

ArcGIS for Schools Bundle Administration Guides

Welcome

On behalf of the teachers and students you are supporting, thank you for requesting and managing an [ArcGIS for Schools Bundle](#). An ArcGIS for Schools Bundle enables map making as part of the instruction of K-12 students. It includes accounts on ArcGIS Online, a web offering that enables teachers and students to create items including maps, data and layers, StoryMaps, and apps.

This document describes setup and management processes for the people responsible for maintaining an ArcGIS for Schools Bundle. It contains two guides:



Guide A – Quick Start

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.



Guide B – Organization Management

This guide describes management processes used by people responsible for maintaining the ArcGIS for Schools Bundle. It takes you through managing ArcGIS Online accounts and items, including when and how to disable and delete accounts, and delete and store items. It enables you to keep your ArcGIS organization orderly as it grows in accounts and items, and ensures the right people have access and the right content is stored.

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 does **NOT** cover ArcGIS Pro. ArcGIS Pro, also included with the ArcGIS for Schools Bundle, is installed mapping software which more advanced users may require. If your teachers or students require ArcGIS Pro, see [Install ArcGIS Pro](#).

This guide is **NOT** instructions for making maps or using ArcGIS Online or ArcGIS Pro. It is only about management of your ArcGIS organization and its accounts and items.

An important note on personally identifiable information (PII) requirements

As you manage 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)**. You must not provide any student information that COPPA, FERPA, or GDPR defines as PII (including, but not limited to, first and last name or email address). See the [ArcGIS Trust Center](#).

Replacing the ArcGIS Orgs for Schools PDF of slides

You may be familiar with the ArcGIS Orgs for Schools PDF. That document is superseded by this guide. The page numbers you referenced in the ArcGIS Orgs for Schools PDF won't match the page numbers of where information is in this guide. If there is information that you used in the previous PDF that you are struggling to find here, email us at schools@esri.com and we'll help you find it.

Guide A – Quick Start

This guide takes you through setting up your ArcGIS organization and creating secure accounts for your teachers and students. You'll complete the following tasks:

TASK	COMPLETE
1. Activate your ArcGIS Online subscription	<input type="checkbox"/>
2. Secure your organization	<input type="checkbox"/>
3. Create teacher and student accounts	<input type="checkbox"/>
4. Connect with My Esri (recommended)	<input type="checkbox"/>
5. Set up another administrator for your subscription (recommended)	<input type="checkbox"/>



1. Activate your ArcGIS Online subscription

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

- One has the subject “Activate Your ArcGIS Online Subscription”
- One has your order number and “ArcGIS for Schools” in the subject line
- One has “Connect to <your district> on My Esri” in the subject line

Start by using the email with the subject “Activate 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**.
- 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**.

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. 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 **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 Drone2Map, choose **Professional Plus**. If you don't see **Professional Plus** user types and you need the advanced GIS applications, email schools@esri.com to upgrade your bundle. You can change the user type at any time after the account is created.

- 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.

2. 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](https://shortname.maps.arcgis.com) (where **shortname** is your organization 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**, disable "Allow anonymous access to your organization's website" and "Allow members to edit biographical information and who can see their profile."
5. Under **Sharing and searching**, disable "Show social media links on item and group pages."
6. Under **Logins**, disable "Social logins."
7. 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. Don't allow public sharing for student accounts: go to **Role privileges**, expand **General privileges**, expand **Sharing**, and disable **Share with public**.
 **Note:** If you don't want anyone in your ArcGIS Organization, including adults, able to share publicly, instead disable 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. Allow students to hand off and receive content: go to **Role privileges**, expand **General privileges**, expand **Content**, and enable **Reassign content** and **Receive content**.
 - g. Don't allow students to join external groups: go to **Role privileges**, expand **General privileges**, expand **Groups**, and disable **Join external groups**.
 - h. Click **Save**.

8. While on the **Organization > Settings** tab, click **Items** on the left side of the page. Disable **Comments > Show and allow comments on items in the organization**.
9. 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.
10. 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 **Creator**.
 - c. Click the drop-down for **Role** and set it to **Student** (the role you created in step 7).
 - 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**.



3. 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 personally identifiable information (PII)**. 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 unique identifier, ideally one 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	uniqueValue. shortname	surname. shortname	Follow the pattern you defined when activating your ArcGIS organization. For students, use a unique identifier that contains no PII (for example, a random number).
Email address	That of a teacher or admin, or none if using SSO.	Teacher's school email address	A student email address is PII 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	Creator	Creator	If you need advanced GIS applications like ArcGIS Drone2Map, use Professional Plus instead of Creator . If you need Professional Plus and it

			isn't an option, email schools@esri.com to upgrade your bundle. You can change the user type later.
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, recommended) or directly in ArcGIS Online.

Create accounts through single sign-on (SSO, recommended)

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](https://shortname.maps.arcgis.com) (where **shortname** is your organization 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:
 Note: A spreadsheet supports up to 200 accounts in a single file.
 - a. [Download a template](#) and update it for your accounts as follows:
 - i. Update the **usernames** to match the pattern you are following.
 - ii. Use your GIS administrator email address or a teacher email instead of **gisadmin@school.edu** for student email addresses.
 - iii. Update student first names to be their unique identifier. 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.

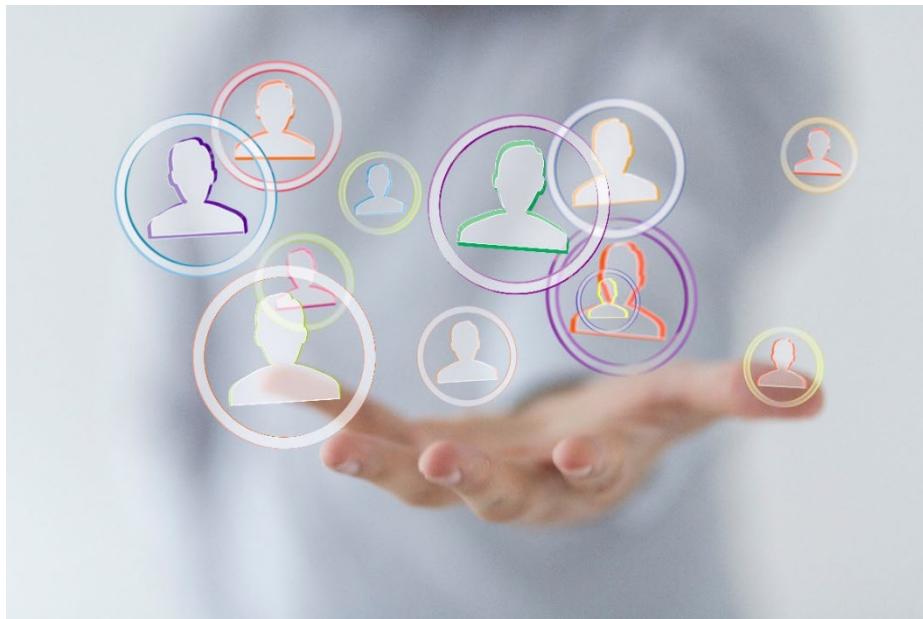
 Note: The password you specify during account creation is temporary and the user changes it when they first sign in. Alternately, if you're comfortable using Python, an advanced option is to use a script to reset passwords so that students aren't prompted to change them. See <https://esriurl.com/edPasswordReset>.

