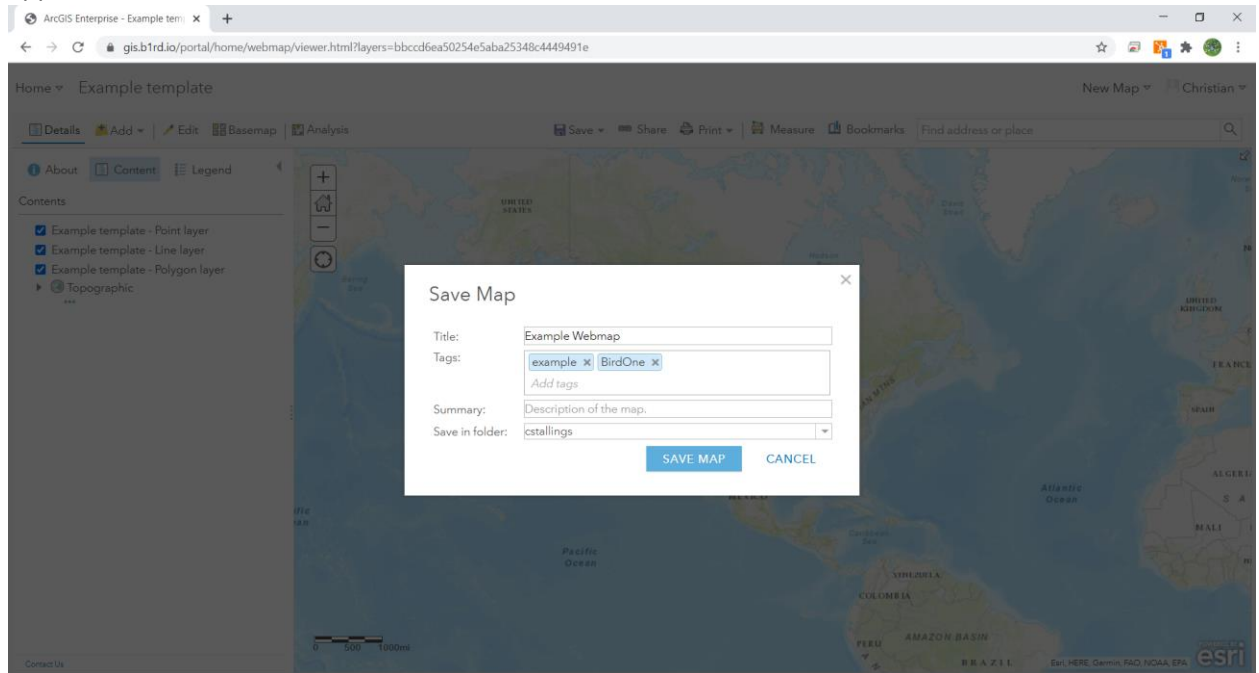
Below the settings is a 'Details' section showing 'Type: String' and 'Name: example\_field'. To the left of the settings is a list of fields, with 'example field' selected. Below the modal, another modal titled 'List of Values: example field' is open, showing a table for defining values:

Label	Code
excellent	excellent
good	2
3	3
value you want displayed	value you want stored in the table

There are 'Generate List', 'Cancel', and 'Save' buttons at the bottom of the interface.

- Once you have set up your data the way you want, you are ready to create a web map. Go back to the overview tab to create a web map. Hit the down arrow next to open in map viewer and select add to a new map. In the map view, we can set up our map any way we want with our customized data. You may want to display features by symbology based on a field or change your background map or change your extent. The colors and display types you choose will also dictate how that data shows up in BirdOne Fly. Once you have your web map set up the way you want, select save to save your web map. This is what will ultimately be shared with BirdOne's Fly

