

## ArcGIS Installation Guide

ArcGIS® is a powerful geographic information system for working with maps and geospatial information. This software is **free** to you and your students as an educator. The Engineering Essentials curriculum will introduce students to GIS analysis using ArcGIS Online, a cloud-based geographic information system.

The steps required before Core Training **may take up to 10 business days to complete however, your part will only take 3-5 minutes.** Confirm with your ArcGIS Site Coordinator that there are no existing active accounts at your school. If no one at your school uses ArcGIS, the first steps are not only quick and simple they are also imperative to complete as soon as possible to be ready for Core Training.

If you've used ArcGIS in your school, then your ArcGIS Coordinator can make an administrator account for you. We still encourage you to read through this document as preparation for managing your own users and groups. If you are uncertain about if your school has an existing account, asking your Principal or school IT. If no one knows about an ArcGIS Online subscription, then this document will walk you through the entire process.

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## First Steps

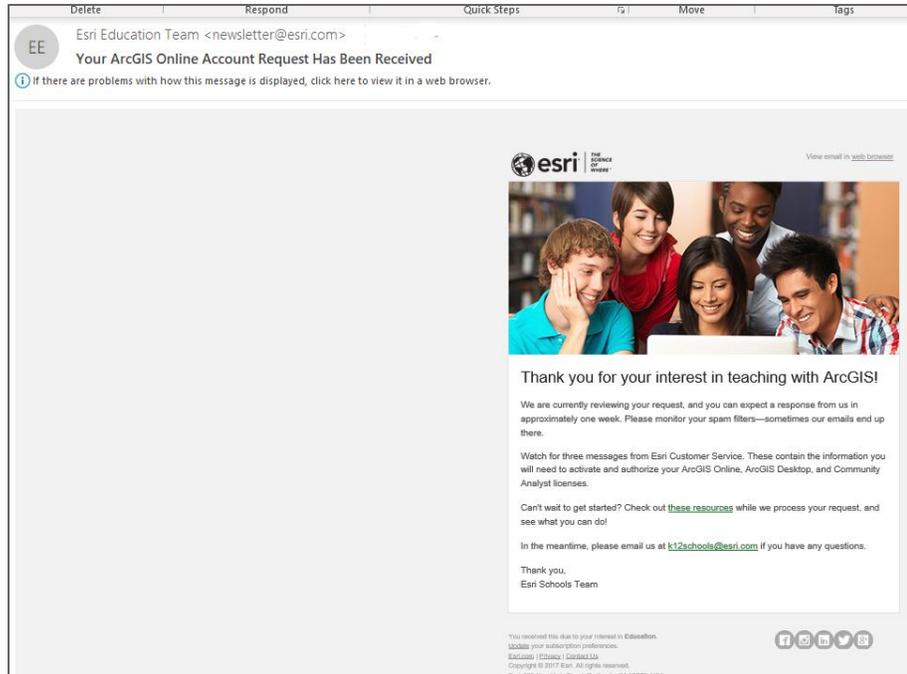
Request a free ArcGIS for Schools licensing bundle. **The Organization Name that you select will appear in the banner on the home page and will also be in the URL for your ArcGIS Online website** (org-name.maps.arcgis.com). It should be a clear and complete name since the home page can be public facing and has the capability to display student and/or teacher work.

**Note:** *It is imperative that you request a school bundle for your class as soon as possible (it may take up to 10 business days to process your request) so that you can be ready for Core Training.*

- First visit the [link](#) and complete the form to “Request a Free ArcGIS for Schools Bundle.” We recommend that you request licenses based on the number of students in your school, rather than in your class, to allow for the possibility of expanded ArcGIS use in other courses. The free software bundle includes:
  - ArcGIS Online organizational and user accounts for teachers and students.
  - Ready-to-use web and mobile apps.
  - ArcGIS Community Analyst licenses.
  - ArcGIS Desktop Advanced licenses.
  - ArcGIS Pro licenses (these are not utilized in the EES curriculum).
  - Option of 50, 500, 2,000, or 10,000 named users (class, school, or district).
- Once you complete the form, you will receive an email with additional information and steps to set-up your organization.

