GeoPlatform Account Request Tool User Guide

November 2019

The GeoPlatform Account Request Tool is a web-based tool used to rapidly provision EPA GeoPlatform user accounts during emergency response events. Field crews rotate on and off responses and may require accounts on short notice to access and update data using tools such as ArcGIS Collector and Survey123. To begin a new emergency response, contact **** to configure the tool for a new response.

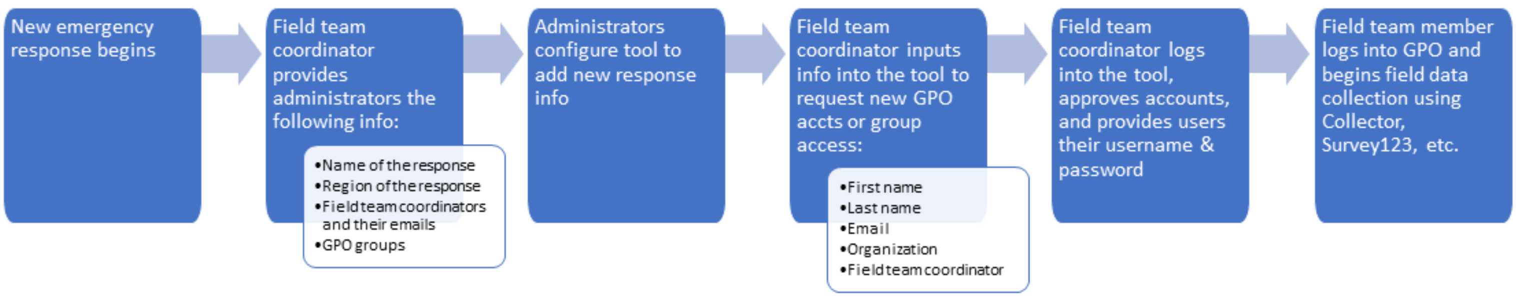

Figure 1. Overview of the Account Request Tool process

Field Team Coordinators

Starting a New Response Team

Field Team Coordinators are responsible for contacting the Administrators to establish a new Response Team at the beginning of a response. A **Response Team** is comprised of a list of GeoPlatform groups used during a given response (*example, right*) and a list of corresponding Field Team Coordinators who have permission to provide users access to those groups in the Account Request Tool.

Contact the Administrators to:

(a) Set up new GeoPlatform groups or identify existing groups to use for the response

(b) Establish a Response Team for use in the Request Tool

(c) Become a Field Team Coordinator on an existing Response Team

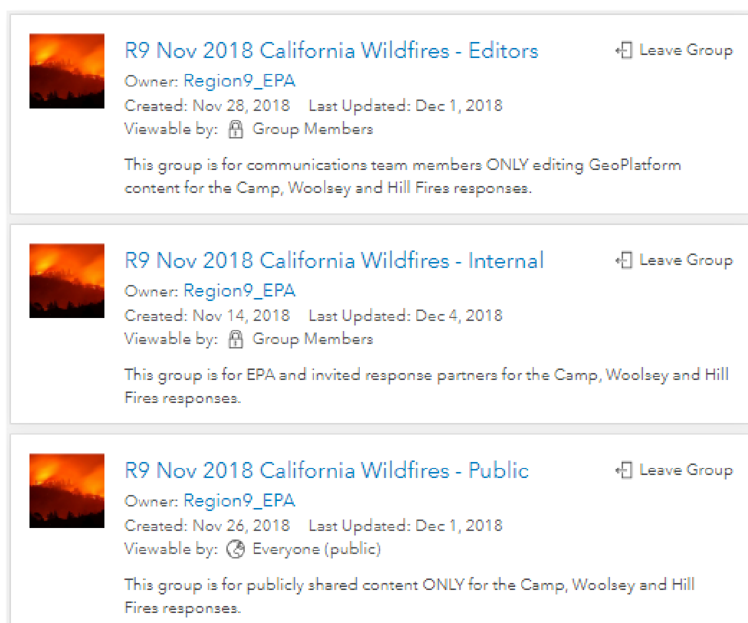

Figure 2. A variety of groups may be used during a response, including Editors, Internal, and Public version. Field Team Coordinators can provide users access to one or more groups.

