ArcGIS Online

Guide

Quick Start for the ArcGIS for Schools Bundle

A jumpstart to using an ArcGIS for Schools Bundle to provide ArcGIS accounts for instructional use to K-12 teachers and students

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Task checklist

This guide is a quick start for the people responsible for configuring and managing an ArcGIS for Schools Bundle, getting your organization ready and providing accounts to teachers and students.

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1. Welcome

Congratulations on receiving an ArcGIS for Schools Bundle!

An ArcGIS for Schools Bundle is software for making maps for the instruction of K-12 students. It includes an ArcGIS organization, user accounts, apps, and data that can be used by teachers and students. This guide is a quick start for the people responsible for configuring and managing an ArcGIS for Schools Bundle.

What this guide helps you do

An ArcGIS for Schools Bundle includes accounts and software. This guide takes you through setting up your online space and creating secure accounts for your users, maintaining compliance with common student privacy regulations such as COPPA, FERPA, and GDPR. With accounts, your teachers and students can use ArcGIS Online, web and mobile apps, and data–these are the most popular components of the bundle.

More advanced users may require installed software–see Install ArcGIS Pro.

What you won't find here

This guide is **NOT** for teachers who are curious what they can do with digital maps in the classroom. If you are looking for guidance on using GIS in your classroom, stop and see the resources website: https://esri.com/schools. That site helps you get started and build your use of GIS, as well as find activities to do with your students.

This guide also isn't a complete administration guide–as the title implies, it's a quick start guide, designed to get your teachers and students up and running once you have received your ArcGIS for Schools Bundle. See Get started with administration of ArcGIS Online for full guidance.

Personal information requirements

As you prepare your organization and accounts, keep in mind your school or district's security and privacy policies. Additionally, Esri **forbids inclusion of personally identifiable information (PII) about minors (students) when creating their accounts**.

You must not provide any student information that COPPA, FERPA, or GDPR defines as PI (including, but not limited to, first and last name or email address).
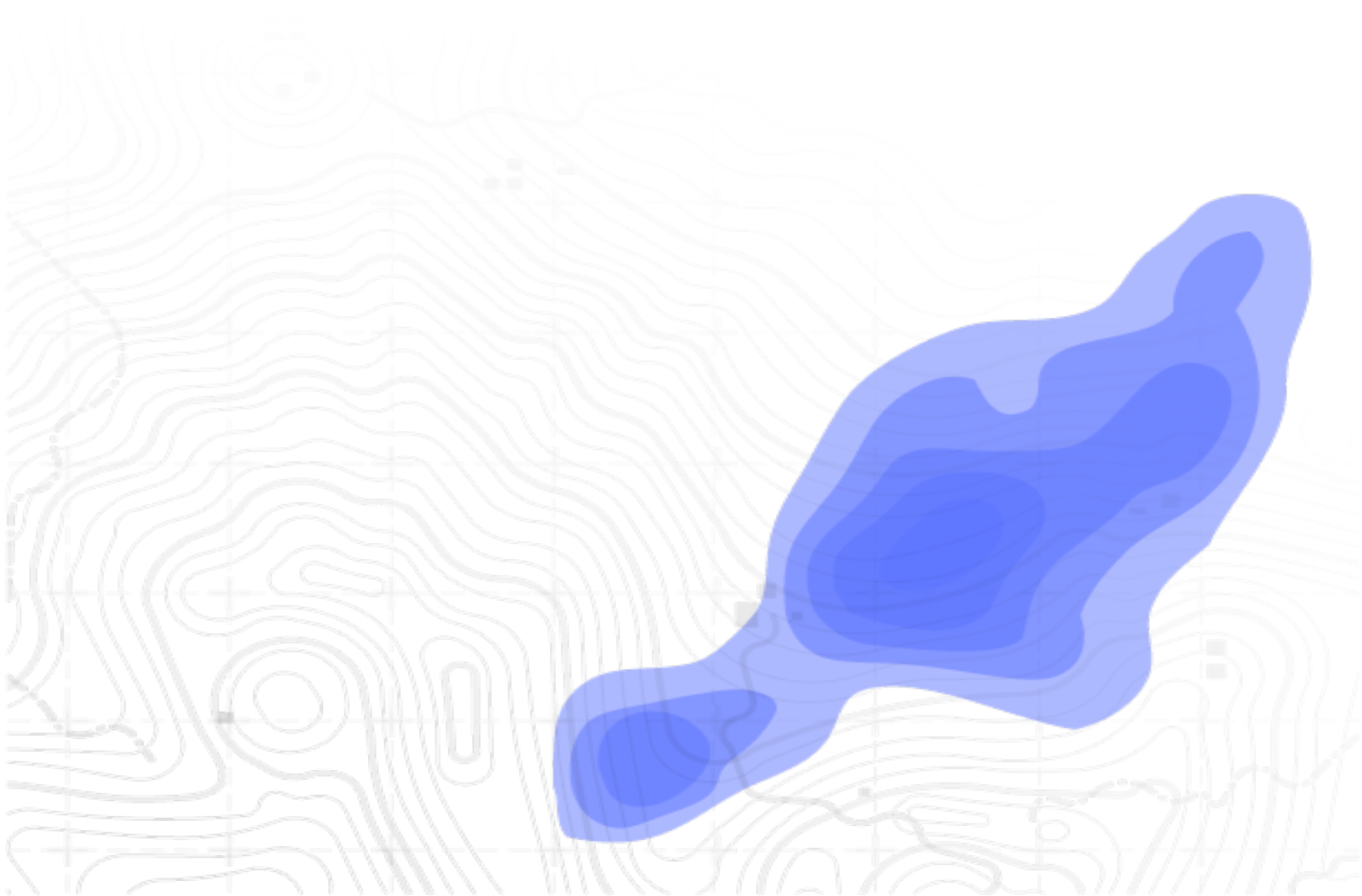
2. Activate your ArcGIS Online subscription

