



ArcGIS Account and Student Set Up

Technology used in



Updated: 4/29/2021

Table of Contents

Requesting a Free ArcGIS for Schools Bundle	1
Understanding Student Data in ArcGIS School Organizations	1
Edit Short Name URL for your Organization	2
Setting Security Settings	4
Creating a Student Specific Role for your Organization	6
Adding Members (students) To Your Organization	13
Setting Up a Group	17
How Students Log In	21

Requesting a Free ArcGIS for Schools Bundle

1. Navigate to <https://www.esri.com/en-us/industries/education/schools/schools-mapping-software-bundle#%20>
2. Scroll down to fill out the information needed in the “**Request a Free ArcGIS for Schools Bundle**” section and select the **Submit** button at the bottom of the webpage to submit a request for a free ArcGIS for Schools licensing bundle.
3. You will receive a notification email from ARCGIS indicating they are working to review your request**

****This initial request can take up to 1-10 business days to process, please plan accordingly.**

Understanding Student Data in ArcGIS School Organizations

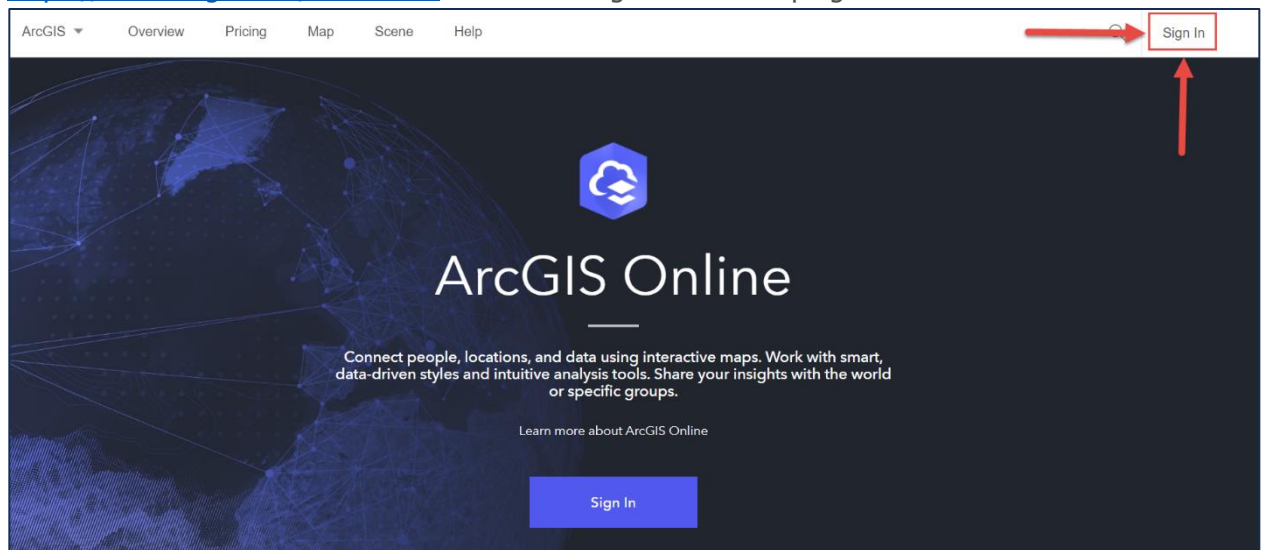
[This site](#) provides guidance for K12 (primary and secondary) schools on the use of ArcGIS Online Organizations. It gives the basic info needed to understand what an Organization is and does and why schools and districts should use them. It presents guidance and suggestions, not hard and fast rules. These include the suggestions on how to exclude student PII. It also includes links for more information on key matters. It gets updated on an as-needed basis.

If you have more questions around school organizations, PII, and Student Data Addendums, feel free to reach out to schools@esri.com.