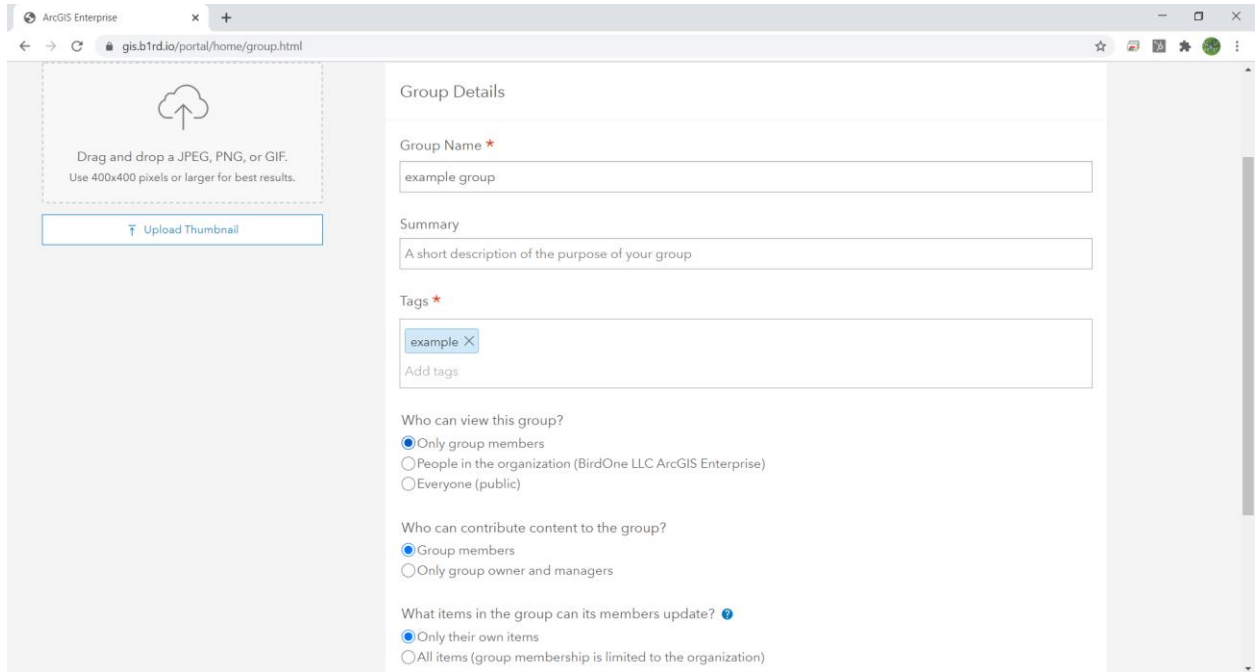
app.



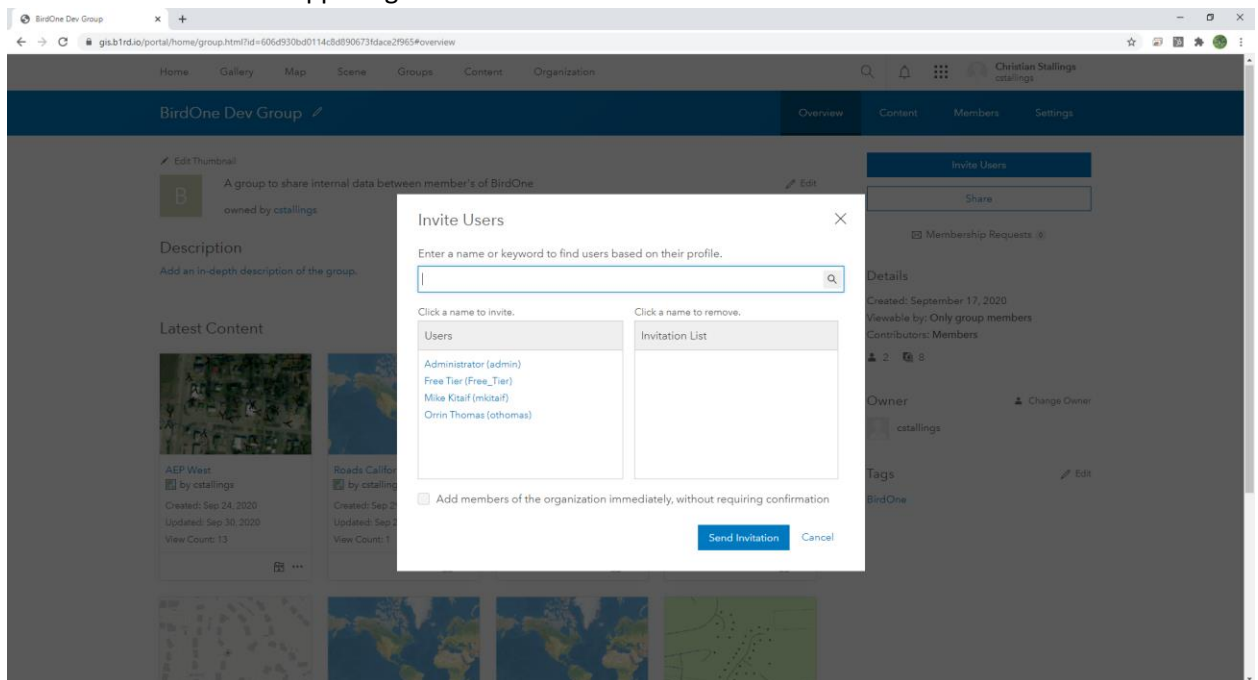
10. Once your map is saved you should be able to access it immediately with the BirdOne Fly app. If multiple people from your team will be working on it, you will need to modify your sharing for the web map so that others can view and edit it as well. To do so, go back to the contents page and find your web map. On the right, there should be three dots next to that item.