## Your request is now complete.

Shortly you will receive an automated response that “Your ArcGIS Online Account Request Has Been Received.” In 1-10 business days you will get another email confirming your school’s account. Guides to setup your organization and best practices are found later in this document. If you would like to preview how Esri presents an ArcGIS enabled classroom while you are waiting for your subscription to be completed, read this introductory material excerpted from Esri’s *Teach with GIS Implementation Guide: For the Classroom* document or visit their home page for schools at <http://esri.com/schools>.



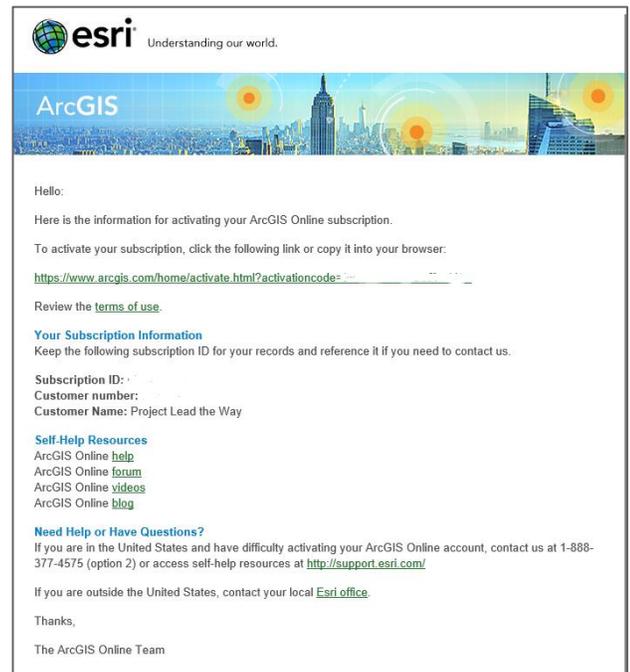
## After Your School’s ArcGIS Online Subscription Has Been Activated

Once you receive an email confirming your school’s subscription information you are ready to continue following the steps and best practices outlined in this PLTW Instillation guide for ArcGIS. The order of the steps and the best practices discussed are in large part taken from Esri’s *Teach with GIS: Implementation Roadmap for Schools* document.

This guide is meant to walk you through the steps necessary to get you ready for Core Training and the start of school. At the end of this instillation guide is a checklist of skills and resources as well as an “Optional” section for ArcGIS enthusiasts.

## What Does Having an ArcGIS Online Subscription Mean?

ArcGIS Online is cloud-based mapping and analytics software that you can access via a website. You can configure a customized experience that makes sense for your school. For example, you set the security and sharing policies, assign privileges and credits to members



based on the work they need to do, and configure your home page and gallery to reflect your school or district. You can also integrate your enterprise single sign-on system. A subscription to ArcGIS Online includes the following main components:

- Home page: Your home page will be many people's first impression of your site. Include an appealing banner and your own logo or school symbol, feature your best maps and apps, and provide descriptions, links, or resources to help people get the most out of your site.
- Groups: Groups are a way to organize your members and content around different classes, subjects, specific projects, workflows, and initiatives. You can set up groups to allow access to specific items based on your organization's structure.
- Members: Add new users (your students or colleagues) to ArcGIS Online by inviting them to join or adding them directly. You can add members in bulk or one at a time. You can set up their accounts for them, let them create their own accounts, or use your existing enterprise single sign-on login system.

Content: ArcGIS Online includes everything you need to create maps, apps, and layers. It also provides resources to effectively store, categorize, edit, and share what you've created.