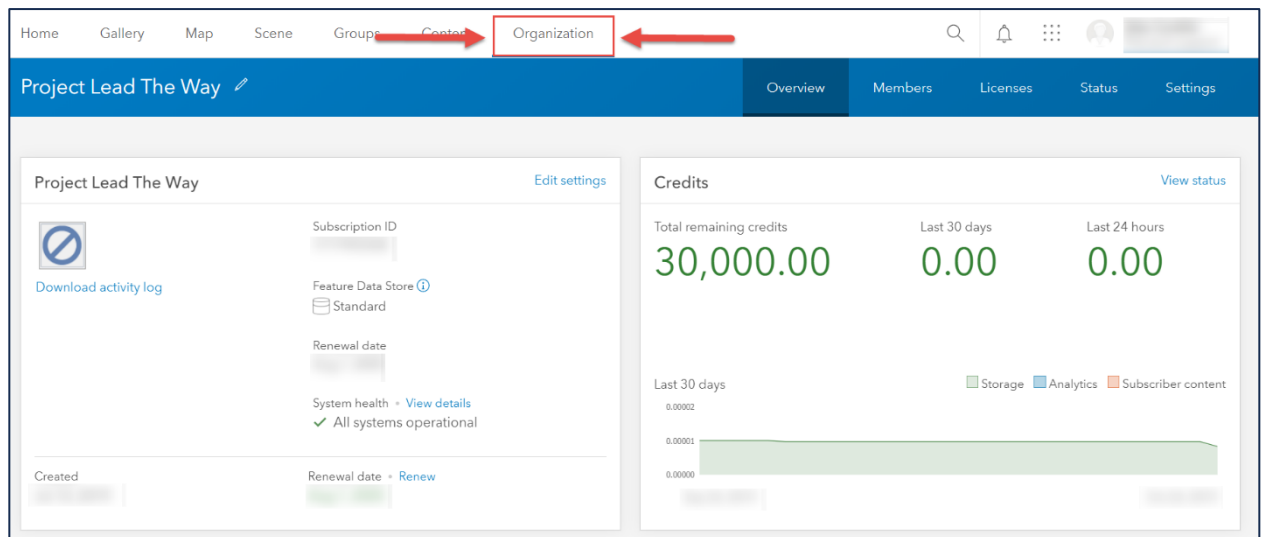


Edit Short Name URL for your Organization

1. Once your ARCGIS account has been activated, navigate to <https://www.arcgis.com/index.html> and select Sign In at the top right of the screen.



2. Once you have signed into your account, select the **Organization** tab at the top of the screen.





3. Select the **Settings** button to the top right of the screen.

4. Scroll down to the **“Organization Short Name”** section. Type in a short version of your organization name such as an acronym for your school and select the **“Update Short Name”** button. This will provide a shorter URL that you will later provide to students so they can easily log into their student accounts.



Setting Security Settings

1. Once you have signed into your account, select the **Organization** tab at the top of the screen.

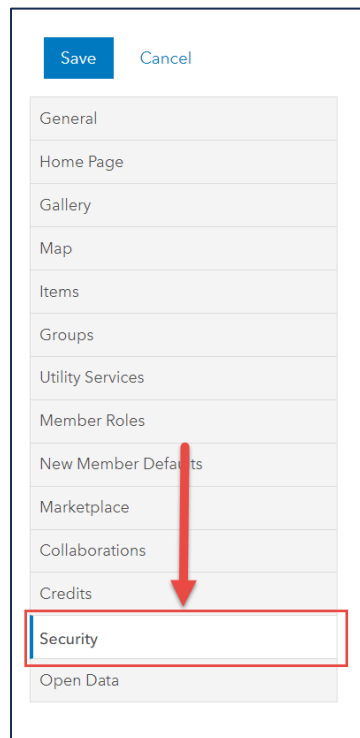
The screenshot shows the PLTW user interface. At the top, a navigation bar includes links for Home, Gallery, Map, Scene, Groups, Content, and Organization. The Organization tab is highlighted with a red box and a red arrow. Below the navigation bar, the main content area is divided into two sections. The left section, titled 'Project Lead The Way', contains a 'Download activity log' button, a 'Subscription ID' field, a 'Feature Data Store' dropdown menu set to 'Standard', a 'Renewal date' field, and a 'System health' status showing 'All systems operational'. The right section, titled 'Credits', displays 'Total remaining credits' as 30,000.00, and 'Last 30 days' and 'Last 24 hours' credits as 0.00. A bar chart below the credits shows usage for Storage, Analytics, and Subscriber content over the last 30 days.

2. Select **Settings** near the top right of the screen.

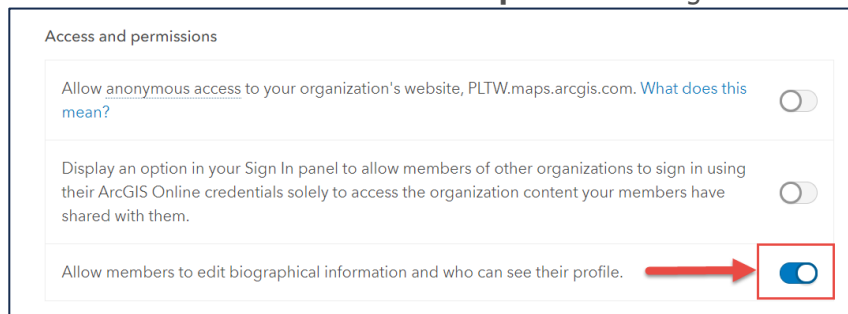
The screenshot shows the PLTW user interface with the Organization tab selected. In the top right corner of the main content area, a 'Settings' button is highlighted with a red box and a red arrow. The rest of the interface, including the navigation bar and the 'Project Lead The Way' and 'Credits' sections, remains the same as in the previous screenshot.



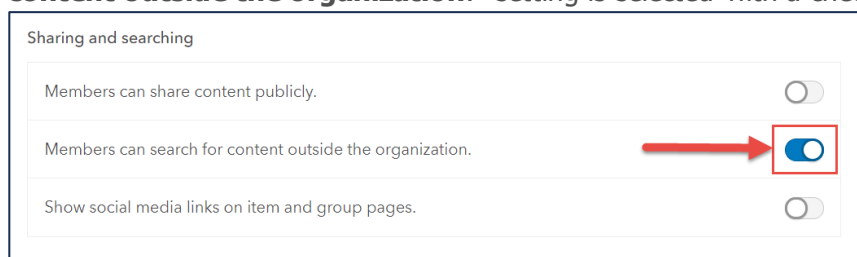
3. Select **Security** from the list of settings to the left of the screen.



4. In the **Policies** section: Ensure only the “**Allow members to edit biographical information and who can see their profile.**” setting is selected with a checkmark.