If you haven't already requested an ArcGIS for Schools Bundle (which includes an ArcGIS Online subscription), do so now: https://esriurl.com/schoolsoftware.

After your request for an ArcGIS for Schools Bundle is approved, you receive a couple of emails from Esri:

- One has the subject "Activate your ArcGIS Online Subscription"
- The other has your order number and "ArcGIS for Schools" in the subject line

Start by using the email with the subject "Active your ArcGIS Online Subscription." The activation process sets up your ArcGIS organization (your school or district's walled garden within ArcGIS Online) and gets it ready for use.

1. Plan your ArcGIS organization's short name.
   Your ArcGIS organization has a short name. It is both the subdomain (start) of your URL as well as the end of all usernames. It must be unique to all ArcGIS organizations. It can be up to 16 characters and include letters, numbers, and hyphens. Base the ArcGIS organization short name on the name of your school or district.

   a. If your subscription is for your **district**, use the district abbreviation. For example, Orange Tree Unified School District would use otusd. The URL will be https://otusd.maps.arcgis.com. Teacher (and adult) accounts are teacherSurname.otusd and student accounts are studentIDNumber.otusd.

   b. If your subscription is for your **school**, use the school name. For example, a school named Orange Tree Elementary would use orangetree. The URL will be https://orangetree.maps.arcgis.com. Teacher accounts are teacherSurname.orangetree and student accounts are studentIDNumber.orangetree.

2. Open the email from Esri with the subject "Activate your ArcGIS Online Subscription" and click the activation link.

3. Click **Create a new ArcGIS organization**.

4. The **Set up your organization** page appears. Do the following:

a. Provide a name for your ArcGIS organization.
Base the ArcGIS organization name on the name of your school or district. If your subscription is for your **district**, use the district name. For example, *Orange Tree Unified School District*. If your subscription is for your **school**, use the school name. For example, *Orange Tree Elementary*.

b. Provide the short name for your ArcGIS organization, using the name you decided on in step 1.

   Note: Since the short name must be unique to all ArcGIS organizations, you might not get your first choice and might have to come up with an alternate.

c. Choose the region for your organization.

d. For **Esri User Experience Improvement Program**, turn on the **Send anonymous usage data** toggle button to allow ArcGIS Online to collect usage information from members of your organization to improve the user experience.

e. Click **Next** and continue to the next step.