### Activating Your Subscription / Initial Setup

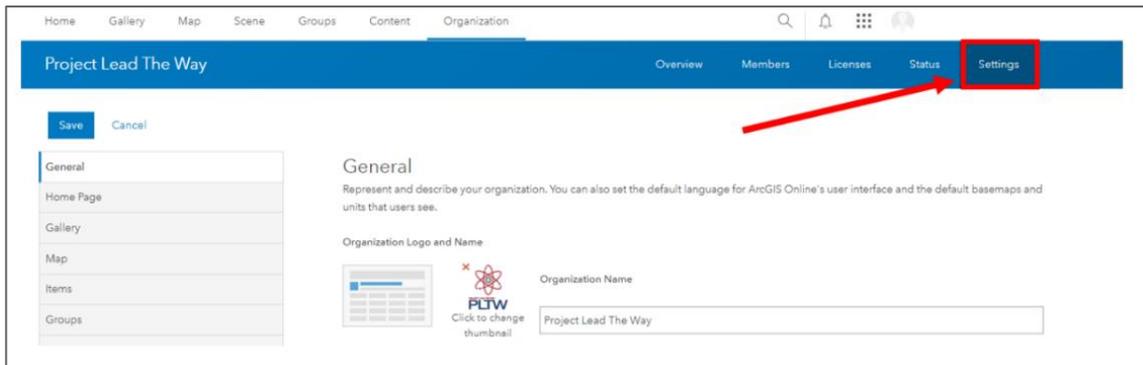
Each header below contains a series of steps you need to follow to create, manage and customize your school's ArcGIS Online account. You are encouraged to complete all steps now and bookmark this document as a reference. Depending on your comfort level with technology, it should only take 20 min – 1 hour to complete. The site is user friendly and the directions are easy to follow and once the process is complete there is very little "upkeep" time. If you are unable to complete all steps at once, navigate through the "Contents" section above to easily find what you need.

### Customizing Your Home Page and Creating Administrators

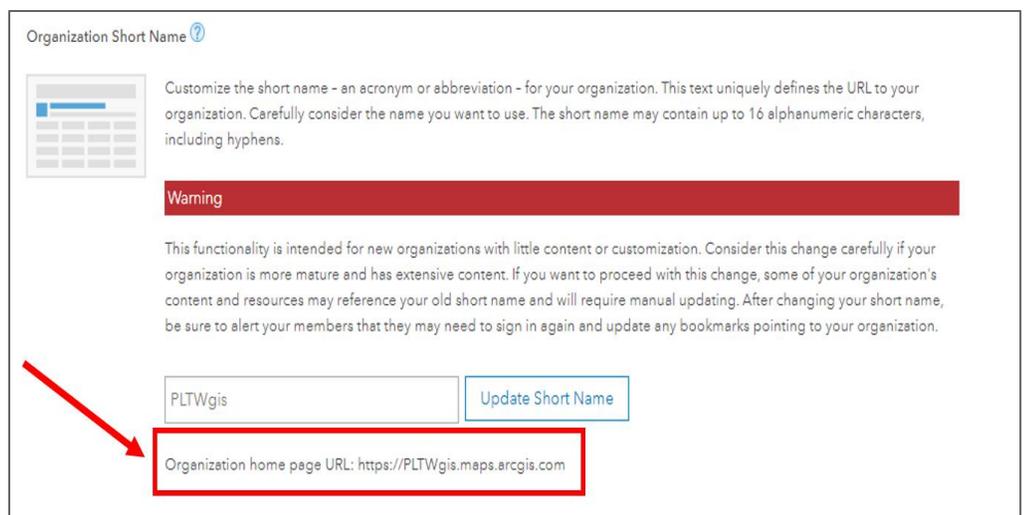
1. Sign in to your ArcGIS Account.
2. From the Home page, click the Organization tab.