5. In the **Sharing and Searching** section: Ensure only the “**Members can search for content outside the organization.**” setting is selected with a checkmark.

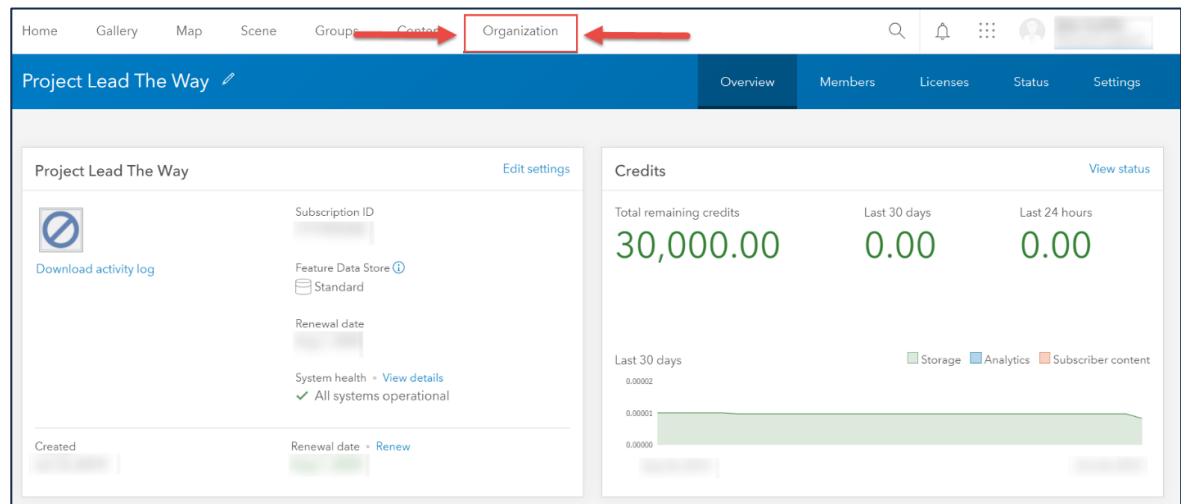




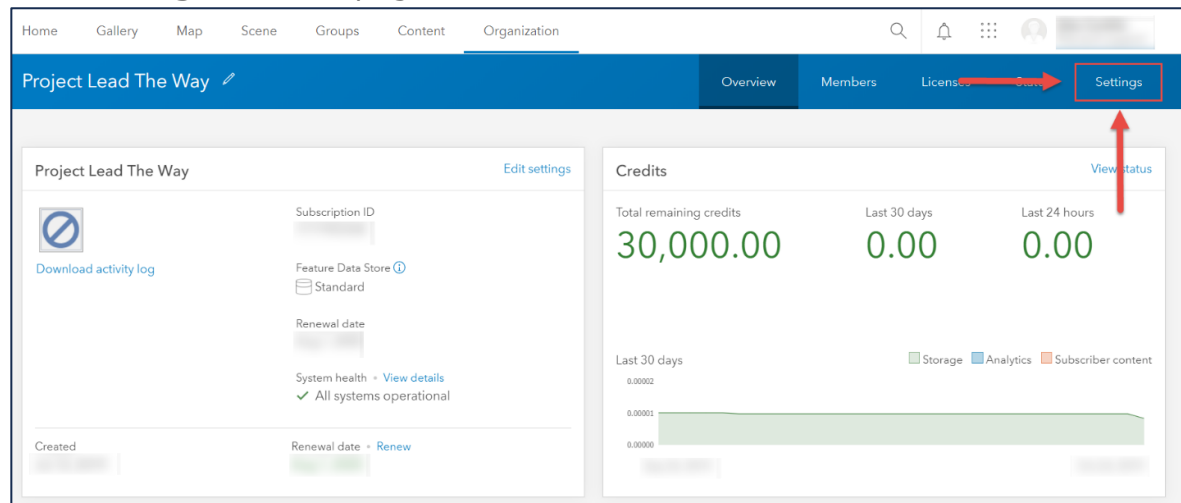
Creating a Student Specific Role for your Organization

Here we will create the Student role for your organization. This role will be used when adding your students to the organization to ensure students all have the correct privileges and access.

1. Once you have signed into your account, select the **Organization** tab at the top of the screen.

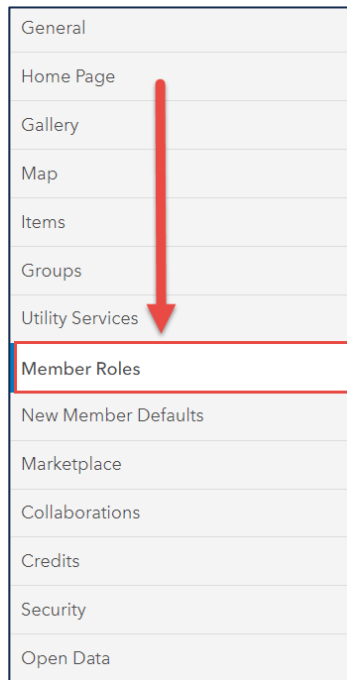


2. Select **Settings** near the top right of the screen.





3. Select **Member Roles** from the list of settings to the left of the screen.

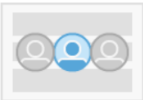


4. Select **Create Role**

Member Roles

Create, edit, and manage member roles in your organization. You may create a role based on an existing role or role template, allowing or denying privileges associated with the role as you deem necessary.