## Sharing with Groups and your Organization

1. To have multiple people work on the same map, you will need to set up sharing for everyone. This can be accomplished in several ways.
2. The first and most common method is to use groups. First, you will need to create a group by selecting the group tab on the top of your portal. On the left select, the create group tab.
3. On the group setup page, enter a group name, tags, and select the group options. It is recommended to create a group that can only be viewed by group members and only group members can contribute.

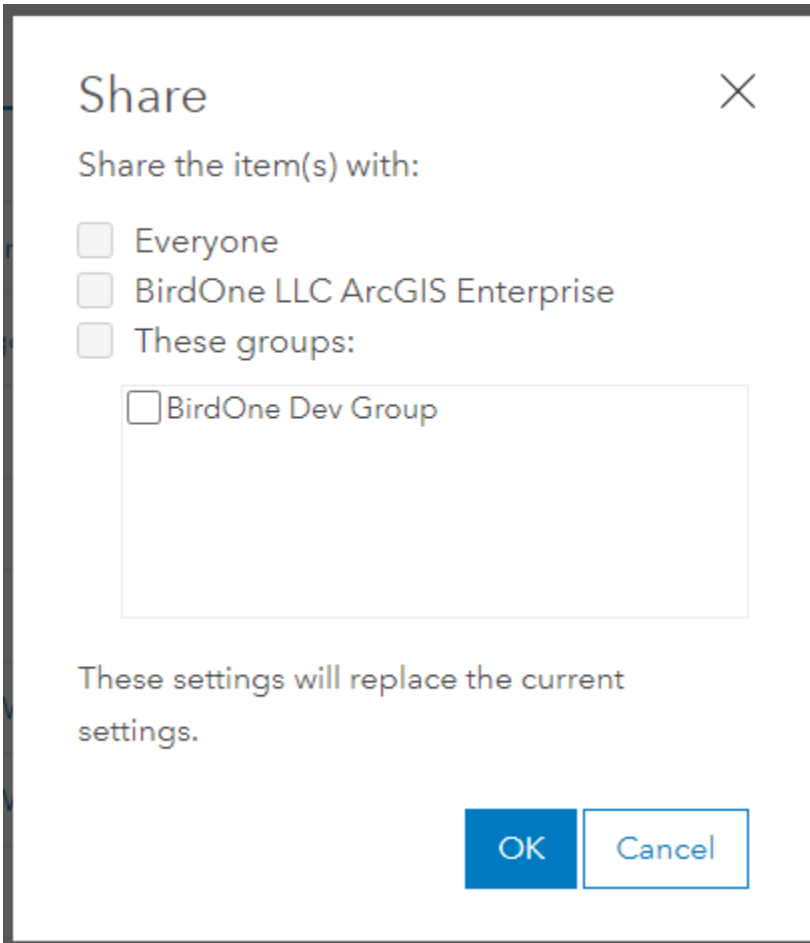


- Once your group is created you can select that group and invite members. Members will be allowed to access all content shared with the group. To invite members, select the Invite members button in the upper right.