5. Provide your account details as follows:

   a. Type your first name, last name, and email address. Retype your email address to confirm.

   b. Select a user type of **Professional Plus** if you need advanced GIS applications. Otherwise, choose **Creator**.

      Note: A **Creator** has access to ArcGIS Online and most of the apps commonly used by teachers. However, if you teach GIS or CTE and use apps installed on your computer, like ArcGIS Pro or ArcGIS Drone2Map, choose **Professional Plus**. You can change the user type later.

   c. Review the Esri Master Agreement and Esri ArcGIS Online Privacy Policy. Check the boxes to accept and agree and click **Next**.

6. Set up your login as follows:

   a. Type a username.
   Create your username in the format surname.shortname, using the short name you decided on in step 1.

b. Provide a password and retype it to confirm it.
   With the ArcGIS default policy, the password must be at least 8 characters and contain at least one letter and one number.

c. Select a security question and provide an answer to it.

d. Click **Finish setup**.

Upon completion, your subscription is active, your ArcGIS organization is set up, and your account is ready to use.

3. Secure your organization

As the administrator of the organization, it is up to you to keep it safe and secure for your users. There are settings that help you do so, and that ensure students have appropriate permissions.

1. Sign in to ArcGIS Online with your ArcGIS account, if you aren't still signed in. To sign in, go to https://shortname.maps.arcgis.com (where shortname is your org short name) and follow the prompts to sign in.

2. In the top bar, click **Organization** and click the **Settings** tab.

3. Click **Security** on the left side of the page.

4. Under **Policies > Access and permissions**, turn off "Allow members to edit biographical information and who can see their profile" and "Allow anonymous access to your organization's website."

5. Under **Logins**, **turn off "**Social logins."

6. Create a secure, custom role for students as follows:

    a. While on the **Organization > Settings** tab, click **Member roles** on the left side of the page.

    b. Click **Create role**.

    c. In **Role Name**, type **Student**.

    d. Beside **Role privileges**, click **Set from existing role**, choose **Student Template**, and click **Import settings**.

    e. Disable public sharing for student accounts: go to **Role privileges**, expand **General privileges**, expand **Sharing**, and turn off **Share with public**.
    Note: If you don't want anyone in your ArcGIS Organization, including adults, able to share publicly, instead turn off public sharing for the entire ArcGIS Organization in **Settings > Security** by disabling **Members who are not administrators can make their content, groups, and profile public.**

f. Enable students to hand off and receive content: go to **Role privileges**, expand **General privileges**, expand **Content**, and turn on **Reassign content** and **Receive content**.

g. Disable the ability of students to join external groups: go to **Role privileges**, expand **General privileges**, expand **Groups**, and turn off **Join external groups**.

h. Click **Save**.

7. While on the **Organization > Settings** tab, click **Credits** on the left side of the page. Turn on **Enable credit budgeting tools**. Click **Yes** to continue and enable it if prompted.

8. Set defaults that will be used when adding new members to your organization as follows:

a. While on the **Organization > Settings** tab, click **New member defaults** on the left side of the page.

b. Under **User type and role**, click the edit pencil for **User type** and set it to **Professional Plus**, if available. If not available, set it to **Creator**.

c. Click the drop-down for **Role** and set it to **Student** (the role you created in step 6).

d. Click **Save**.

e. Still on the **Organization > Settings** tab in **New member defaults**, scroll down to the **Credits** section. In the first drop-down, choose **Set allocation to**. Click the pencil for the text box beside it, type **100**, and click **Save**.

4. Create teacher and student accounts

Any teacher or student who wants to save a map needs an ArcGIS account. To create teacher and student accounts, follow the account configuration guidelines below.

When creating student accounts, **do not use any personal information (PI)**. This can mean different things in different countries and districts, so make sure you follow the regulations applicable to your school or district. Don't use student first or last names, or email addresses. For the username, use a student number or other unique identifier already in use at your school that isn't the student's name or information. For an email address, use a teacher or admin email address.

