

2.0

Adding users

Introduction

This activity explains how to add additional users to your account, as well as how to best organise your account to ensure all students and teachers can make the most out of your ArcGIS Online Account

Topics covered

- Users and Roles in ArcGIS Online
- Suggested account structure
- Adding users one-by-one
- Adding users in bulk from a CSV file

Users and Roles in ArcGIS Online explained

User roles

For safety and security members of your ArcGIS Online account must be assigned a user role. The user role determines what they can do in ArcGIS Online. There are four common user roles.

- ❖ **Viewers**

Viewers have the lowest privileges. Viewers use and view data, maps, and other items that are shared with them, but cannot create their own content.

- ❖ **Users**

User can share the items they view, create maps and apps.

- ❖ **Publishers**

Publishers are considered the content creators. Publishers typically create and analyse data, maps, and other items.

- ❖ **Administrators**

Administrators are considered the managers. Administrators set up and manage users and content. They invite members to ArcGIS Online and monitor activity.

We recommend the following user roles within your account:

Teachers = Administrators

Students = Publisher

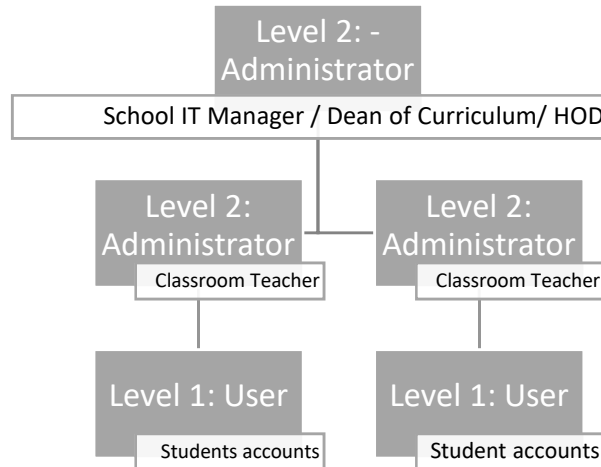
User Levels

- ❖ **Level 1** membership is for members who only need privileges to view content, such as maps and apps, that has been shared with them through the organization, as well as join groups within the organization.
- ❖ **Level 2** membership is for members who need to view, create, and share content and own groups, in addition to other tasks.

As such, we recommend that everyone in your ArcGIS Online School account is given Level 2 privileges, to ensure they can all make and share content – not just ‘view’ it.

Organizing your Schools ArcGIS Online Account

Below is the suggested structure for your School's ArcGIS Online account.



Adding students and teachers to your ArcGIS Online account

To give students and teachers the ability to make, save and share maps, you must add them to your ArcGIS Online account. This means they receive their own unique username and password.

There are 2 ways to invite new members to your group. You can

- Add a new member without sending them an invitation
- Add members and notify them via email

Either option is suitable, however there are several key differences.

Add members without sending invitation	<ul style="list-style-type: none"> Account admin sets an initial password for the member. Members can immediately login using their pre-set username and password. After their initial login, the member will have to customize their password. <p>Recommended for: adding students</p>
Add members and notify them via email	<ul style="list-style-type: none"> Account admin adds a user via their email address. The user receives an email notification, and must respond to a link within the email to set their own password. <p>Recommended for: adding teachers</p>

Account administrators can add new users by following the steps below:

- 1: Go to www.arcgis.com and sign in using your credentials
 - 2: Select the **My Organization** heading
 - 3: Press **Invite Members**
 - 4: Determine which invitation option you would like to use (with or without invitation) then press Next.
- *NB: We recommend adding members without sending invitation.

Option 1: Add members without sending invitations

You can invite users one at a time, or from a file.

A: To add users one at a time, enter their email address and name.

Determine a username for that member, and set a generic password.

Determine appropriate user levels and roles. Then, press NEXT. From here, review and send invitation.

[CANCEL](#)

Step 2 of 4

Add members without sending invitations

You will be setting up the username and password for each member. You will also assign each member a level type and a role that does not have administrative privileges. You must inform the member of their username and password. An invitation email is not sent. If you don't have an email address for a particular member, use an administrator's email address.

One at a time

From a file

Email:

xyz@highschool.qld.edu.au *

First Name:

Sam *

Last Name:

Smith *

Username:

SamS_ *

Password:

***** *

Level:

☐ 1 ☒ 2

Role:

User ▼

BACK

ADD ANOTHER

NEXT

B: Adding users **from a file** lets you easily add multiple users in bulk.


1: Open Microsoft Excel, and format your document with the same column headings below. An example user has been provided in row 2.