- Now that you have created a group you will need to share your web maps with that group. To do so, go back to my content and select the first of the three icons on the right for the web map you wish to share. The icon will either be a globe, two people, a building, or a lock. The lock means it is only shared to you, the two people means it's shared to a group, a building means it's

shared to the entire company, and a globe means it's shared to anyone in the world. Select the icon and click access which will bring up the share screen.



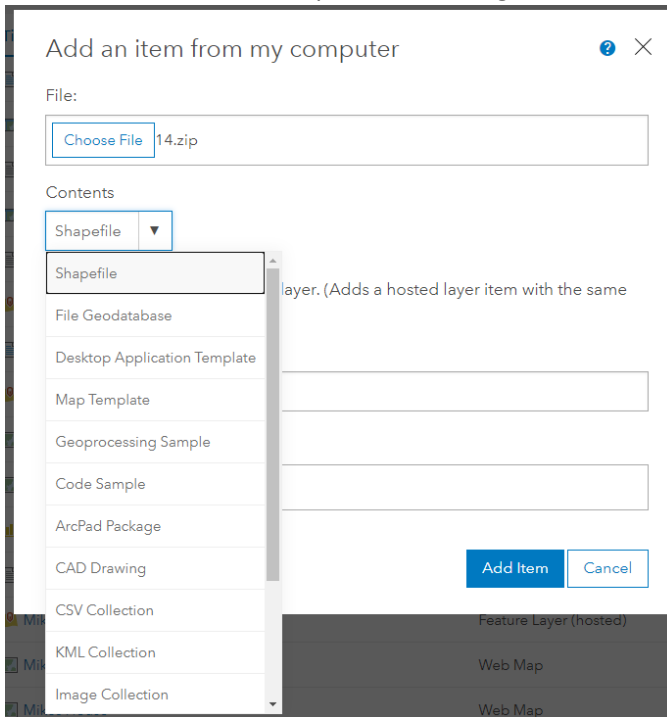
Select the level of sharing you wish to use. Our recommendation is to create groups and share with groups.

## Importing Existing GIS Data

1. Often you may have an existing shapefile, Geodatabase, or other GIS formats that you would like to access through the portal. To do so, go to the content page and select add Item in the upper left corner. This will allow you to add an item from your computer.
2. Once you select to add an item from your computer, a dialog will come up. The files you want to import must be saved as a zip file. Browse to the zip file of the item you want to upload and then select the type of item. Finally, enter the requested information about the item. The most



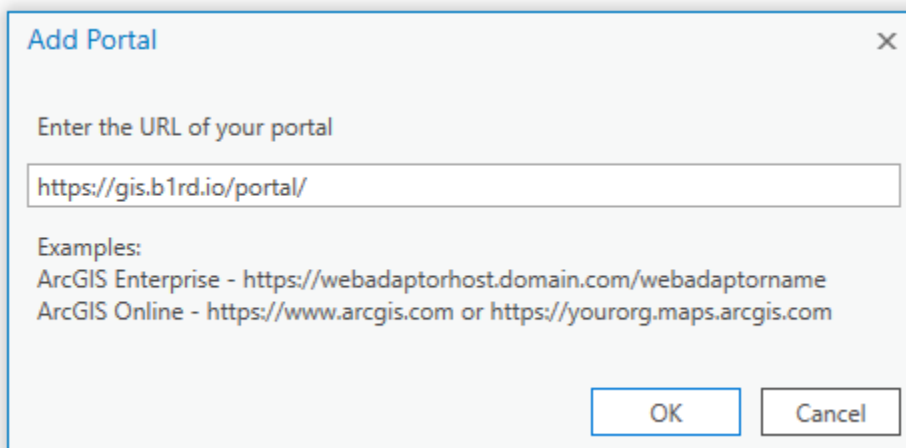
common items will be shapefiles and file geodatabases.



3. Once you have uploaded your item follow steps 9 and 10 to create a new web map from the portal to create a web map and save it for offline use.