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.



4. 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 for My Esri. You'll use the email titled "Connect to <your district> on My Esri" that you got from Esri when you got your bundle.

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

Connect to My Esri (my.esri.com)

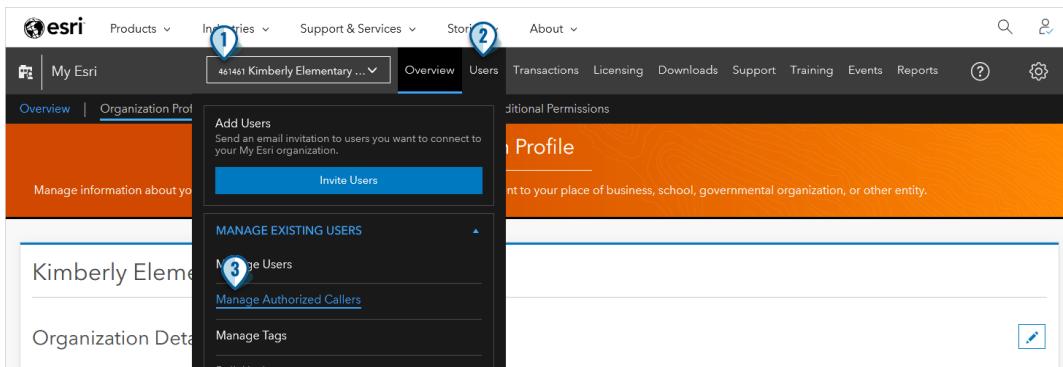
1. Sign in to ArcGIS Online with your ArcGIS account, if you aren't still signed in. To sign in, go to [https://**shortname**.maps.arcgis.com](https://shortname.maps.arcgis.com) (where **shortname** is your organization short name) and follow the prompts to sign in.
Note: Your initial account has Esri Access already enabled. This is required for connecting to My Esri.
2. While still signed in to ArcGIS Online, go to <https://my.esri.com>.
3. Open the email titled "Connect to <your district> on My Esri" that you received from Esri when you got your bundle.
4. Click **Connect to My Esri**.
5. If prompted to do so, update your profile information.

You are now connected and ready to use My Esri.

Become an authorized caller

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 organization needs Esri Support Services.

1. Go to <https://my.esri.com> and sign in if you aren't still there and signed in.
2. Make sure your organization is selected in the drop-down in the gray banner at the top of the page.
3. Click **Users** in the gray banner and click **Manage Authorized Callers**.



4. Click **Add Caller**.
5. Choose your account 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**.
6. You are now able to request support cases with Esri Support Services.



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 and member support requests. They are often the teachers that want to use ArcGIS Online, 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 [Create accounts](#) above. 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:
 - a. 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 and member support requests as follows:
 - a. 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**.
5. If the new administrator needs to be able to work with Esri Support Services (tech support), connect them to your organization in My Esri and add them as an authorized caller as follows:
 - a. Go to <https://my.esri.com> and sign in if you aren't already. Verify that your organization is selected in the drop-down in the gray banner.
 - b. Click **Users** in the gray banner and click **Invite Users**.
 - c. Enter the new admin's email address in **Email Addresses to Invite** and click **Add email**.

- d. Enable the permissions to **View technical support information** and **Take authorized caller actions**. Provide their name and a 4-8 digit call-in ID (used like a password).
- e. Click **Send invitation**.
- f. The new admin must then sign in to <https://my.esri.com> with their new account, then check their email and click the “Connect to My Esri” button in the email.

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



Note: A user doesn't have to be an administrator to be an authorized caller. You use these steps to invite other ArcGIS users to connect to My Esri and grant them the ability to work with Esri Support Services.

Guide B – Organization Management

This guide takes you through managing your ArcGIS organization, including regularly reviewing and acting on your **accounts** (users) and **items** (content) to keep them relevant and organized. To manage your organization, regularly complete the following tasks:

 **Note:** Both ArcGIS **users** and ArcGIS **admins** have roles to play.

TASK	COMPLETE
0. Set up the tools and accounts used in management (one-time step)	<input type="checkbox"/>
1. Manage items Done by users and admins ; using a “ showcase ” account	<input type="checkbox"/>
2. Manage accounts Done by admins ; using a “ storage ” account	<input type="checkbox"/>
3. Review and update ArcGIS administrators	<input type="checkbox"/>



Examine, Decide, Do

This guide uses an “Examine, Decide, Do” methodology. It provides steps and considerations, along with recommendations, but some decisions about how to manage the users and content need to be made by you and your district or school.

0. Setup the tools and accounts used in management (one-time step)

In managing the accounts and content, you'll use some specific tools and accounts. The tools help your management efficiency, and the accounts allow you to share and keep items of interest, even if the accounts that created them go away.

Install and use Admin Tools by Geo Jobe

Geo Jobe makes a collection of admin tools which make managing your ArcGIS organization easier.



Install the Admin Tools

Install these tools for your organization as follows:

1. Sign in to your org.
2. In the navigation at the top of your ArcGIS Online organization, click “**Groups**.”
3. In the **Groups** page, click “**Create group**” and make a group named “**Admin tools**” – set it to viewable by “**All organization members**” and accept the other defaults. Click **Save** to create the group.
4. Go to [the ArcGIS Marketplace listing for the Admin Tools for ArcGIS Online, created by Geo Jobe GIS Consulting](#) and click “**Get it now.**”
5. Fill out the form and click “**Submit.**”
6. Refresh the ArcGIS Marketplace listing and click “**View item**” to see the item page for the tools.
7. On the item page, click “**Share.**” In the **Share** dialog, click “**Edit group sharing**,” click the checkbox for your new **Admin Tools** group, click **OK**, and click **Save**.