	A	B	C	D	E	F	G
1	Email	First Name	Last Name	Username	Password	Level	Role
2	abc@school.com	Adam	Smith	Asmith	Password123	2	user
3							
4							

2: You must save your Microsoft Excel document as a CSV file. Do this by selecting CSV (Comma delimited) (*.csv) from the dropdown option when saving your document.

CSV (Comma delimited) (*.csv)

[More options...](#)

 Save

- When adding students, keep usernames simple – a good option is the students first name, and initial of their surname.
- Give all students the same generic password for simplicity. Each student will have to immediately personalize their password following their first login.

3: Once you have saved your file, in ArcGIS Online select the From a File option to add new users.

One at a time

From a file

Upload a CSV file that contains a list of individuals to establish new ArcGIS member logins for. Note that the CSV file must contain a header (first line) with these field names: Email,First Name,Last Name,Username>Password,Role,Level.

File:

Choose File
 No file chosen

UPLOAD FILE AND REVIEW

4: Select Choose File, and locate the appropriate CSV file document.

5: Select Upload File and Review

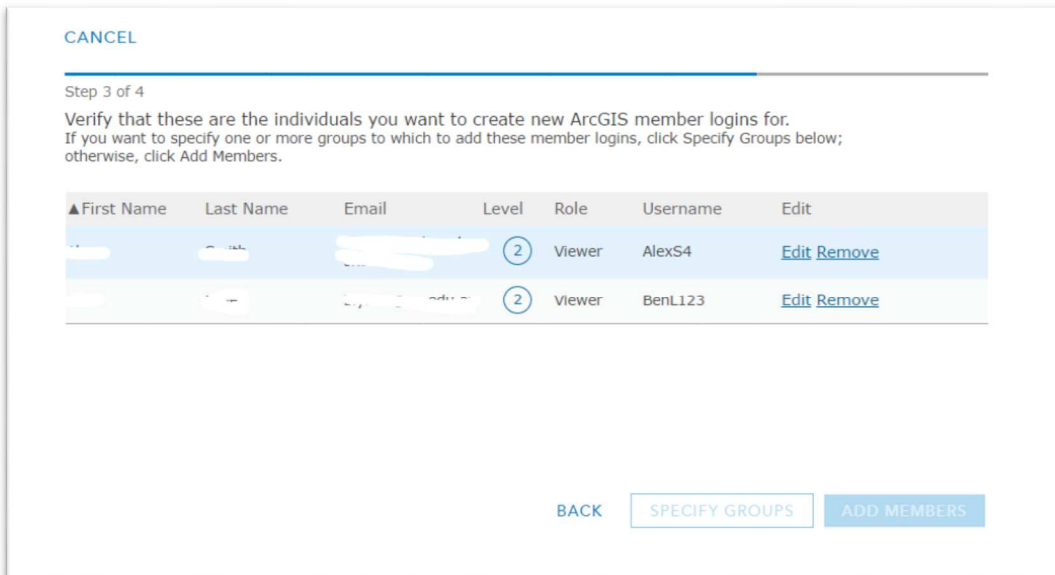
6: Fix any issues, then click NEXT.

7: Complete a final verification all the users you have opted to add from the CSV file.

* Remember that all users should be level 2

* Teachers should be added in the role of Publisher

* Students should be added in the role of User



[CANCEL](#)

Step 3 of 4

Verify that these are the individuals you want to create new ArcGIS member logins for.
If you want to specify one or more groups to which to add these member logins, click Specify Groups below;
otherwise, click Add Members.

▲ First Name	Last Name	Email	Level	Role	Username	Edit
[Redacted]	[Redacted]	[Redacted]	2	Viewer	AlexS4	Edit Remove
[Redacted]	[Redacted]	[Redacted]	2	Viewer	BenL123	Edit Remove

[BACK](#) [SPECIFY GROUPS](#) [ADD MEMBERS](#)

8: If you have created a group for these members, you can select SPECIFY GROUPS and select the appropriate group.