Information to have for each account

Info	Student account value	Teacher account value	Details
Username	studentIDNumber.shortname	surname.shortname	Follow the pattern you defined when activating your ArcGIS organization. For students, use student ID numbers or another unique value that contains no PII.
Email Address	That of a teacher or admin, or none if using SSO.	Teacher's school email address	A student email address is PI and can't be used in student ArcGIS accounts. If using single sign-on (SSO), create the accounts without an email address. If not using SSO, create the accounts using a teacher or adult email, never the student's email.

User type	Professional Plus	Professional Plus	If **Professional Plus** isn't an option, use **Creator.** Available values are determined by your ArcGIS for Schools Bundle license type.
Role	**Student**	**Publisher** (occasionally **Administrator**)	Student accounts all use the **Student** role you created to keep your ArcGIS organization secure. **Student** and **Publisher** accounts can create maps and layers, as well as do analysis. **Administrator** accounts are publishers that can additionally do account management.
Allow Esri Access	**Disabled**	**Enabled**	Grant access to courses on Esri Training and to discussion forums. Only adults are allowed.

Create accounts

Accounts can be created through single sign-on (SSO) or directly in ArcGIS Online.

Create accounts through single sign-on (SSO)

If single sign-on is available in your school or district, use it to create ArcGIS accounts. See K-12 Single Sign-On for ArcGIS Online to configure SSO for ArcGIS.

> **Note**: If you aren't sure, don't worry about this. It is also something you can set up later.

Create accounts directly in ArcGIS Online

If you don't have SSO (or don't plan to set that up now), create accounts directly in ArcGIS Online.

1. Sign in to ArcGIS Online with your ArcGIS account, if you aren't still signed in. To sign in, go to https://**shortname**.maps.arcgis.com (where shortname is your org short name) and follow the prompts to sign in.

2. At the top of the site, click **Organization**, click the **Members** tab, and click **Invite members**.

3. Select **Add members without sending invitations** and click **Next**.

4. If creating 10 or more accounts, create a spreadsheet (CSV file) of the teacher and student accounts you want to create and use it to make the accounts as follows:

   a. Download a template and updated it for your accounts as follows:

      i. Update the **usernames** to match the pattern you are following.

      ii. Use your GIS administrator email address instead of **gisadmin@school.edu** for student email addresses.

      iii. Update student first names to be their student ID numbers. Update student last names to be your organization's shortname.

      iv. Update the teacher email addresses to be their own.

      v. Update the first and last names for teacher accounts to be their own.

   b. On the website, click **New members from a file** and click **Browse**.

   c. Choose the CSV file on your computer.

5. If creating accounts one at a time, create each account as follows:

   a. Click **New member** and fill in the following fields: **First name**, **Last name**, **Email address**, **Username**, and **Temporary password**.
   Note: The user will be prompted to change their password the first time they sign in.

b. Select the appropriate **User type** from the drop-down list.

c. Select the appropriate role for the account.

d. Click **Next**, or, to add more members, click **Next, add another** and repeat this step.
Note: For each account, use the values from the table above and ensure that **student accounts do not use any personally identifiable information (PII)**.

6. Review the member list, verify the information, and click **Next**.

7. In the **Set member properties** panel, set the following:

   a. If only creating teacher (adult) accounts, **Enable Esri Access** (this gives them training resources). If creating teacher and student accounts, **Disable Esri Access** – you will enable it for teacher accounts later.

   b. Click **Next**.

8. Review the summary and click **Add members**.

9. If you created a mix of teacher and student accounts, enable Esri access for teacher accounts as follows:

   a. In the **Organization > Members** tab, find the teacher account that was just created.

   b. Click the **More options** button (the three dots) for the account, click **Enable Esri Access**, and click **OK**.

   c. Repeat for each new teacher account.

Share information with account holders

Share their username and password with each teacher and student. Also share the URL to your organization (for example, https://**shortname**.maps.arcgis.com) so that they know where to go to sign in.

Note: The password you specify during account creation is temporary and the user changes it when they first sign in. Alternately, if you're comfortable using Python, an advanced option is to use a script to reset passwords so that students aren't prompted to change them. See https://esriurl.com/edPasswordReset.