Note that when creating or editing a role, changes aren't saved until you click Save role.



Create Role

Assign Roles

Role Name	Members	
Administrator	3	
Data Editor	0	
Publisher	2	
User	4	
Viewer	0	



5. Type in **Student** as the **Role name**.

Create a new role

Role name
 ←

Description

Privilege compatibility
View — View and edit — View, edit, create and manage

Compatible with GIS Professional Advanced user type

6. Select **Expand All** button to show a drop down of assignable privileges for the role.

Privilege compatibility
View — View and edit — View, edit, create and manage

Compatible with GIS Professional Advanced user type

Role privileges

Expand all

7. Select the **General Privileges** as seen in the screenshots below. There will be no **Administrative Privileges** assigned to this role.

Members Enabled: 1/1 Disable all

View → ☒

Allow member to view members of the organization.



Groups

Enabled: 3/6

Enable all

Create, update, and delete	<input checked="" type="checkbox"/>
Allow member to create, edit, and delete their own groups.	
Join organizational groups	<input checked="" type="checkbox"/>
Allow member to join groups within your organization.	
Join external groups	<input type="checkbox"/>
Allow member to join groups external to your organization.	
View groups shared with organization	<input checked="" type="checkbox"/>
Allow member to view groups shared with the organization.	
Invite partnered organization members	<input type="checkbox"/>
Allow member to invite members from partnered collaboration organizations to groups.	
Add members from other organizations	<input type="checkbox"/>
Allow member to create groups that allow members from other organizations, as well as invite external members to groups.	



Content

Enabled: 3/9

[Enable all](#)

Create, update, and delete

Allow member to create, edit, and delete their own content.



Publish hosted feature layers

Allow member to publish hosted feature layers from shapefiles, CSVs, etc.



Publish hosted tile layers

Allow member to publish hosted tile layers from tile packages, features, etc.



Publish hosted scene layers

Allow member to publish hosted scene layers.



Publish hosted tiled imagery layers

Allow member to publish hosted tiled imagery layers from a single image or collection of images. Requires an ArcGIS Image for ArcGIS Online user type extension.



View content shared with organization

Allow member to view content shared to the organization.



Create and edit notebooks

Allow member to create and edit interactive notebooks.



Schedule notebooks

Allow member to schedule future automated runs of a notebook.



View location tracks

Allow member to view members' location tracks via shared track views when location tracking is



Sharing

Enabled: 3/3

[Disable all](#)

Share with groups

Allow member to share content to groups.



Share with organization

Allow member to share content to your organization.



Make groups visible to organization

Allow member to make groups discoverable by your organization.





▼ **Premium Content**

Enabled: 6/8

[Enable all](#)

Geocoding

Allow member to perform credit-consuming geocoding tasks with ArcGIS World Geocoding Service (or a view of this locator). [Learn more](#)



Network Analysis

Allow member to perform network analysis tasks such as routing and drive-time areas.



Spatial Analysis

Allow member to perform spatial analysis tasks.



GeoEnrichment

Allow member to geoenrich features.



Demographics

Allow member to make use of premium demographic data.



Imagery Analysis

Allow member to perform imagery analysis tasks. Requires an ArcGIS Image for ArcGIS Online user type extension.



Advanced notebooks

Allow member to import and use ArcPy modules in notebooks.



Feature report

Allow member to create feature reports in Survey123.



▼ **Features**

Enabled: 1/2

[Enable all](#)

Edit

Allow member to edit features in editable layers that are not public, based on the edit options enabled on the layer.



Edit with full control

Allow member to add, delete, and update features in an editable, hosted feature layer, regardless of the editing options enabled on the layer.





8. Select **Save Role** near the top right of the screen.

Create a new role

Role name
Student

Description
This will be the default role for students in the organization.

Privilege compatibility

View View and edit View, edit, create and manage

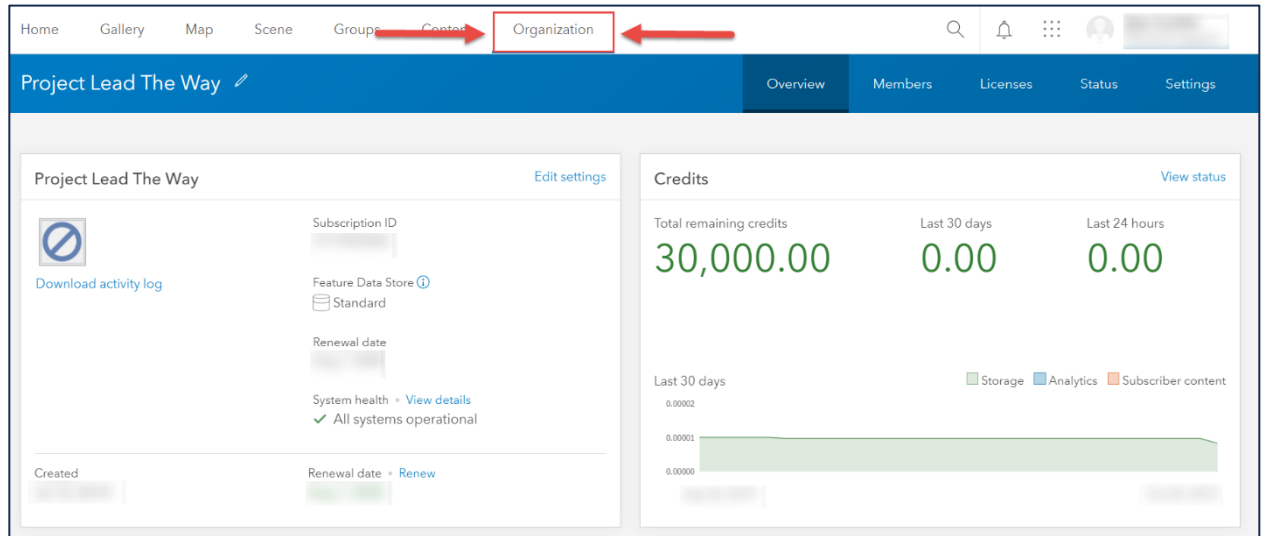
Compatible with GIS Professional Advanced user type