## Share Web map from ArcGIS Pro

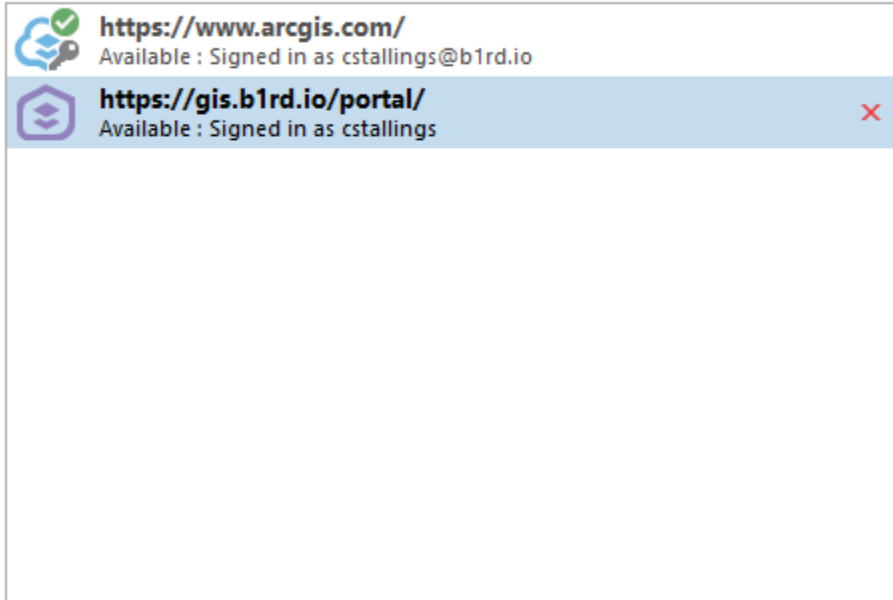
1. The last way to share a web map is to use ArcGIS pro. ArcGIS Pro is highly connected to the Portal environment. To access this functionality, you will need to first add your portal to ArcGIS Pro. To do so, select the project tab at the top, and from there, select portals on the left.
2. On the portal screen select add portal. You will be asked to enter a URL. Enter the URL for either ArcGIS Online or ArcGIS Enterprise



3. Once you enter the URL the portal will be added to the list of portals. From there you will need to right-click the portal and select sign in. This will prompt the OAuth sign-in page. Enter your

username and password for your account. You should now see the portals as Available.

# Portals



[Learn more about managing portal connections](#)

4. Once you are signed in you can now start to build your web map in ArcGIS Pro. Add any data, base maps, or information you want to your web map. When you have created the web map the way you want, select the share tab at the top of the screen.
5. There are multiple ways to share data however you want to share it as a web map. Select the Web Map icon in the Share As section of the ribbon on the top. This will bring up a window on the right-hand side. Fill out the map information as you want it to show up in your portal. Select Copy all data: Exploratory as your sharing configuration and set the location to your root folder. For sharing, setup any groups you have created in the past. When you are complete with this step select analyze to make sure everything will share correctly.

### Share As Web Map

Map

**Map** Configuration

**Item Details**

Name  
Example Map

Summary  
Example Summary

Tags  
Example Tags X

Select a Configuration ⓘ  
Copy all data: Exploratory

**Location**

Folder  
cstallings@b1rd.io (root)

**Share with**

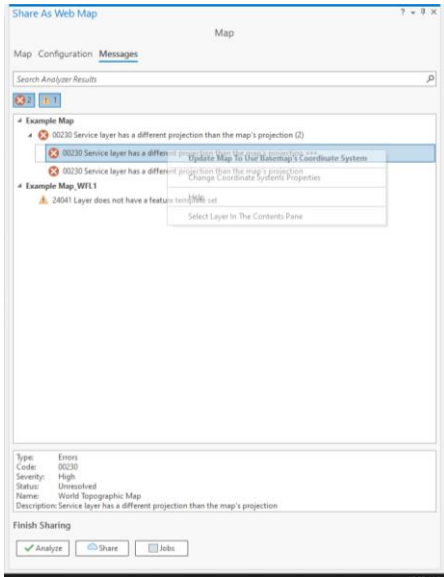
Everyone  
 BirdOne LLC  
Groups ▾

**Finish Sharing**

Analyze Share Jobs

- Once you select Analyze you may get some errors. A very common error is the map projections. All web maps are projected in Web Mercator and often our data is in a more common projected

coordinate system. To fix this issue simply right-click the error and select Update web map to use basemap's coordinate system.



7. Once all your errors are cleared you can select share. Sharing may take a bit of time at first but once it's complete, it is now accessible with BirdOne Fly.