



April 2023

Insights in ArcGIS Online Implementation Guide

Essential tasks and best practices for setting up Insights in ArcGIS Online.

Task checklist

TASK	COMPLETE
1. Get to know ArcGIS Insights	<input type="checkbox"/>
2. Set up ArcGIS Online	<input type="checkbox"/>
3. Assign Insights licenses	<input type="checkbox"/>
4. Configure connectors	<input type="checkbox"/>
5. Learn more	<input type="checkbox"/>
6. FAQ	<input type="checkbox"/>

1. Get to know ArcGIS Insights

We're glad you've decided to start using Insights in ArcGIS Online for your organization. If you have little or no GIS experience, that's okay—now is a great time to get started with Esri's geovisual analytics software.

ArcGIS Insights combines data visualization and analysis to accelerate decision making. Deploying Insights with ArcGIS Online provides mapping and analysis in the cloud through a software as a service (SaaS) offering.

Accelerate your analysis

From interactive charts and maps to advanced analytics, Insights has a wide range of capabilities that are used across a diverse array of industries. Below, you'll find a small sample of real-world scenarios accompanied by a guided exercise. You can review the exercises now and return to them after completing the set-up tasks in this guide.

- **Data visualization**—Spatial and nonspatial visualizations help translate your raw data into a format that can be explored and interpreted. Learn how you can use interactive maps and charts to [analyze traffic accidents](#) in Ottawa, Canada.
- **Advanced analytics**—With Insights, you can quickly move from data visualization to analytical techniques, such as link analysis and advanced statistical methods. Learn about using link analysis in Insights to [analyze the global refugee crisis](#).
- **Interactive reports**—After you've finished your analysis, it's often important to report your findings to key stakeholders. In Insights, you can share your analysis as an interactive report, allowing your stakeholders to explore your results and gain even more insights. Learn how to [create a report](#), or use the [Insights gallery](#) to view real-world examples.

[Find more Insights tutorials on Learn ArcGIS](#)

ArcGIS free trial

If you're still making up your mind about Insights, you can enroll in the [ArcGIS free trial](#). The 21-day trial includes access to ArcGIS Online, plus Insights licenses.

2. Set up ArcGIS Online

Now that you've decided to use Insights in your organization, you need to set up ArcGIS Online.

Insights in ArcGIS Online is licensed through an ArcGIS Online organization. For detailed information about setting up ArcGIS Online, see the [ArcGIS Online Implementation Guide](#). You won't need to read the full guide, just follow the steps outlined in Activate your subscription (page 4) and Add members (page 8). More details about the specific licensing requirements for Insights will be discussed later in this guide.



3. Assign Insights licenses

Before members of your organization can use Insights, they must be granted the necessary user type, role, and license. An ArcGIS Online administrator can [manage the user types and roles](#) and [assign licenses](#) for an organization.

Note: If your organization does not have Insights licenses, or if you need to purchase additional licenses, contact your Esri account manager or [Esri Sales](#) for assistance.

Each Insights analyst in your organization must have one of each of the following:

- **User type**—Creator or GIS Professional
- **Role**—Publisher, Facilitator, or Administrator
- **License**—Insights license

Note: There are several capabilities in Insights that are only available to administrators. Therefore, it's best practice to assign an Insights license to at least one member of your organization with an Administrator role.

Members of your organization with the necessary user types, roles, and licenses assigned can now access and [sign in](#) to Insights.

Note: Members of your organization without the required licensing to use Insights can still access Insights as a viewer. Any members of the organization can open Insights in viewer mode and view reports and workbooks that were shared with them.

For more information and assistance with purchasing, contact [Esri Sales](#).

[Learn more about licensing in Insights](#)

4. Configure connectors

Additional configurations may also be required for your organization to access data from certain connectors:

- **Microsoft OneDrive and SharePoint connectors**—Microsoft OneDrive and Microsoft SharePoint are important data repositories for many organizations. A Microsoft 365 administrator must [register Insights with Microsoft Azure](#) before connections can be made to [OneDrive](#) or [SharePoint](#).
- **ArcGIS public**—Public data from ArcGIS Online can be accessed within Insights. You must be allowed to search for content outside your organization to use ArcGIS public data in Insights.

Learn more

Congratulations! If you've followed the steps in this guide, you've successfully deployed Insights in ArcGIS Online for your organization.

The resources in this section will help you troubleshoot, answer questions, and find further training courses.

- Now that you've completed the Insights deployment process, you can revisit the resources in the [Get to know ArcGIS Insights](#) section.
- The [Learn ArcGIS gallery](#) includes a collection of tutorials, articles, stories, and videos that help you learn about ArcGIS. It also includes [tutorial series](#) of related resources about a specific topic.
- Browse the [ArcGIS Insights Resources](#) page to find recommended learning materials, blogs, documentation, and more.
- [ArcGIS Insights help](#) is a key resource for learning how to use the software in general and to perform specific tasks. Search by keyword to find documentation, such as [what's new](#) and [frequently asked questions](#).
- Join the ArcGIS Insights community on [Esri Community \(GeoNet\)](#). Here you can join discussions with other Insights users and Esri staff, ask questions, or submit ideas for features you'd like to see in the future. For more news direct from the Insights team, follow the [ArcGIS Blog](#).
- The GIS community, including Esri, shares thousands of ready-to-use authoritative datasets in [ArcGIS Living Atlas of the World](#). Living Atlas covers everything from historical census data to environmental conditions derived from live sensor networks and earth observations.
- Contact [Esri Technical Support](#) for technical issues or [Esri Sales](#) for licensing questions.

FAQ

How do I purchase Insights?

You can purchase ArcGIS Insights licenses by contacting your Esri account manager or [Esri Sales](#).

Can I use Insights with ArcGIS Enterprise?

Yes. You can deploy Insights with ArcGIS Online, ArcGIS Enterprise, or as a desktop application.

Can I use Insights on a Mac?

Members of your organization can access Insights in ArcGIS Online through a [supported web browser](#), including on a macOS computer.

Insights desktop is available to all Insights users and can be [installed on a macOS computer](#).