Save role Discard

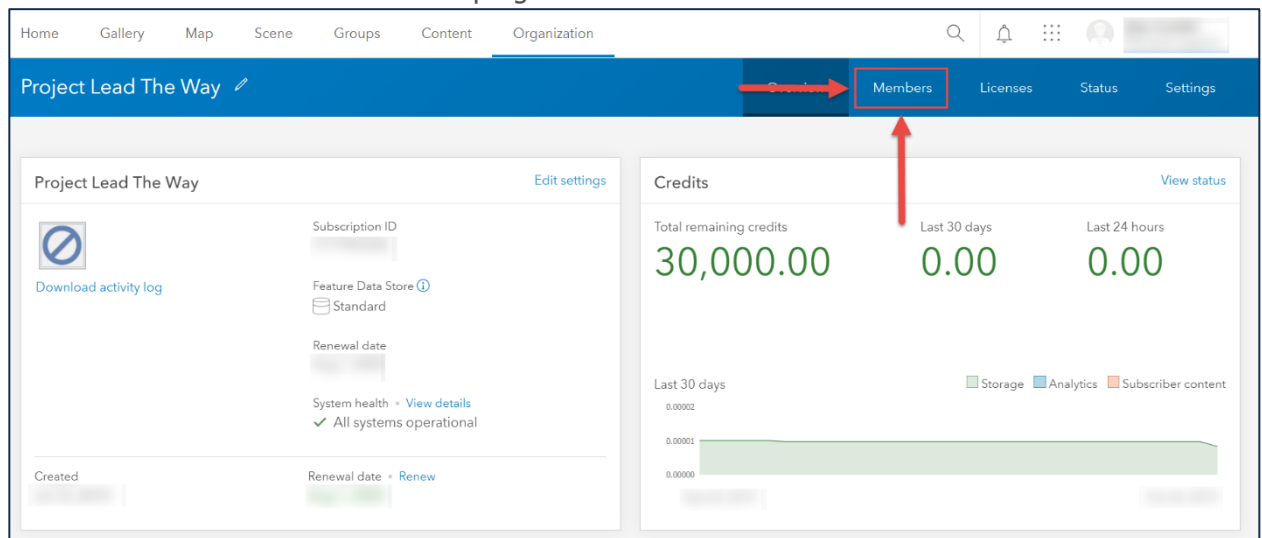


Adding Members (students) To Your Organization

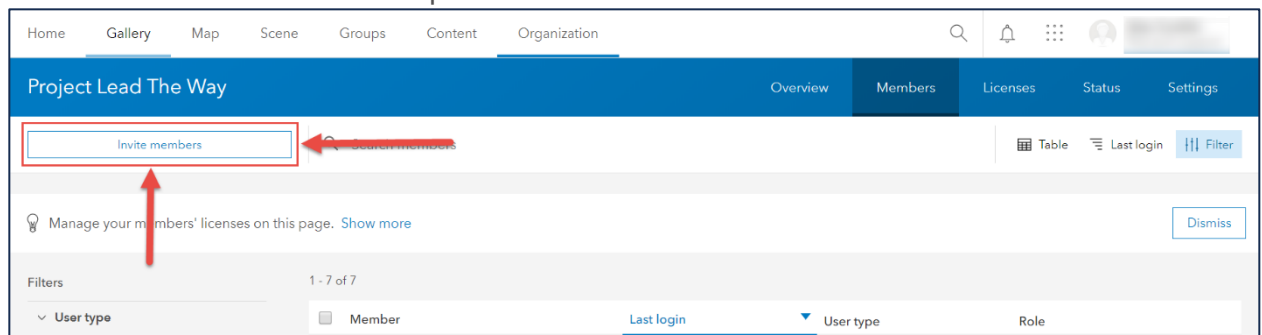
1. Once you have signed into your account, select the **Organization** tab at the top of the screen.



2. Select the **Members** button to the top right of the screen.



3. Select **Invite Members** to the top left of the screen.





4. Select the, “**Add members without sending invitations**” method and select the “**Next**” button in the bottom right corner.

Method



☒ **Add members without sending invitations**
You will be setting up the username and password for each member. You must inform the member of their username and password. The temporary password must meet the minimum strength requirements. The member will be prompted to change their password when they first sign in. An invitation email is not sent. If you don't have an email address for a particular member, use an administrator's email address.