The Geo Jobe tools are now available through your organization.

Open and sign in to the Admin Tools

To open and sign in to the Admin Tools, do the following:

1. In ArcGIS Online, go to the Admin Tools group containing the Geo Jobe tools.
2. Click on the Admin Tools, and from its item page, click **View**.
3. Sign in to the Admin Tools if you aren't already signed in.

Create a Showcase account

Use a **Showcase account** to hold publicly shared items (maps, apps, data, StoryMaps, etc.). Using an adult-managed account for public sharing better protects student privacy. Moving an item also ensures students don't make changes to it while it is shared.

[Create accounts directly in ArcGIS Online](#) that will own and share the items. Use the following properties:

Property	Value to use
First name	Showcase
Last name	District or school name or abbreviation <i>Ex: Orange Tree Unified School District would use OTUSD</i>
Email address	The email address used by your ArcGIS organization admins
Username	Use the format “ showcase.shortname ” where shortname is the short name for your ArcGIS organization. <i>Ex: Orange Tree Unified School District (https://otusd.maps.arcgis.com) would use showcase.otusd</i>
User type	Creator If it is not available, Professional Plus
Role	Publisher
Temporary password	Provide a password that meets requirements; it will be changed the first time the account is logged in to.

 **Note:** In addition to having a showcase account, don't give students the permission to share publicly (see [Secure your organization](#) in Guide A – Quick Start for how to create a custom student roll with custom permissions). Before sharing publicly, make sure items are free of student PII.

 **Tip:** Fill out the profile for the Showcase account. It is displayed when readers viewing shared content click on the username to learn about who made it.



Create a **Storage** account

Use a **Storage account** to hold items (StoryMaps, apps, maps, and data) you want to preserve when the owner's account is removed.

[Create accounts directly in ArcGIS Online](#) that will own the items. Use the following properties:

Property	Value to use
First name	Storage
Last name	District or school name or abbreviation <i>Ex: Orange Tree Unified School District would use OTUSD</i>
Email address	The email address used by your ArcGIS organization admins
Username	Use the format “ storage.shortname ” where shortname is the short name for your ArcGIS organization. <i>Ex: Orange Tree Unified School District (https://otusd.maps.arcgis.com) would use storage.otusd</i>
User type	Creator If it is not available, Professional Plus
Role	Publisher
Temporary password	Provide a password that meets requirements; it will be changed the first time the account is logged in to.



1. Manage items

Both users and admins are responsible for managing the items in the organization. This includes all the types included in Content, including maps, apps, data, and StoryMaps. Storing items takes **credits**. Think of credits as the currency of ArcGIS Online. To minimize “spending” you’ll want to make sure the content you store is useful.

Users (teachers and students) are responsible for managing their own content.

 **Recommendation:** Perform item management at the end of each project.

Admins (district IT and teachers) are responsible for managing all the content in the organization.

 **Recommendation:** Perform item management at the end of the semester or school year. Elementary school admins often do so at the end of each year, while middle and high school admins do so at the end of each semester.

Item management process

Go through the following process to manage items:

1. Examine items

- [Manually identify items to review](#)
- [Use reports and status to identify items to review \(admins\)](#)
- Ask the following questions:
 - What is still needed? Pay extra attention to large feature services
 - What stellar items should be shared with a larger audience, or even publicly?
 - Evaluate sharing – do other users still need access to shared items? Are they shared with the smallest group of people that need access?

2. Decide what is no longer needed and who needs access to items that will remain.

3. Do

- [Delete items](#) that are no longer needed
- [Unshare items](#) no one else needs (or share with a smaller set of people) by setting the sharing back to **Owner** and removing all group sharing
- [Protect important items from deletion](#)
- **Admins and teachers:** [Move stellar items into the showcase account and share them publicly](#)

2. Manage accounts

Admins are responsible for managing the accounts in the organization. This includes creating and deleting accounts for teachers and students.

 **Recommendation:** Perform account management at the end of the school year, or when a student leaves the school.

Account management process

Go through the following process to manage items:

1. Examine accounts

- [Manually identify accounts to review](#) – filter or sort the **Members** list by last login to find accounts that haven't been used recently (or ever)
- [Use reports to identify accounts to review](#)
- Ask the following questions:
 - Who (teachers and students) is still at the school?
 - What accounts are active?
 - What accounts hold content?
 - Are there items you want to keep that are owned by accounts that are no longer needed?

2. Decide what accounts are longer needed and how to handle them

- Will you disable (turn off access to) accounts, delete them (remove them completely), or a combination of the two?
 **Recommendation:** Disable their account when a student leaves. Delete disabled accounts once their items are reviewed and either moved (to a **showcase** or **storage** account) or deleted.
- How will you handle items in the accounts you are deleting? Will you archive the items, delete them, or a combination of the two?

3. Do

- [Disable accounts](#) if their items still need review
- Prepare accounts for deletion by doing the following:
 - [Turn off Esri Access](#)
 - [Move items that should be preserved into the **storage** account](#)
 - [Delete other items](#) (the same way you do when managing items)

 **Note:** When you delete an account, you can either move its items to a new account or delete its items as part of the account deletion process.



Recommendation: If you need to move some items and delete others, do the task (either moving items or deleting items) that applies to fewer items before you delete the account. Do the other task (either moving or deleting) that applies to more items as part of deleting the account.

- **Delete accounts** that are no longer needed



Note: If using SSO, when you delete an account from your identity provider, it doesn't delete the ArcGIS Online account. You also need to delete the ArcGIS account to avoid orphaned accounts.



3. Review and update ArcGIS administrators

Administrators control all permissions and settings of the organization and all accounts that are part of it, and administrative contacts also receive communications from Esri and member support requests. They have experience with managing software and accounts, and ideally experience with ArcGIS Online.

Every organization should have at least two administrators and at least two administrative contacts (every administrative contact is also an administrator). Each time an administrator leaves the school, someone to replace them should be identified.