3. Select Settings.



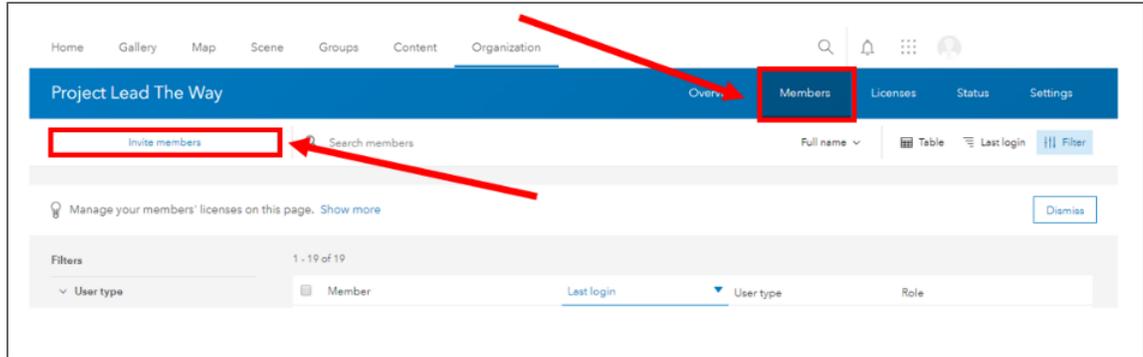
4. Scroll down and create a **Short Name** for your organization. This is the way your organization will appear in the URL link to your home page. **Pay close attention to the warning associated with the input of the short name.**



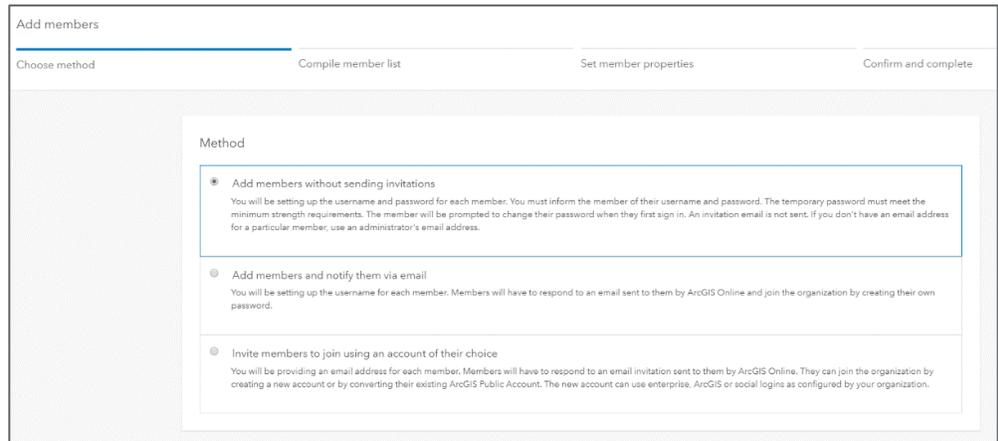
5. Administrative contacts are those individuals that Esri can notify with information about new updates to the system, and who you've authorized to speak with customer service for any technical issues. It is recommended that you select two or more people such as department heads, Administrators and PLTW site coordinators who will monitor school emails throughout the year. To create additional Administrative contacts, from the Home page click the Organization tab.



6. Click on Members and then Invite Members



7. Choose one of the following methods below to invite two or more additional members who would be reliable long-term contact people and can be trusted to have administrative rights.



Esri has a fair amount of great built-in tools for personalizing your website. There are clear directions going through each of your options and things like banners stock photos and fonts are readily available and easy to use. You can further customize your ArcGIS site by following the directions in the “Customizing the appearance of your site” section in Esri’s Configure your organization’s website lesson.