Requesting GeoPlatform Access

Navigate to request.ercloud.org in a web browser on your desktop or mobile device and fill out the Request Form. The First Name, Last Name, and Email provided will be used to create the new account.

When selecting the Field Team Coordinator from the drop-down list, note that this is the person (potentially you) who will receive a notification to approve your request.

Once you have completed the Request Form, click **Submit**. Continue to submit individual requests for all field team members in need of accounts or group access.

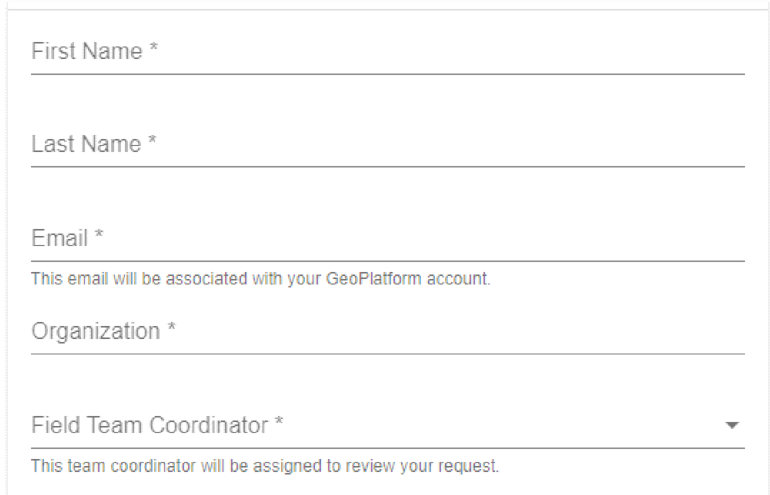

Figure 3. Fill out the Request Form to request a new account

Granting GeoPlatform Access

Once you become a Field Team Coordinator, you will have to approve requests for access to the GeoPlatform and groups. To do so, navigate to request.ercloud.org in the desktop browser of your choice and select the **Field Team Coordinator Login** in the top-right corner. Log in with your GeoPlatform credentials.

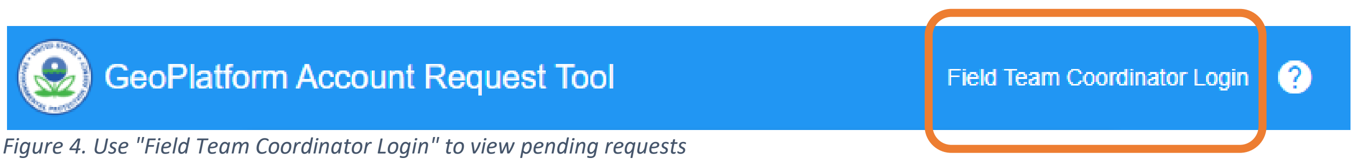

Figure 4. Use "Field Team Coordinator Login" to view pending requests

Once you log in, you will see all pending account requests. Use the **Groups** drop-down to select one or more Groups for each request.

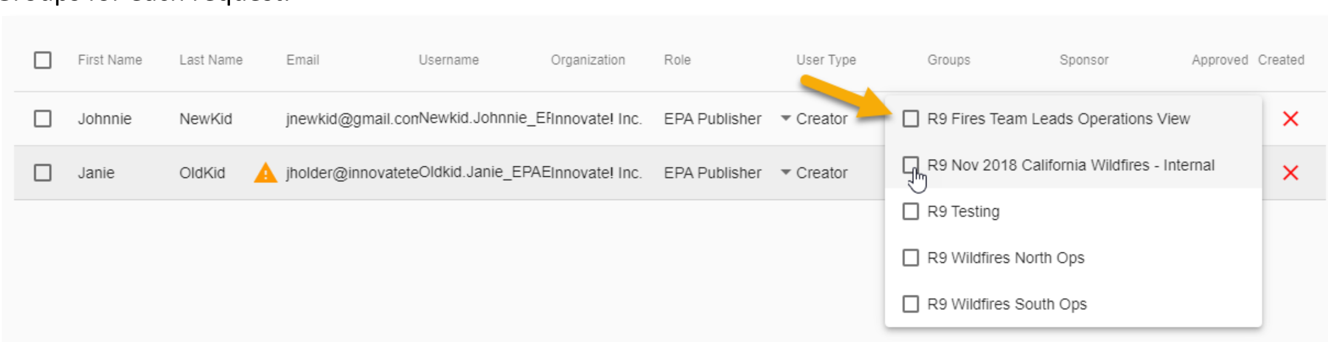

Figure 5. Add users to a group by selecting the check-box next to the group name

Once you review the request and select the appropriate groups, check the box on the far left-hand side and click **Approve** to create the account. When you are prompted to provide a password for the new account, ensure you remember and/or record it to provide to the new user. Users will immediately have access using their new username and the password you provided.