 **Recommendation:** Review administrators at the start and end of each school year, or when an admin's role changes.

Administrator management process

Go through the following process to manage administrators:

1. Examine current ArcGIS Online admins

- [Manually identify accounts to review](#) – filter the **Members** list by Role, choosing the **Administrator** role
- Ask the following questions:
 - Who is still at the school?
 - Who still makes sense as an admin?
 - Are there other people who should be admins and aren't currently?

2. Decide how to handle past admin accounts

- Will you demote the account to a non-administrator role? Disable (turn off access to) accounts? Delete them (remove them completely)? You might have a different answer for each existing admin account.

 **Recommendation:** Demote accounts for people still in the district but no longer needing administrator privileges. Disable accounts where the person has left the district but has items that need to be reviewed. Delete accounts that don't have items.

3. Do

- [Create accounts for new admins](#) that don't yet have them
- [Change the role to administrator](#) for accounts of people being promoted to admins
- [Add new and promoted admins as administrative contacts](#) (as appropriate)
- [Remove past admins from administrative contacts](#)

- [Change the role from administrator](#) to a new role for accounts of previous admins that still need accounts
- Prepare for deletion then delete the accounts of past admins who have left the district or school (the same as you do any account):
 - [Disable their account](#) to remove access
 - [Turn off Esri Access](#)
 - [Move items that should be preserved into the **storage** account](#)
 - [Delete other items](#)
 - [Delete the account](#)
- Verify that you still have at least 2 admins, and at least 2 administrative contacts. If not, consider who you can promote and do so – having at least 2 admins and 2 administrative contacts is strongly recommended to keep your ArcGIS organization accessible.

 **Tip:** To verify, first filter the members list by **Role: Administrator** and make sure at least two accounts display. Then look at **Organization > Settings > General > Administrative contacts** and make sure at least 2 accounts are listed.



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Appendix A – Additional resources

1. Looking for full guidance on administration? See [Get started with administration of ArcGIS Online](#).
2. Stuck and need some help? Email the Esri K-12 Education team at schools@esri.com.
3. Need to review the terms and conditions of your software? Start with the [ArcGIS School Bundle Summary](#).

Appendix B – Recommended Settings

This appendix documents the full recommended settings for your organization. Compare your organization's settings to the ones here to ensure you are in compliance with Esri's recommendations for K-12 organization that includes minors as account holders.

 **Note:** The [Guide A – Quick Start](#) covers the changes to make for compliance when setting up your organization but doesn't include the recommended value for each setting, as this appendix does. Here, you'll find the value for each setting that is part of operating a K-12 organization in compliance with privacy and security settings recommended by Esri, including those whose default value is the recommendation.

Organization settings

Configure these key settings for your organization to ensure smooth operation and protect student privacy.

You can review and edit your org's settings by selecting **Organization** in the navigation at the top of your ArcGIS Online organization, choosing **Settings** in the blue bar, and then clicking on the tab on the left of the screen that corresponds to the settings you want to review.

Tab	Setting	Value
General	Contact link (optional)	Email alias used by your organization admins
	Administrative contacts	Have at least 2 listed
	Esri User Experience Program > Send anonymous usage data (optional)	✓
Map and scene	Primary map viewer	Map Viewer
	Basemap gallery for maps and scenes > 3D Group > Use 3D Basemaps	✓
Items	Comments > Show and allow comments on items in the organization	Disabled
	Recycle bin	Opt in (when opted in, it shows a button to "Opt out of the recycle bin")
New member defaults	User type and role > User type	Creator
	User type and role > Role	Student
	Credits > Set allocation to	100
	Esri access > Enable Esri access	Disabled

Credits	Credit allocation > Enable credit budgeting tools	✓
	Credit allocation > Show each member's available credits on their settings page	✓
Security	Policies > Access and permissions	All settings in this section are disabled
	Policies > Sharing and searching > Members who are not administrators can make their content, groups, and profile public Note: The ability to share publicly is restricted for students but left enabled here to allow teacher sharing.	✓
	Policies > Sharing and searching > Members can search for content outside their organization	✓
	Policies > Sharing and searching > Show social media links on item and group pages	Disabled
	Logins > ArcGIS login	✓
	Logins > Social logins	Disabled
	Multifactor authentication > Enabled MFA for organization	Disabled
	Email verification > Always prompt email verification for members with unverified email addresses	Disabled

 **Recommendation:** Since SSO uses the new member defaults for all accounts, default to the most restrictive user type and role. Automate updating accounts settings for different types of users. For example, run a daily script to check new accounts for a known email address format specific to teachers and, when found, update their accounts to a different role.

Student role privileges

For the custom student role, created in [Secure your organization](#), step 7, the privileges should match what is presented in this section.

You can review and edit a role's privileges by selecting **Organization** in the navigation at the top of your ArcGIS Online organization, choosing **Settings** in the blue bar, clicking **Member**

roles in the left tabs, clicking the three dots beside the role you want to review (in this case, *Student*), and selecting **Edit**.

Once editing the role, review the **Role privileges > General privileges** section and make sure each section matches the following:

Members	(1 of 1 enabled)
View	✓

Groups	(3 of 6 enabled)
Create, update, and delete	✓
Join organizational groups	✓
Join external groups	-
View groups shared with organization	✓
Invite partnered organization members	-
Add members from other organizations	-

Content	(5 of 15 enabled)
Create, update, and delete	✓
Publish hosted feature layers	✓
Publish hosted tile layers	-
Publish hosted scene layers	-
Publish hosted tiled imagery layers	-
Publish hosted dynamic imagery layers	-
View content shared with organization	✓
Create and edit notebooks	-
Schedule notebooks	-
View location tracks	-
Reassign content	✓
Receive content	✓
Create and run data pipelines	-
Generate API keys	-
Assign privileges to OAuth 2.0 applications	-

Sharing	(2 of 5 enabled)
Share with groups	✓
Share with organization	✓
Share with public	-

Make groups visible to organization	-
Make groups visible to public	-

Premium Content and Services (6 of 9 enabled)	
Geocoding	✓
Network Analysis	✓
Spatial Analysis	✓
GeoEnrichment	✓
Demographics	✓
Imagery Analysis	-
Advanced notebooks	-
Run web tools	-
Feature report	✓

Features (1 of 2 enabled)	
Edit	✓
Edit with full control	-

In the **Role privileges > Administrative privileges** section, all privileges should be disabled for the custom Student role.