9: When ready, press ADD MEMBERS

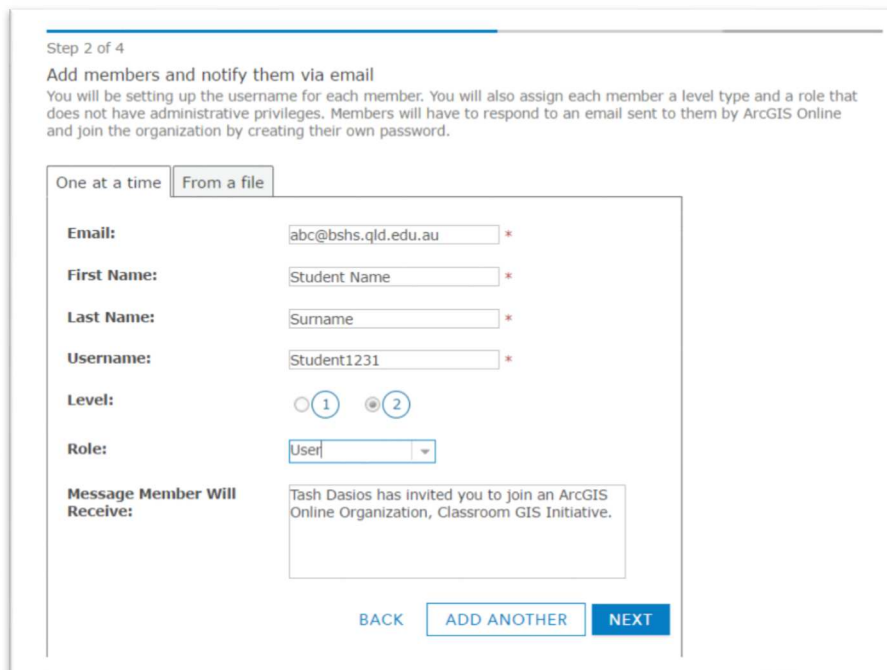
***NB: Those users will now automatically be able to log in, once the administrator tells them their username and password.**

Option 2: Add members and notify them via email

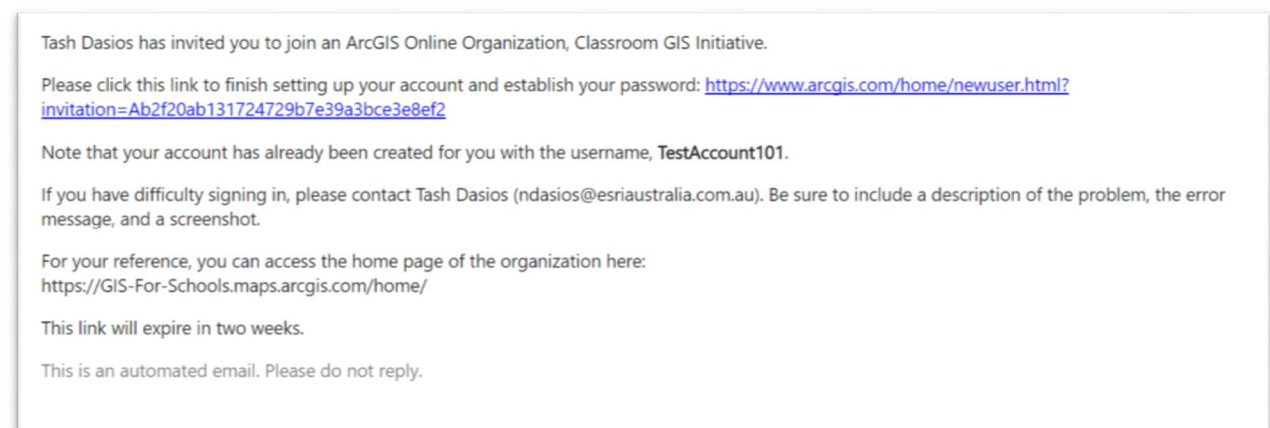
You can invite users one at a time, or from a file.

A: To add users one at a time, enter their email address and name, and determine an appropriate level and role.

- Press NEXT



- From here, the member will receive an emailed invitation titled: 'An Invitation to Join an ArcGIS Online Organisation', followed by the name of your School Organisation



- If that user clicks on the hyperlink, they will be taken to ArcGIS Online to set their own password
- Here, their username, and personal details are visible.

Tash Dasios, welcome to Classroom GIS Initiative

Username: TestAccount101

Email: [REDACTED]

First Name: Tash

Last Name: Dasios

Please provide the following information before getting started.

Set Password:

Re-enter Password:

Security Question: Select your security question.

Answer:

SIGN IN CANCEL

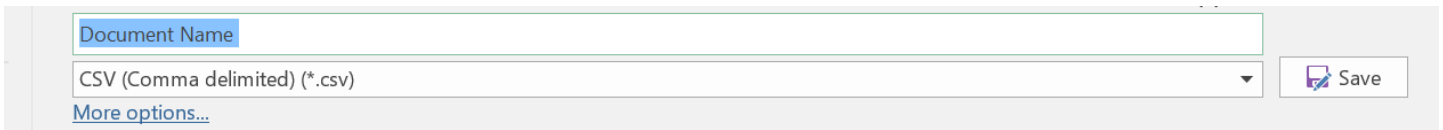
- They must set their password and security question, then press Sign In.
- Their account has now been activated.