☐ **Add members and notify them via email**
You will be setting up the username for each member. Members will have to respond to an email sent to them by ArcGIS Online and join the organization by creating their own password.

☐ **Invite members to join using an account of their choice**
You will be providing an email address for each member. Members will have to respond to an email invitation sent to them by ArcGIS Online. They can join the organization by creating a new account or by converting their existing ArcGIS Public Account. The new account can use enterprise, ArcGIS or social logins as configured by your organization.

[Next](#) [Cancel](#)

5. Select **New Members from a File**

[New member](#) [New members from a file](#)



6. Fill out [THIS](#) .csv file to invite all of your students in bulk. Enter in one student per line on the file. Start with your first student's information on line 2. Do not edit line 1 in any way as these headers are needed by ARCGIS to properly invite your members in bulk.
- Enter "**GIS Professional Advanced**" in the User Type field. (see screenshot below)
 - Enter your created "**Student**" role for the Role field (see screenshot below)
 - **IMPORTANT NOTE:** Do not enter information past line 200. If you have more students than one upload will allow, please upload two separate files to avoid any errors.

	A	B	C	D	E	F	G	H	I
1	Email	First Name	Last Name	Username	Password	User Type	Role		
2	john.doe@email.com	John	Doe	johnd_PLTW	PLTW!697	GIS Professional Advanced	Student		
3	jane.doe@email.com	Jane	Doe	janed_PLTW	PLTW!935	GIS Professional Advanced	Student		
4									
5									
6									
7									

7. Upload the filled-out template by clicking the **Browse** button and selecting the file from your computer.

Add members from a file

Drag and drop or **browse** for a csv file (UTF-8)

Header (first row) should contain field names exactly as they appear below.

Required fields

First Name	Role
Last Name	User Type
Email	Password
Username	


Next Cancel



8. Once you have uploaded the template, and all required fields show a green check mark, select **Next**.

Required fields


<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Role
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> User Type
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Password
<input checked="" type="checkbox"/> Username	

 **Next** Cancel

9. You will now be presented with a list of the students you have created accounts for as seen below. Select **Next** in the bottom right of the screen.

1 - 3 of 3

<input type="checkbox"/>	Student Name Username Email	User type	Role	Included licenses	
<input type="checkbox"/>	Student Name Username Email	User type	Role	Included licenses	
<input type="checkbox"/>	Student Name Username Email	User type	Role	Included licenses	

 **Next** Cancel

10. You will then be asked if you would like to add on any additional licenses. Simply select **Next** at the bottom right of the screen to skip this step.

Assign licenses

☒ ArcGIS Pro

☒ ArcGIS Pro Advanced
Included in some user types



Extensions

☐ Select all

<input type="checkbox"/> 3D Analyst	500 available
<input type="checkbox"/> Data Interoperability	500 available
<input type="checkbox"/> Geostatistical Analyst	500 available
<input type="checkbox"/> Image Analyst	500 available
<input type="checkbox"/> Locate XT	500 available
<input type="checkbox"/> Network Analyst	500 available
<input type="checkbox"/> Publisher	500 available
<input type="checkbox"/> Spatial Analyst	500 available

Applications

<input type="checkbox"/> ArcGIS Community Analyst	500 available
<input type="checkbox"/> ArcGIS Insights	500 available
<input type="checkbox"/> CityEngine	500 available

  **Next** Cancel

11. You will now have a summary page of the number of students you are adding. Select **Add Members** to finalize.



Summary
Add members without sending invitations

Members

Total members to be added
2

GIS Professional Advanced 2

Properties

Enable Esri Access No

Profile visibility Organization

Start page Home

Language English - English

Number and date format US - US

Add members Cancel

Setting Up a Group

Once your Organization members have been added to the Organization, you can create groups for them to work in.

1. Once you have signed into your account, select the **Groups** tab at the top of the screen.

Home Gallery Map **Groups** Content Organization

Project Lead The Way

Overview Members Licenses Status Settings

Project Lead The Way

Subscription ID: 7777955508

Feature Data Store: Standard

Renewal date: [Date]