Appendix C – Steps for Common Management Tasks

This appendix contains step-by-step instructions for completing management tasks – the “how do I do it?” information.

Knowing what tasks to do, and when, is covered in the main part of this guide and not this appendix. The references to the tasks in the main guide link to the appropriate steps that are in this appendix.

Item management task steps

In managing items, there are a few tasks you take. Here are the details of how to do them.

Manually identify items to review

The first step in managing items is identifying the items that need management. By regularly reviewing it, you can use your familiarity to quickly find and evaluate items stored in your account and organization. There are a couple of ways to locate content to review:

- **(Users)** Go through the content you have in your account, using **My content**.
- Search for content you know you have finished working with, and other temporary content.
💡 **Tip:** Search for words like demo, test, delete, blah, and asdf to find unnecessary items.

Use reports and status to identify items to review (admins)

When reviewing content, focus on the largest items first since they use the most credits. Also review items that are old or not often used.

Admins can use the ArcGIS Online **Status** tab and **reports** to help identify items. The ArcGIS Online **Status** tab shows large items, creation, and modification dates. **Reports** provide not only size and date information, but also views (how often an item is accessed).

Find large items through the ArcGIS Online Status tab

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Status**.
2. Scroll down to the **Usage Aggregation by Type** chart. Click **Storage** (in the ring or legend) and click **Feature Storage** (in the ring or legend).
3. In the table below the chart, click the line for **Standard Feature Data Store** and click the blue **View item details** button below the table.
4. While the table is sorted by size by default, you can click a header (such as **Size**, **Created**, or **Modified**) to sort the table on that property.

5. Click on an item in the **Database Storage Details** to see its item page. You can read more about it and manage the item, including moving or deleting it.

 **Note:** The size reported here includes both features and attachments.

Feature storage costs more credits than attachment storage, so the largest item in this list might not be the largest credit consumer. Using a report (covered in the next section) and the feature storage size more accurately finds the biggest credit consumers, but reviewing in the Database Storage Details still helps clean up large unnecessary items.

Get an item report spreadsheet including size, views, creation date, and modification date

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Status**.
2. In the tabs at the top of the **Status** page, click **Reports**.
3. Click **Create report**, choose **Single report**, and create a report of type **Item**.
4. Once the report is created, download and open the spreadsheet.
5. With the spreadsheet open, you can sort it by the columns for date created, date modified, view counts, file storage size, feature storage size, and date last viewed to find the items you need to review.

 **Tip:** Feature storage costs more credits than file storage. Sort by feature storage size to find the services that consume the most credits.

6. To review an item, copy its **Item ID** from the spreadsheet and paste it into the search in ArcGIS Online. On the search result, click **More Options** (the three dots), and click **View details** to see its item page. You can read more about it and manage the item, including moving or deleting it.

Delete items

Items that aren't needed should be deleted.

 **Note:** When an item is deleted, it is deleted completely. If it is used by another item, the item that references it will no longer work correctly. For example, if you delete a layer, a map using that layer will no longer display it. If you delete a map that is used by an app, the app may no longer work.

 **Tip:** If you are deleting the account that owns the items, you can delete the items when deleting the account. However, you must handle all items the same way when deleting the account: either deleting all items or moving all items to a different account.

How you delete items depends on the items you need to delete. This section includes recommendations for the following cases:

- [Deleting a single item](#)
- [Deleting multiple items owned by a single account](#) (such as your own)
- [Deleting items from multiple accounts](#) (if you are an admin; uses Geo Jobe Admin Tools)

 **Note:** If any of the items have deletion management enabled, you'll need to either delete them one at a time or use the Geo Jobe Admin tools (as described in Delete items from multiple accounts).

Delete a single item

An item can be deleted through its item page by its owner or an admin as follows:

1. Go to its item page and click **Settings**.
2. If **Deletion management** is enabled, disable it.
3. Click **Delete Item**.

Delete multiple items owned by a single account

Items owned by the same account can be deleted by the owner of the items or by an admin as follows:

 **Tip:** If you are deleting items that might have deletion management enabled, use the Geo Jobe Admin Tools. They handle content with deletion management enabled while the built-in ArcGIS Online tools require deletion management be disabled before deletion.

1. Get to the items in one of the following ways:
 - a. If you are the **owner**, go to **Content** and choose the **My content** tab.
 - b. If you are an **admin**, go to **Organization > Members** and find the member who owns them. Click on the three dots to the right of the members' name and choose **Manage items**.
2. If the items are in multiple folders, go to the **All my content** folder (if you are the owner) or the **All of <username's> content** folder (if you are an admin) in the folder list to the left. If in a single folder, browse to that folder.
3. In the list of items, check the box for all the items you want to delete.
4. Click **Delete** above the table.
5. Review the notes. Make note of any content with deletion management enabled as it won't be deleted and will need to be handled separately.
6. Click **Delete**.

Delete items from multiple accounts (admins)

Administrators can use the Admin Tools by Geo Jobe to delete items as follows:

1. [Open and sign in to the Admin Tools.](#)
2. Click the **Items** tab and click **Delete Items**.
3. Review the filters applied to the item list. Remove any you don't want by clicking the red X beside the filter.
4. Click the blue + button above the table to filter for the items you want to manage, enter a query, and click the green checkmark to run it.

For example, the query in the image below shows items that include “test” in the title:

5. Check the boxes to the left of the items you want to move and click **Next**.
6. Choose if you want the content deleted even if it has deletion management enabled (choose **Force** if you know you want the item deleted despite the item's settings).
7. If asked, choose if you want the content to be moved to the recycle bin or deleted permanently (choose **Move to recycle bin** if you want a couple of weeks where you could restore the items).
8. If asked, choose if you want items that can't be moved to the recycle bin to be skipped or deleted permanently.
9. Click **Next**, review the changes, and click **Run Tool**.
The items are deleted or moved to the recycle bin, as you specified.
10. Click **Back to Tools** to exit the **Delete Items** tool.

Update item sharing

Item sharing can regularly be evaluated and updated. Items should be shared with others who need access. Once an item is no longer useful and others no longer need access, it should be unshared.