## ArcGIS Online Privacy and Security Settings

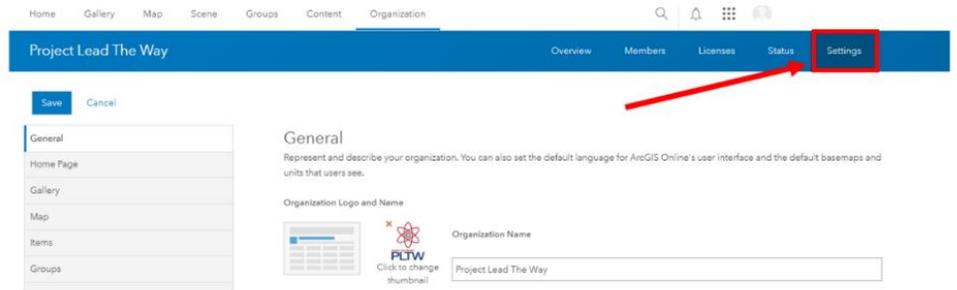
You can configure the privacy and security controls that make sense for your organization. For example, you can choose to allow members to share content outside your organization or only allow sharing within the organization. You can also set up enterprise logins and multifactor authentication. Esri recommends you allow access to ArcGIS Online, data, and all other assets through HTTPS only to help protect your information. Share this link to Esri ArcGIS Online support with your IT professional to learn how to set up your security policies.

**PLEASE NOTE:** Some default settings enable sharing of information that is not appropriate for students. It is strongly recommended to minimize the sharing of student’s personally identifiable information (PII) which Esri Teach with GIS Implementation Road map for Schools document address. As an administrator for your organization you can change sharing settings later but

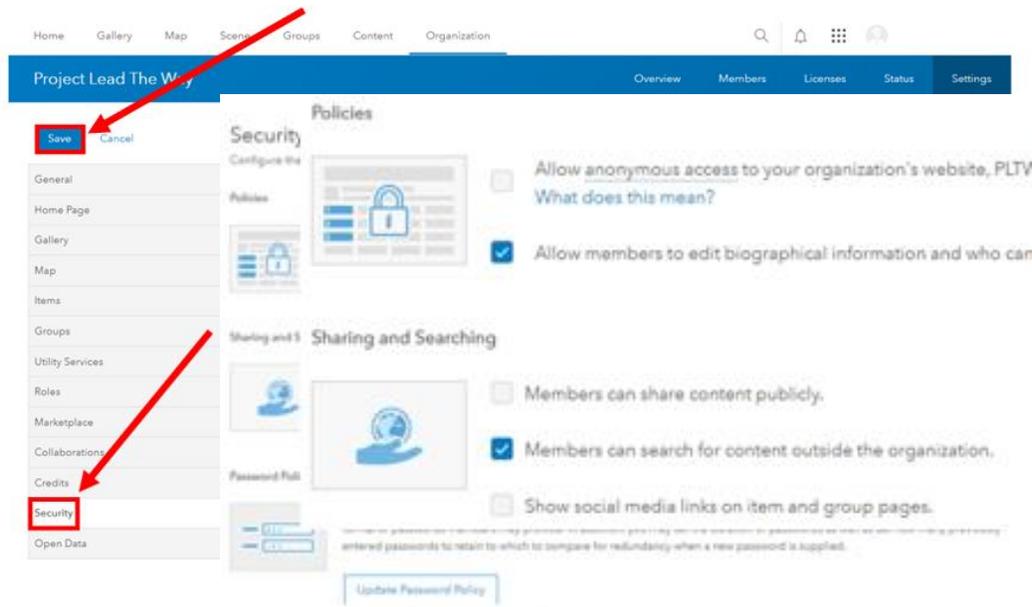
right now you should follow the steps listed below to ensure your students' privacy. Additional suggestions for creating groups can be found within Esri's Road Map for Schools document referenced above. Below are the steps required for you to have the appropriate settings for your organization.