B: Adding users from a file lets you easily add multiple users in bulk.

1: Open Microsoft Excel, and format your document with the same column headings below. An example user has been provided in row 2.

	A	B	C	D	E	F
1	Email	First Name	Last Name	Username	Level	Role
2	studenta@school.edu.au	Ben	Smith	BenS	1	User
3	studentb@school.edu.au	Alex	Smith	AlexS	1	User
4						

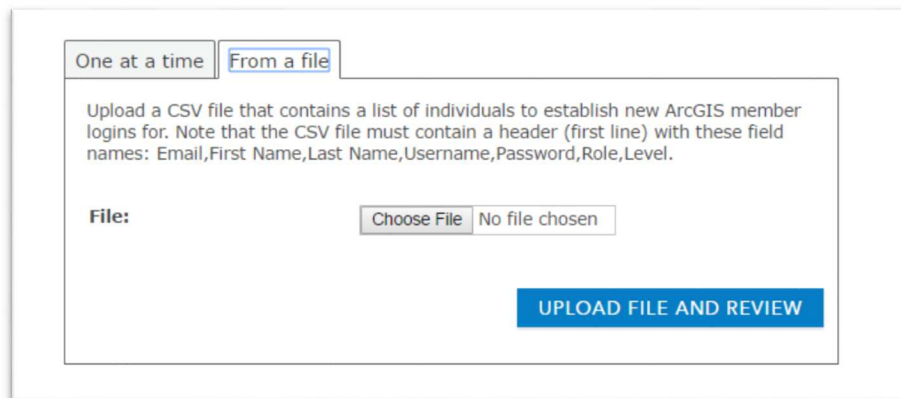
2: You must save your Microsoft Excel document as a CSV file. Do this by selecting CSV (Comma delimited) (*.csv) from the dropdown option when saving your document.



A screenshot of a document saving interface. It features a text input field labeled 'Document Name' with a blue highlight. Below it is a dropdown menu currently showing 'CSV (Comma delimited) (*.csv)'. To the right of the dropdown is a 'Save' button with a floppy disk icon. Below the dropdown is a link that says 'More options...'.

- When adding students, keep usernames simple – a good option is the students first name, and initial of their surname.

3: Once you have saved your file, in ArcGIS Online select the From a File option to add new users.



A screenshot of the 'From a file' upload interface in ArcGIS Online. At the top, there are two tabs: 'One at a time' and 'From a file', with 'From a file' being the active tab. Below the tabs is a text box containing instructions: 'Upload a CSV file that contains a list of individuals to establish new ArcGIS member logins for. Note that the CSV file must contain a header (first line) with these field names: Email,First Name,Last Name,Username>Password,Role,Level.' Below this text is a 'File:' label followed by a file selection button that says 'Choose File' and 'No file chosen'. At the bottom right of the interface is a large blue button that says 'UPLOAD FILE AND REVIEW'.

4: Select Choose File, and locate the appropriate CSV file document.

5: Select Upload File and Review

6: Fix any issues, then click NEXT.

7: Complete a final verification all the users you have opted to add from the CSV file.

- * Remember that all users should be level 2
- * Teachers should be added in the role of Publisher
- * Students should be added in the role of User

8: If you have created a group for these members, you can select SPECIFY GROUPS and select the appropriate group.

9: When ready, press ADD MEMBERS

10: From here, each member will receive an emailed invitation titled: 'An Invitation to Join an ArcGIS Online Organisation', followed by the name of your School Organisation

Tash Dasios has invited you to join an ArcGIS Online Organization, Classroom GIS Initiative.

Please click this link to finish setting up your account and establish your password: <https://www.arcgis.com/home/newuser.html?invitation=Ab2f20ab131724729b7e39a3bce3e8ef2>

Note that your account has already been created for you with the username, **TestAccount101**.

If you have difficulty signing in, please contact Tash Dasios (ndasios@esriaustralia.com.au). Be sure to include a description of the problem, the error message, and a screenshot.

For your reference, you can access the home page of the organization here:
<https://GIS-For-Schools.maps.arcgis.com/home/>

This link will expire in two weeks.

This is an automated email. Please do not reply.

- If that user clicks on the hyperlink within the email, they will be taken to ArcGIS Online to set their own password
- Here, their username, and personal details are visible.
- The user can set their own password and security question, then Sign In.
- Once they Sign In, the account will be active

Tash Dasios, welcome to Classroom GIS Initiative

Username: TestAccount101

Email: [REDACTED]

First Name: Tash

Last Name: Dasios

Please provide the following information before getting started.

Set Password:

Re-enter Password:

Security Question:

Answer:

SIGN IN

CANCEL