How you update item sharing depends on the items you need to update. This section includes recommendations for the following cases:

- [Updating the sharing of a single item](#)
- [Updating the sharing of multiple items owned by a single account](#) (such as your own)
- [Updating the sharing of items owned by multiple accounts](#) (if you are an admin; uses Geo Jobe Admin Tools)

Update the sharing of a single item

If others need access to an item, or no longer need access to it, change the item's sharing as follows so that only people who need access are granted it:

1. Go to its item page and click **Share**.
2. Change the sharing level to those users who need access.
💡 **Tip:** When an item no longer needs to be shared, set its sharing level to **Owner**.
3. Click **Edit group sharing** and select and unselect groups that it is shared with. Click **Apply**.
💡 **Tip:** Always share with the fewest groups that need access. When an item no longer needs to be shared, remove the group sharing from all groups it is shared with.
4. Click **Save**.

Update the sharing of multiple items owned by a single account

If others need access to multiple items, or no longer need access to them, change the sharing of all the items as follows so that only people who need access are granted it:

1. Get to the items in one of the following ways:
 - a. If you are the owner, go to **Content** and choose the **My content** tab.
 - b. If you are an admin, go to **Organization > Members** and find the member who owns them. Click on the three dots to the right of the members' name and choose **Manage items**.
2. If the items are in multiple folders, go to the **All my content folder** (if you are the owner) or the **All of <username's> content** folder (if you are an admin) in the folder list to the left. If in a single folder, browse to that folder.
3. In the list of items, check the box for all the items you want to change the sharing on.
4. Click **Share** above the table.
5. Change the sharing level to those users who still need access.
💡 **Tip:** When the items no longer need to be shared, set their sharing level to **Owner**.
6. If shared with one or more groups, click **Edit group sharing** and change the groups the items are shared with to users who still need access.
💡 **Tip:** Always share with the fewest groups that need access. When items no longer need to be shared, remove the group sharing from all groups they are shared with.
7. Click **Save**.

Update the sharing of items owned by multiple accounts (admins)

Administrators can use the Admin Tools by Geo Jobe to update the sharing of items as follows:

1. Open and sign in to the Admin Tools.

2. Change the sharing level (public, organization, or private) as follows:
 - a. Click the **Items** tab and click **Update Items Sharing Properties**.
 - b. Review the filters applied to the item list. Remove any you don't want by clicking the red X beside the filter.
 - c. Click the blue + button above the table to filter for the items you want to manage, enter a query, and click the green checkmark to run it.

For example, the query in the image below shows items that include “final” in the title:



A screenshot of a search interface. It shows a search bar with the text "final" and a dropdown menu above it with the option "contains (partial)". To the right of the search bar are two buttons: a green checkmark button and a red X button.

- d. Check the boxes to the left of the items you want to change the sharing of and click **Next**.
 - e. Choose the sharing you want for the item. (Choose **Public** if it should be accessible by people without accounts.)
 - f. Click **Next**, review the changes, and click **Run Tool**.
The items have their sharing updated, as you specified.
 - g. Click **Back to Tools** to exit the **Update Items Sharing Properties** tool.
3. Update the groups with which the items are shared as follows:
 - a. Click the **Items** tab and click **Share Items with Groups** or **Unshare items with Groups**, based on which you'd like to do.
 - b. Select the items you want to change the sharing of the same way as you did in the previous step, b-d, and click **Next**.
 - c. Select the group you'd like to share the items with (or remove the items from).
 **Tip:** You can filter the list of groups the same as you did the list of items.
 - d. Click **Next**, review the changes, and click **Run Tool**.
The items have their sharing updated, as you specified.
 - e. Click **Back to Tools** to exit the **Share or Unshare Items with Groups** tool.

Protect important items from deletion

To prevent items that are important from accidental deletion, enable deletion management. You can enable it on a single item in ArcGIS Online or in bulk with the Geo Jobe Admin Tools.

Protect a single item from deletion

For a single item, enable deletion management as follows:

1. Go to its item page and click **Settings**.

2. Enable **Deletion management**.

3. Click **Save**.



Tip: Also protect supporting items – for example, if you enable deletion management on a StoryMap, also enable deletion management on the maps, data/layers, apps, etc. that it references.

Protect multiple items from deletion (admin)

Use the Geo Jobe admin tools to enable deletion management on multiple items at a time (to protect them from deletion) as follows:

1. [Open and sign in to the Admin Tools](#).
2. Click the **Items** tab and click **Update Items Delete Protection**.
3. Review the filters applied to the item list. Remove any you don't want by clicking the red X beside the filter.
4. Click the blue + button above the table to filter for the items for which you want to enable deletion management, enter a query, and click the green checkmark to run it.

For example, the query in the image below shows items that include “final” in the title:

5. Check the boxes to the left of the items you want to protect from deletion and click **Next**.
6. Choose **Protect** to add deletion management to the items.
7. Click **Next**, review the changes, and click **Run Tool**.
The items have deletion management enabled.
8. Click **Back to Tools** to exit the **Delete Items** tool.

Move items into another account and optionally share them

Move items to another account to change who the owner is and who can edit them. Make sure to consider also changing the owner of supporting items (for example, a StoryMap likely relies on maps, layers, and possibly apps, all of which you'll need to change the owner of and share similarly).

How you move the items to another account depends on the items you need to move. This section includes recommendations for the following cases:

- [Moving a single item to another account](#)
- [Moving multiple items from one account to another account](#)

- [Moving multiple items from multiple accounts to another account](#) (if you are an admin; uses Geo Jobe Admin Tools)

 **Tip:** If you want to move all the items from one account to another as part of deleting the account, see [Delete accounts](#). Those steps allow you to delete multiple accounts at once, and as part of doing so, move their items into folders named for their original accounts.

Common use cases include:

- Creating a public collection of stellar examples of work in a **Showcase** account which ensures they are free of student PII and safely publicly shared by an adult.
 **Recommendation:** For a **Showcase** account, move all the items for a project, into a folder named for the original project. If all the items you are moving are owned by a single account, follow the steps in [Move multiple items from one account to another account](#). If they are owned by multiple accounts, follow the steps in [Move multiple items from multiple accounts to another account](#).
- Preserving student work in a **Storage** account even after the account of the original author is removed from ArcGIS Online.
 **Recommendation:** In a **Storage** account, move items into a folder named for the items' original owner. To do so, follow the steps in [Move multiple items from one account to another account](#).

 **Tip:** If you are deleting the account that owns the items, you can move all the items to the storage account when deleting the account. However, you must handle all items the same way when deleting the account: either deleting all items or moving all items to a different account.