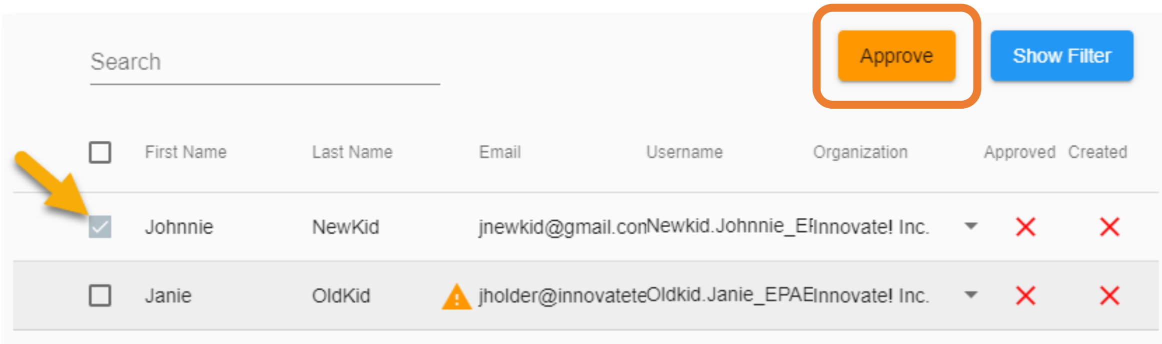

Figure 6. Click Approve to create the new account

Occasionally, users will request access to groups through the Request Tool but already have a GeoPlatform account. The orange warning triangle will appear next to their email, indicating an account is already associated with the email the Requestor provided.

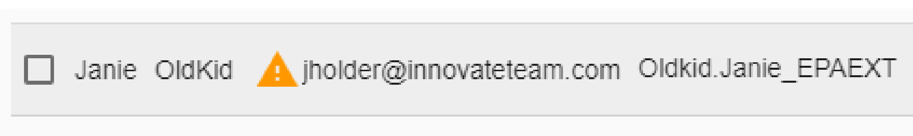

Figure 7. An orange triangle indicates an account is already associated with the email

Requestors may already have a GeoPlatform account but request a new one for a variety of reasons. The account may be associated with a different office or region. The user may have changed organizations or emails. The user may have forgotten their password and lost access. It is at the Field Team Coordinator's discretion to decide if the user should have a new account created or reset access to an old account.

As a Field Team Coordinator, you can:
(1) approve the request as-is, creating a new GeoPlatform account, or
(2) edit the text in the Username column to an existing username.

By default, the Field Team Coordinator view shows only pending requests (Approved & Created is False). To view all requests, or view those already created and approved, click Show Filter on the right-hand side. Select True in the **Approved & Created** drop-down to see processed records, or click **Clear All** to see all requests.

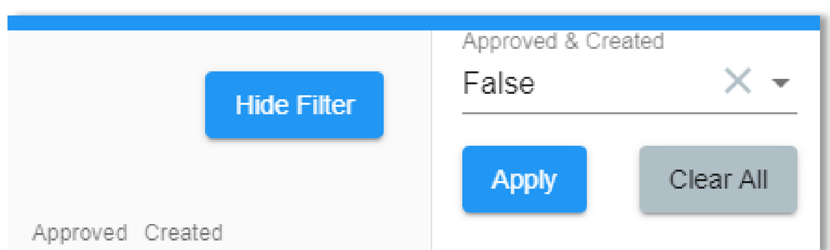

Figure 8. By default, the Approved & Created Filter is set to False, showing only pending requests

Administrators

The Region 9 Technology and Data Solutions Center administers the Request Tool administrators. Contact Cheryl Henley (415-972-3586) for support with the tool or any additional questions.