Include restrictions on account use

Remind account holders about restrictions on use. Accounts must be used for K-12 instruction and professional development (PD, informal or formal) in support of that instruction.

Also inform account holders that there are things they should not be mapping. This includes personal information (PI) as defined by COPPA, FERPA, or GDPR (including, but not limited to, first and last name, home addresses, or email address). Uploaded pictures and videos must also be free of PI.

Finally, inform account holders that they must exercise caution when sharing their work publicly, making it available to people outside your organization.

5. Set up another administrator for your subscription (recommended)

Administrators control all permissions and settings of the organization and all accounts that are part of it, and administrative contacts receive communications from Esri. They are often the teachers that want to use the org, district IT personnel, or even GIS advisors helping the school.

By activating the subscription, you are automatically an administrator and an administrative contact. In case one administrator is unavailable, every organization should have at least two administrators who are administrative contacts. Create additional administrator accounts by taking the following steps as many times as needed:

1. Create an account for your additional administrator if they don't yet have one. Do so by following the steps in the previous section. Give them any role as you'll change it after making the account.

2. Enable Esri Access for the account as follows:

    a. In the **Organization > Members** tab, find the account to update.

    b. Click the **More options** button (the three dots) for the account, click **Enable Esri Access**, and click **OK**.

3. Change the role for this account to **Administrator** as follows:

    o   In the **Organization > Members** tab and set the **Role** drop-down to the right of their account to **Administrator**.

4. Make them an administrative contact (sometimes referred to as a primary administrator) so that they receive communications from Esri as follows:

    o   Go to the **Organization > Settings** tab. In **General**, find the **Administrative contacts** section and click **Manage administrative contacts**). Check the box beside their account and click **Save**.

6. Connect with My Esri (recommended)

My Esri (my.esri.com) is a website where you manage software, access support services and training materials, and participate in community forums. By default, ArcGIS accounts are only enabled for ArcGIS Online (arcgis.com), where you work with maps and data. To use the additional resources available through My Esri, you must request permissions.

> **Note**: Permissions on My Esri are required for administrators. They aren't necessary for teacher accounts, nor appropriate for student accounts.

Request permissions for My Esri (my.esri.com), as follows:

1. Sign in to ArcGIS Online with your ArcGIS account, if you aren't still signed in. To sign in, go to https://shortname.maps.arcgis.com (where shortname is your org short name) and follow the prompts to sign in.

2. If connecting your initial account, Esri Access is already enabled. If connecting the account of an additional teacher, enable Esri Access for the account if you haven't already (see step 9 of *Create accounts directly in ArcGIS Online*).

3. While still signed in to ArcGIS Online, go to https://my.esri.com.

4. If prompted to do so, edit your contact info.

5. On My Esri, with the **My Organizations** tab active, click **Request permissions** on the left side of the page.

6. Fill out the form, providing any information you have.

   o Your Customer Number and Organization Name are in the email used to activate your organization.

7. Request all available permissions.

8. Click **Send Request**. You'll get a confirmation email. Esri Customer Service receives your request and helps you get connected.

To request a support case with Esri Support Services, you must be an **authorized caller** for your org. Esri Support services provides technical support, handling both bug reports and help requests. It is best to become an authorized caller now so that

you are ready to put in a request if someone in your org needs Esri Support Services. Become an authorized caller as follows:

1. Go to https://my.esri.com and sign in if you aren't still there and signed in.

2. Click **My Organizations** and make sure your organization is selected in the upper right of the page.

3. Click **Users** and click **Manage Authorized Callers** on the left side of the page. Click **Add Caller**.

4. Choose your name from the list of contacts and provide a Call-in ID (this is a 4-8 digit ID, used like a password). Click **Add Caller**.

5. You are now able to request support cases with Esri Support Services.

Additional resources

1. Looking for full guidance on administration? See Get started with administration of ArcGIS Online.

2. Want more guidance on managing an org for your district? See ArcGIS Organizations for schools and clubs.

3. Stuck and need some help? Email the Esri K-12 Education team at schools@esri.com.