Move a single item to another account

For each item, change its ownership and share it as follows:

 **Note:** You need to have the privilege to reassign content. Using the custom **Student** role defined in this document grants this privilege, as does the default **Administrator** role. Teachers with the default **Publisher** role do not have the privilege. If you want teachers to be able to reassign content, make a custom role for them based on the Publisher role and with that privilege enabled.

1. Go to its item page and click **Change owner** (by the **Owner** area midway down the right-hand column of info).
2. Search for and select the account you want to own the items.

 **Tip:** If you want to share the items publicly through your **Showcase** account, choose the **Showcase** account. If you want to store the items but remove them from the owner's account, choose the **Storage** account.

3. If desired, select or create a folder to move the content to.

 **Recommendations:**

- In a **Storage** account, move the item into a folder named for the item's original owner.
- In a **Showcase** account, move item into a folder named for the original project.

4. Click **Save**.

The item is now owned by the account you selected. The sharing is the same as it was before you changed the owner, and the sharing will be evaluated in the next step.

5. If the item's sharing needs to be updated, click **Share** at the top of the item page, set the sharing level and group sharing as desired, and click **Save**.

 **Tip:** For showcase or other items you want publicly accessible, set the sharing level to **Everyone (public)**. The item can now be accessed by anyone. You can put a link to it from a website or in an email, and the link will work even if they aren't signed in to ArcGIS Online or don't have an account in it.

Move multiple items from one account to another account

If moving multiple items owned by a single account to another account, use the tools in ArcGIS Online.

 **Tip:** Moving items with ArcGIS Online allows you to specify a folder to move them into within the new account, while the Geo Jobe Admin Tools don't support moving items to a folder within the new account.

1. Get to the items in one of the following ways:
 - a. If you are the owner, go to **Content** and choose the **My content** tab.
 - b. If you are an admin, go to **Organization > Members** and find the member who owns them. Click on the three dots to the right of the members' name and choose **Manage items**.
2. If the items are in multiple folders, go to the **All my content folder** (if you are the owner) or the **All of <username's> content** folder (if you are an admin) in the folder list to the left. If in a single folder, browse to that folder.
3. In the list of items, check the box beside each item you want to move.
4. [Update the items' sharing](#), if necessary.



Tip: For showcase or other items you want publicly accessible, set the sharing level to **Everyone (public)**. The item can now be accessed by anyone. You can put a link to it from a website or in an email, and the link will work even if they aren't signed in to ArcGIS Online or don't have an account in it.

5. If sharing was updated, in the list of items again check the box beside each item you want to move.
6. Click **More** above the table and choose **Change owner**.
7. Search for and select the account you want to own the items.

Tip: If you want to share the items publicly through your **Showcase** account, choose the **Showcase** account. If you want to store the items but remove them from the owner's account, choose the **Storage** account.

8. If desired, select or create a folder to move the items to.



Recommendations:

- In a **Storage** account, move the items into a folder named for the items' original owner.
- In a **Showcase** account, move items into a folder named for the original project.

9. Click **Save**.

The items are now owned by the account you selected.

Move multiple items from multiple accounts to another account (admins)

If moving multiple items from multiple accounts, use the Geo Jobe Admin Tools.



Tip: If you need to move the items into a specific folder within the new account, use the ArcGIS Online tools instead of the Geo Jobe Admin Tools. In ArcGIS Online, you'll need to move the items for a single account at a time.

1. [Open and sign in to the Admin Tools](#).
2. [Update the items' sharing](#), if necessary.

Tip: For showcase or other items you want publicly accessible, set the sharing level to **Everyone (public)**. The item can now be accessed by anyone. You can put a link to it from a website or in an email, and the link will work even if they aren't signed in to ArcGIS Online or don't have an account in it.

3. Click the **Items** tab and click **Move items**.
4. Review the filters applied to the item list. Remove any you don't want by clicking the red X beside the filter.
5. Click the blue + button above the table to filter for the items you want to manage, enter a query, and click the green checkmark to run it.

For example, the query in the image below shows items that include “final” in the title:



The image shows a search interface with the following fields and buttons:

- Search dropdown: Title
- Search dropdown: contains (partial)
- Search input field: final
- Green checkmark button
- Red X button

6. Check the boxes to the left of the items you want to move and click **Next**.
7. Search for and select the account you want to own the items and click **Next**.
- Tip:** If you want to share the items publicly through your **Showcase** account, choose the **Showcase** account. If you want to store the items but remove them from the owner’s account, choose the **Storage** account.
8. Choose the folder you want to own the moved items, adding a new folder if desired, and click **Next**.
9. Review the changes and click **Run Tool**.
10. Click **Back to Tools** to exit the **Move Items** tool.

Account management task steps

In managing accounts, there are a few tasks you take. Here are the details of how to do them.

Manually identify accounts to review

To find accounts of interest, filter and sort the **Members** list as follows:

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Members**.
2. Expand the Filter sections to the left of the table and click on a filter to find all members that meet certain criteria.
 - ⌚ **Recommendations:**
 - Find administrators by expanding **Role** and clicking **Administrator**.
 - Find accounts that haven't been used in the last year by expanding **Last login**, clicking **Custom range**, setting **Start date** to 1/1/1950, and setting **End date** to today's date last year.
3. Click a table header to sort by that column and click it again to change the sort order. By default, the list is sorted by most recent login.
 - ⌚ **Recommendation:** Find accounts that are rarely or never used by clicking the **Last login** table header to sort by least recent login.

Use reports to identify accounts to review

Generate a spreadsheet report of the members (accounts) in your organization, including their last sign in and the number of items they have, to evaluate what accounts to disable or delete. Do so as follows:

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Status**.
2. In the tabs at the top of the **Status** page, click **Reports**.
3. Click **Create report**, choose **Single report**, and create a report of type **Member**.
4. Once the report is created, download and open the spreadsheet.
When reviewing the accounts, focus on the accounts used least recently (or never), and accounts with no or few items.

Disable accounts

Accounts that aren't needed but whose items need to be reviewed can be disabled while the items are reviewed. Accounts can be disabled through the **Members** page of the organization as follows:

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Members**.
2. Check the box beside each member's account you want to disable.
3. Click **More** above the table and choose **Disable member accounts**.

Turn off Esri Access

For accounts to be fully deleted, Esri Access must be disabled. You can disable it on a single account in ArcGIS Online or in bulk with the Geo Jobe Admin Tools.

