GeoPlatform Account Request Tool User Guide
December 2019

The [GeoPlatform Account Request Tool](#) is a web-based tool used to rapidly provision of EPA GeoPlatform user accounts during projects and 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 project or emergency response, use the following workflow.
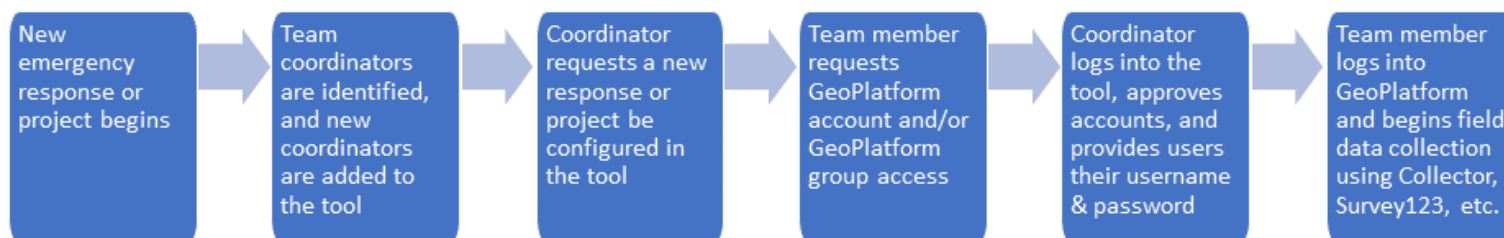

| New emergency response or project begins | → | Team coordinators are identified, and new coordinators are added to the tool | → | Coordinator requests a new response or project be configured in the tool | → | Team member requests GeoPlatform account and/or GeoPlatform group access | → | Coordinator logs into the tool, approves accounts, and provides users their username & password | → | Team member logs into GeoPlatform and begins field data collection using Collector, Survey123, etc. |

Figure 1. Overview of the Account Request Tool process

Get Started

Team Coordinators are responsible for requesting access to the tool and establishing new Responses or Projects. A **Response or Project** comprised of a list of GeoPlatform groups used during a given event and a list of corresponding Team Coordinators who have permission to provide users access to those groups in the Account Request Tool.

Team Coordinators   Configure New Response or Project   Request GeoPlatform User Account
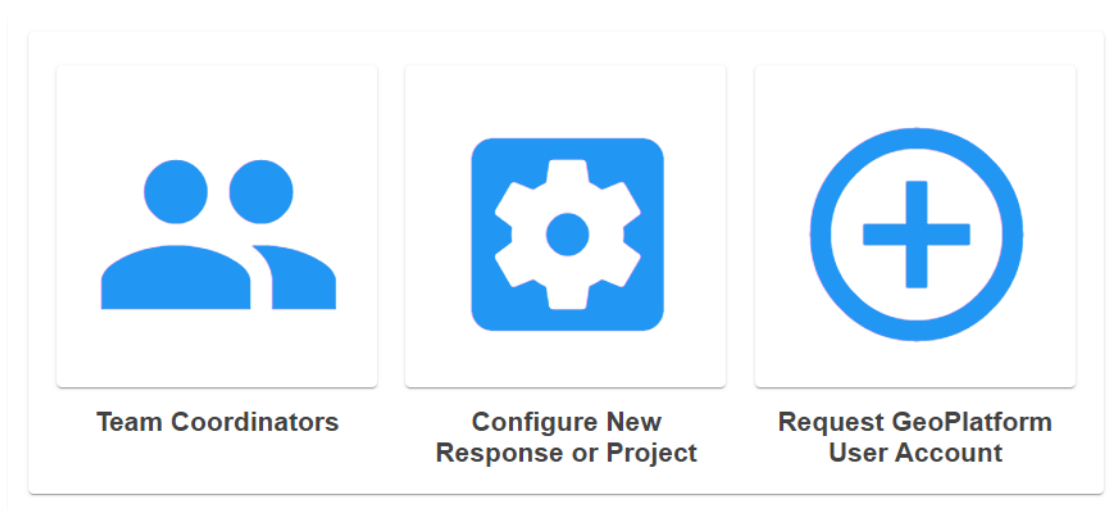
Use the tool to:
1. Request to be a Team Coordinator
2. Establish a new Response or Project Team for use in the Request Tool
3. Input or approve requests for GeoPlatform accounts

Request to be a Team Coordinator

Click on the **Team Coordinators** button from the home page to see a list of Coordinators who already have access to the tool.

From the Team Coordinators page, use the **Request to be a Team Coordinator** button to add yourself or another coordinator:

Request to be a Team Coordinator

Then, fill out the **Team Coordinator Request Form** completely. The request will be emailed to tool administrations for review.

Once the request is reviewed, the new coordinator will be notified when their access is approved.

Team Coordinator Request Form

Use the form below to request access to approve user account requests and assign users to GeoPlatform groups for a specific emergency response or project.

First Name *

Last Name *

Phone Number *

Email *

Primary Auth Group *

GeoPlatform User Account *

Which response or project are you working on? *

Cancel   Submit

Figure 2. Fill out the Team Coordinator Request Form

Configure New Response or Project

Click on the **Configure New Response or Project** button from the home page to request to add a new event to the tool.

Then, fill out the **Response/Project Request Form** completely. The list of Team Coordinators selected will have access to add users to the GeoPlatform groups selected.

Once the request is reviewed, the coordinator will be notified when their access is approved.