## Creating Groups with Privacy Settings

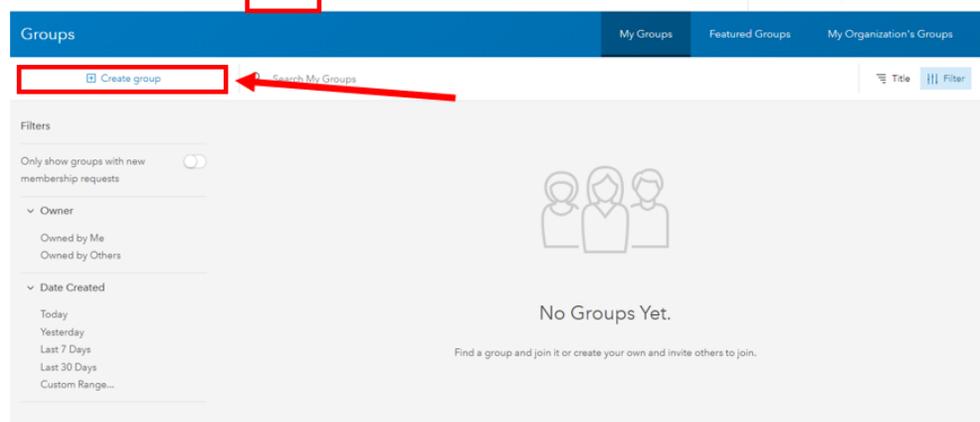
1. From the Organization Tab Select Settings.



2. Choose the Security menu and select only the boxes with the checkmarks shown below. Click the Save button when finished.



3. To create a group, first click the Groups tab and then Create group.



4. For each section of Engineering Essentials you will be teaching, create a new group with the settings shown below.

Home Gallery Map Scene Groups Content Organization

### Create New Group

Drag and drop a JPEG, PNG, or GIF. Use 400x400 pixels or larger for best results.

Upload Thumbnail

**Group Details**

Group Name \*  
Block1\_EES\_2019

Summary  
HighSchool 1st Block EES Class\_Entire Class

Tags \*  
EES X Block 1 X  
Add tags

Who can view this group?  
 Only group members  
 People in the organization (Project Lead The Way)  
 Everyone (public)

Who can contribute content to the group?  
 Group members  
 Only group owner and managers

What items in the group can its members update? ⓘ  
 Only their own items  
 All items (group membership is limited to the organization)

It is recommended that you include the year as an identifier in the name for easier management of groups over time.

## Adding Members and Managing Student / Teacher Accounts

ArcGIS Online has the capability to use your existing single sign-on enterprise login system. You are encouraged to read or forward to interested parties this information on Esri's website.

When creating new users, called members, you can add them automatically or invite them to join your organization. You can add and invite members one at a time, or you can upload a file and invite them in bulk. You can set up and assign roles of member accounts yourself or let members create their own accounts as part of the invitation process. Roles and User Types are associated with specific rights for that ArcGIS account and Esri has best practices for adding members in the Teach with GIS Implementation Guide For the Classroom document.

Follow the steps provided on Esri's webpage to invite and add members. Note Step 5 takes you through the bulk upload process. Use this excel template and populate **rows** 2-(up to 201) with your class's relevant information. **Columns** 5 and 6 should only be populated with the default setting provided. Roles and User Types are explained in both previously referenced Esri resources and are easily changed later, but it is recommended that **Creator** and **Publisher** be used as the default setting for all bulk uploads. **PLEASE NOTE**, you are also advised in step 11 to shut off automatic notification of emails. This too can be easily changed but most administrators will appreciate opting out of notifications preemptively.

## Managing Licenses, Creating Content and Learning More

When you are ready to begin exploring ArcGIS Online please refer to this [Teach with GIS Implementation Guide For the Classroom](#) for more guidance from Esri. Through the PLTW curriculum you will learn and become proficient at using ArcGIS with your students.

### Checklist

	Task	Description / Notes
✓	Request a Free ArcGIS for Schools Bundle	
✓	Receive an email confirming your school's account and Activate Account	
✓	Identify an Administrative Contact(s) and Account Setup	
✓	ArcGIS Online Privacy and Security Settings	
✓	Adding Groups with Appropriate Privacy Settings	
	Adding Members and Managing Student / Teacher Accounts	This should be completed after class rosters have been close to finalized
	Managing Licenses, Creating Content and Learning More	
	Customize your School's ArcGIS site – Directions from Esri	

### Support

- You can contact the PLTW Solution Center at 877- 335-7589 or [solutioncenter@pltw.org](mailto:solutioncenter@pltw.org).
- [Esri's Getting Started for Educators](#)
- [Esri's FAQ page](#)

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