System health: All systems operational

Created: [Date] Renewal date: Renew

Credits

Total remaining credits: 30,000.00

Last 30 days: 0.00

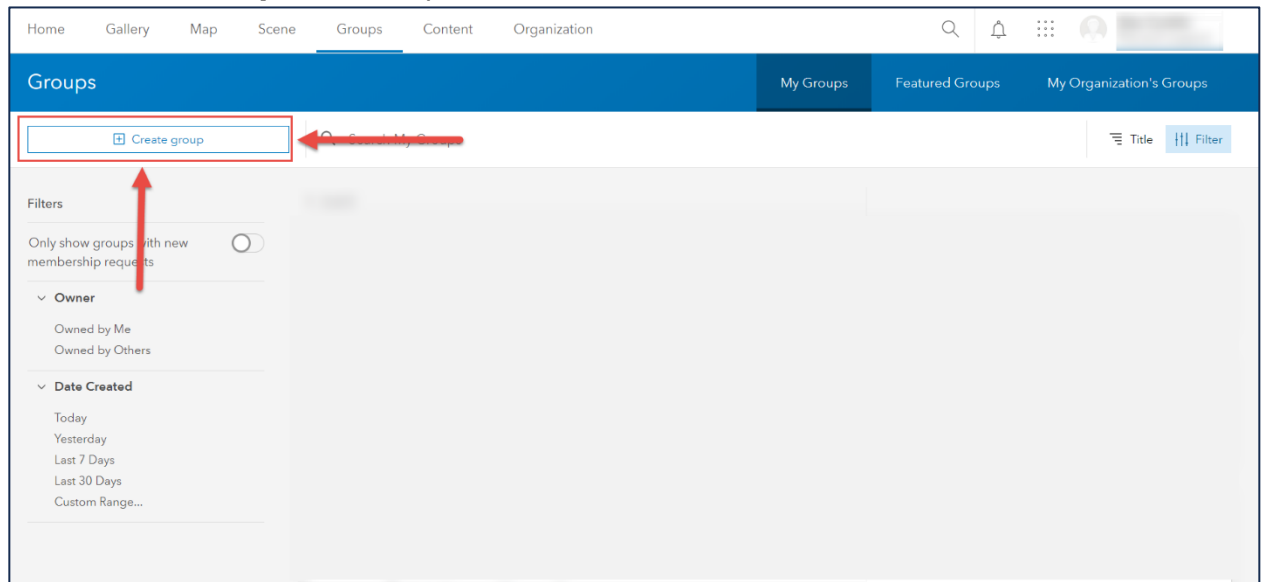
Last 24 hours: 0.00

Members

Total members: [Count] Pending members: [Count]



2. Select **Create Group** from the top left of the screen.



3. Fill out the information necessary to create the group as seen in the screenshot example below and select **Save**.

Create a group

Group overview

Name

Block1_EES_2021

Summary

A short description of the purpose of your group

Tags

EES X Block1 X

Add tags

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

Upload image

Group membership

Who can be in this group?

☒ My organization's members only

☐ Any organization's members



Create a group

Who can be in this group?

☒ My organization's members only

☐ Any organization's members

How can people join this group?

☒ By invitation

Who can view this group?

☒ Only group members

☐ All organization members

☐ Everyone (public)

Who can contribute content?

☒ All group members

☐ Group owner and managers

Who can see the full list of members on the group's Members tab?

☒ Anyone who can view the group

☐ Group owner and managers

Please Note: When setting up sharing for Classroom groups, Sharing should be turned off. If you are setting up smaller project groups for a classroom, sharing can be turned on for group collaboration. This setting **cannot** be changed for the group after the group is created.

Group designations

Shared update

Items in this group will be editable by all members of this group. ?

Membership is limited to your organization and all your collaborating organizations.

Administrative group

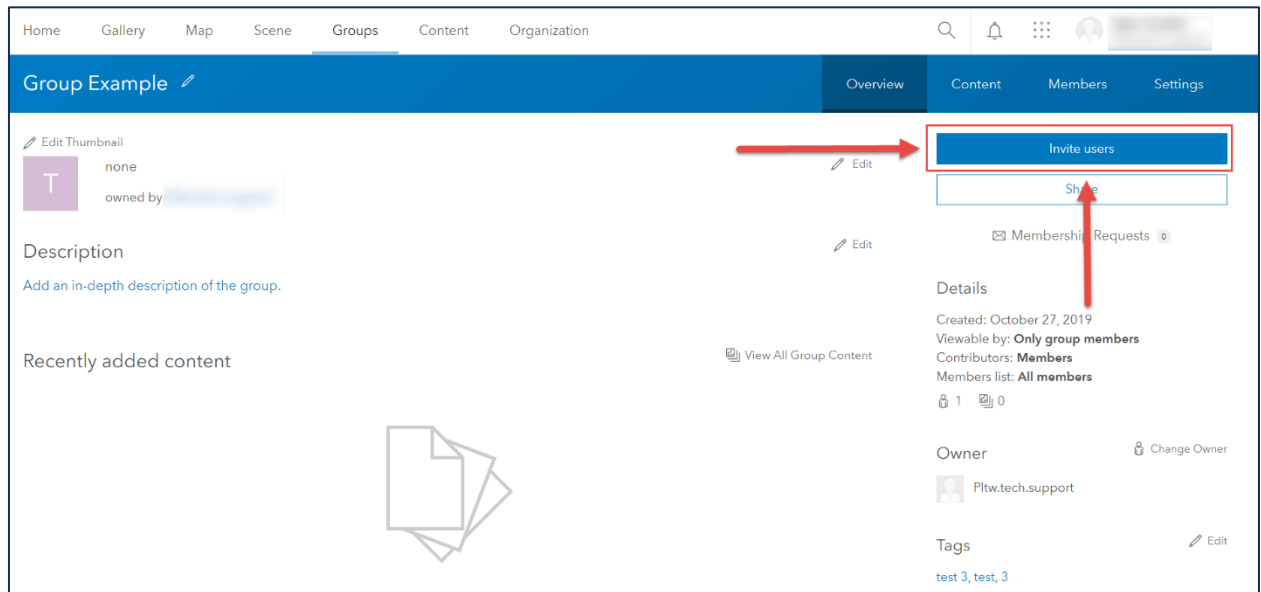
Members cannot leave this group. Only the group managers or owner can remove members from this group.