Update Esri Access of a single account

1. While logged in to ArcGIS Online, in the navigation at the top of your ArcGIS Online organization click **Organization**. In the blue tabs, choose **Members**.
2. Beside the account you'd like to turn off Esri Access for, click the three dots and choose **Disable Esri Access**. (If you already see **Enable Esri Access**, it's already off.)

Update Esri Access of multiple accounts

1. [Open and sign in to the Admin Tools](#).
2. Click the **Users** tab and click **Update Users Esri Access**.
3. Click the blue + button above the table to filter for the accounts you want to manage, enter a query, and click the green checkmark to run it.

For example, the query in the image below shows accounts that include “2024” in the username:



4. Check the boxes to the left of the accounts you want to manage, click **Next**, choose **Disable**, click **Next**, review the changes, and click **Run Tool**.
5. Click **Back to Tools** to exit the **Update Users Esri Access** tool.

Create accounts

The best way to create accounts for students and teachers is through [SSO](#). However, there may be times that you need accounts that can't be created through SSO – for example, if you are making a special account like the **Showcase** or **Storage** account used in management, or an account for a helper or mentor assisting with your organization. If SSO can't be used, [create accounts directly in ArcGIS Online](#) following the steps in Guide A – Quick Start.

Change the role (privileges) of an account

Responsibilities change, and you may need to change what an account is allowed to do. Updating the **role** assigned to an account changes what they are allowed to do in ArcGIS Online. Update the role of an account as follows:

1. If you are changing the role from administrator, the account must first be removed as an administrative contact as follows:
 - a. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Settings**.
 - b. Scroll to the **Administrative contacts** section. If the account you are changing is listed in that section, click the X to the right of their account to remove them as an administrative contact.
2. In the blue tabs, choose **Members**.
3. Find the account you want to change.
4. Set the **Role** drop-down to the right of the account to their new role.

Add an administrative contact

Consider for each administrator if they should be an administrative contact. As an administrative contact, they'll receive communications from Esri and member support requests. Add an administrative contact as follows:

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**.
2. In the blue tabs, choose **Settings**.
3. In **General**, go to the **Administrative contacts** section and click **Manage administrative contacts**.
4. Check the box beside the account to add as an administrative contact and click **Save**.

Remove an administrative contact

Accounts that will no longer be administrators need to be removed from the administrative contacts. Remove them as follows:

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**.
2. In the blue tabs, choose **Settings**.
3. In **General**, go to the **Administrative contacts** section.
4. Click the x beside the account to remove it as an administrative contact.

Delete accounts

Accounts that aren't needed should be deleted. There are a couple of ways to delete accounts:

- Many accounts can be deleted following [the basic steps for deleting accounts](#) (which supports moving the items from each account into a folder named for the original account).
 **Recommendation:** If you are *moving the items from the accounts you are deleting into another account*, like the **Storage** account, use the basic steps and put all the items into folders named for the original accounts. This deletes any groups owned by the accounts but does move the items into the folders, even if they have deletion management enabled.
- However, if an account owns any items that have deletion management enabled and you want those items deleted, or if it owns any groups you want transferred, follow the steps for [deleting accounts owning items with deletion management enabled or owning groups](#) (which uses Geo Jobe Admin Tools, and supports moving the items from each account into a different account, but not into folders).
 **Recommendation:** If you are *deleting the items from the accounts* and have accounts that might have items with deletion management enabled or that might own groups, use the Geo Jobe Admin Tools.

 **Note:** When an account is deleted, it is deleted completely. You'll be able to choose if the items and groups of that account are deleted or reassigned to another account.

 **Note:** If using SSO, when you delete an account from your identity provider, it doesn't delete the ArcGIS Online account. You also need to delete the ArcGIS account to avoid orphaned accounts.

Delete accounts (basic)

Accounts can be deleted through the **Members** page of the organization as follows:

 **Tip:** Members that own items with deletion management enabled can't be deleted in ArcGIS Online but can be with Geo Jobe Admin Tools. Members that own groups can't be deleted in bulk in ArcGIS Online but can be with Geo Jobe Admin Tools. See [Delete accounts owning items with deletion management enabled or owning groups](#).

1. In the navigation at the top of your ArcGIS Online organization, click **Organization**. In the blue tabs, choose **Members**.
2. Check the box beside each member's account you want to delete.
3. Click **More** above the table and choose **Delete members**.
4. If deleting a single account, choose if you want its content (items) and groups transferred to another account or deleted.
5. If deleting multiple accounts, choose for each account if you want its content (items) transferred to another account or deleted.
6. In the final **Delete members** panel, specify the account and folders to transfer items into, if transferring them.

 **Recommendation:** If transferring items, transfer them into folders named for the previous account by choosing **Create a folder for each previous owner**.

7. In the final **Delete members** panel, verify that **Keep Esri Access** is disabled (not checked) if the option is visible.
8. Click **Delete members**.

For each member, Esri Access is disabled, licenses are revoked, items are transferred or deleted, and the member is deleted. If deleting a single account, any groups it owns are also transferred or deleted.

 **Note:** If an account owns items with deletion management enabled and you try to delete the items as part of deleting the account, deleting the account will fail. If an account owns groups and you are deleting multiple accounts, deleting will fail.

Delete accounts owning items with deletion management enabled or owning groups

Use the Admin Tools by Geo Jobe to delete accounts with items with deletion management enabled or accounts owning groups as follows:

1. [Open and sign in to the Admin Tools](#).
2. [Turn off Esri Access](#) if you haven't already done so.
3. In the Geo Jobe Admin Tools, click the **Users** tab and click **Delete Users**.
4. Click the blue + button above the table to filter for the accounts you want to manage, enter a query, and click the green checkmark to run it.

For example, the following query shows accounts that haven't been used since 2022:

Last Logged In	before	01/01/2023	<input type="button" value=""/>	<input checked="" type="button" value=""/>	<input type="button" value="X"/>
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5. Check the boxes to the left of the accounts you want to delete and click **Next**.
6. If prompted, provide the action to take with items and groups they own. You can set this for all accounts using the blue **Configure All At Once** button above the list, or separately for each account using the **Configure** button in the table to the right of

each account. Choose if you want the items and groups deleted, or, if assigned to another account, what account to assign them to. Click **OK**.

7. Click **Run Tool**.

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