Membership is limited to your organization.

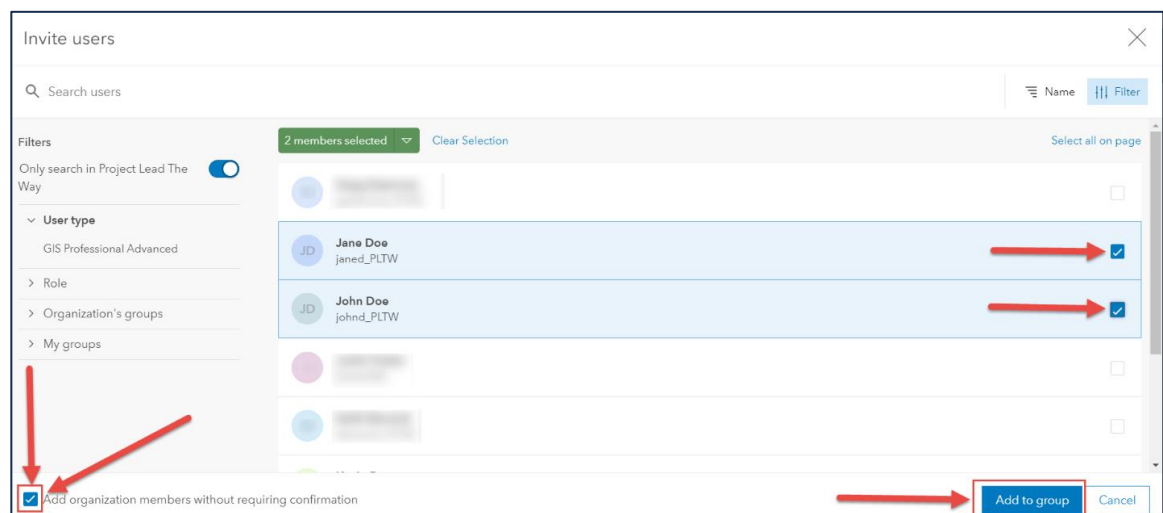
Save Cancel



4. You will now be presented with the group's page. To invite users from your organization into this selected group, select **Invite Users** near the top right of the screen.

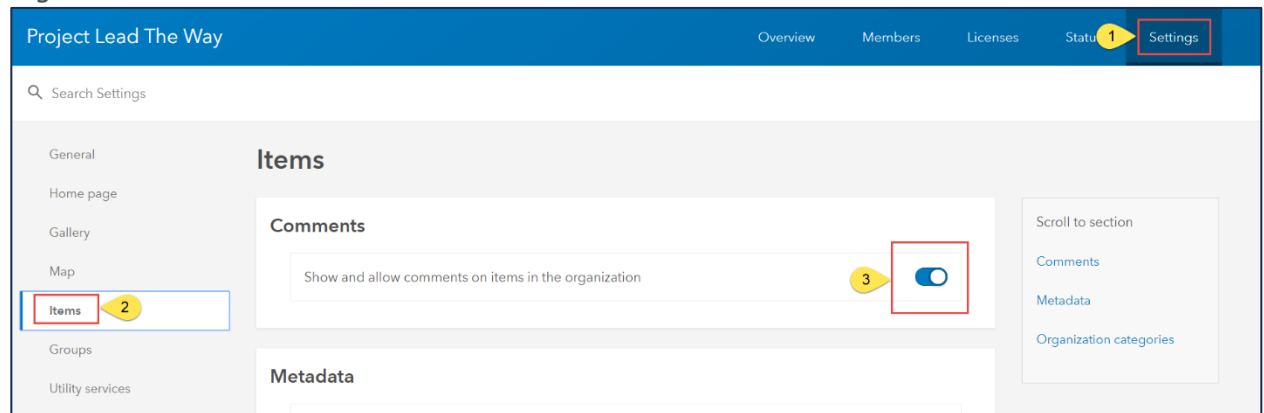


5. Select the users you would like to invite via the check box on the same line as their name to the far right of the pop up and select the **Add to group** button near the bottom right of the pop up.
- Ensure there is a check mark next to the **"Add organization members without requiring confirmation"** option before selecting Add to Group button as shown below.



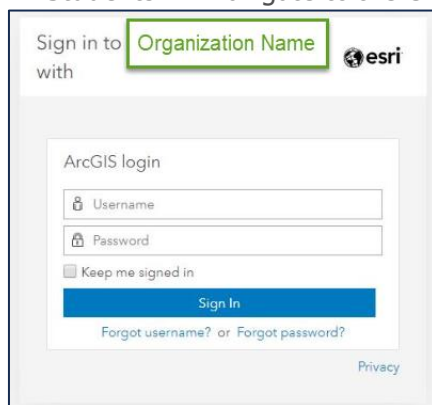


6. Navigate back to **Settings**, select **Items** to the right, and enable **Comments** for your organization.



How Students Log In

1. Provide students with your Organization's short name URL established in **step 4** of the **"Edit Short Name URL for your Organization"** section of this document.
 - It may be helpful to have students bookmark this URL for future use.
2. Students will navigate to the URL and be presented with the log in screen below.



3. Provide the students with the username and password you assigned them in the **"Inviting Members To Your Organization"** section of this document. They will now use this information to log into their accounts.