Response / Project Request Form

Use the form below to request a new emergency response or project be added to the tool.

Response or Project Name *

Team Coordinators *

If needed, return to the Team Coordinators page to request additional Coordinators.

GeoPlatform Groups *

Select all applicable groups.

Coordinator / Requester Name *

Coordinator / Requester Phone *

Submit

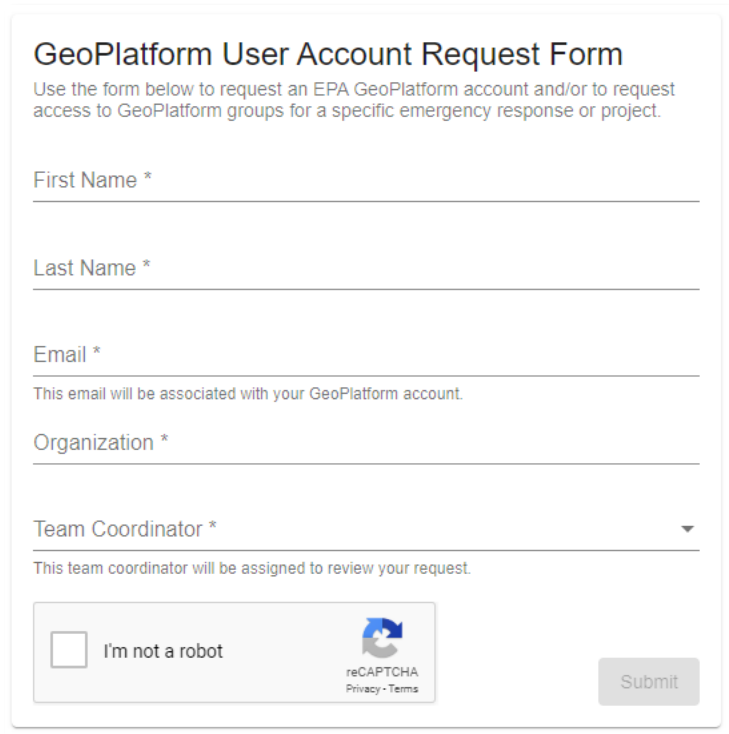*Figure 3. Fill out the Response/Project Request Form*

Request GeoPlatform User Account

Click on the **Request GeoPlatform User Account** button from the home page to request new GeoPlatform users or to add existing users to GeoPlatform groups.

Then, fill out the **GeoPlatform User Account Request Form**. The First Name, Last Name, and Email provided will be used to create the new account.

When selecting the 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.

GeoPlatform User Account Request Form

Use the form below to request an EPA GeoPlatform account and/or to request access to GeoPlatform groups for a specific emergency response or project.

First Name *

Last Name *

Email *
This email will be associated with your GeoPlatform account.

Organization *

Team Coordinator *
This team coordinator will be assigned to review your request.

[ ] I'm not a robot
reCAPTCHA
Privacy · Terms

Submit

Figure 4. Fill out the GeoPlatform User Account Request Form

Grant GeoPlatform Access

As a Team Coordinator, you will have to approve requests for access to the GeoPlatform and groups. To do so, select the **Team Coordinator Login** in the top-right corner. Log in with your GeoPlatform credentials.
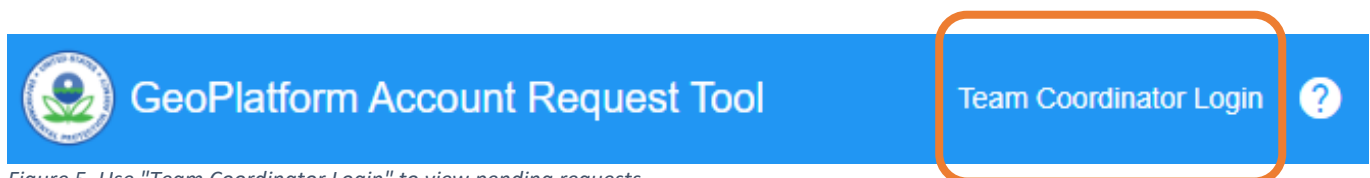
GeoPlatform Account Request Tool | Team Coordinator Login ?

Figure 5. Use "Team Coordinator Login" to view pending requests

Once you log in, you will see all pending account requests. Accounts can be reviewed and approved one or multiple at a time. Check the box on the far left-hand side and click **Edit** to review the account(s).

Search | | | | | | | | | Edit | Show Filter

	First Name	Last Name	Email	Username	Organization	Groups	Coordinator	Reason	Description	Approved	Created
[ ]	Johnnie	Newkid	jnewkid@gmail.com	Newkid.Johnnie_EPAEXT	Innovate! Inc.	✓	✓	✓	✓	✗	✗
[✓]	Janie	Oldkid	joldkid@gmail.com	Oldkid.Janie_EPAEXT	Innovate! Inc.	⚠	✓	✓	⚠	✗	✗

Figure 6. View pending requests in the Approval List

If *one account* is selected, you can edit:

1. GeoPlatform username
2. GeoPlatform groups
3. Assigned coordinator
4. Reason the account was created
5. Description of the user

If *multiple accounts* are selected, you can bulk edit:

1. GeoPlatform groups
2. Assigned coordinator
3. Reason the account(s) was created
4. Description of the user(s)

Figure 7. Editing a single record allows you to edit the GeoPlatform username

Figure 8. When bulk editing, the same value(s) will be assigned to all of the accounts selected

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.

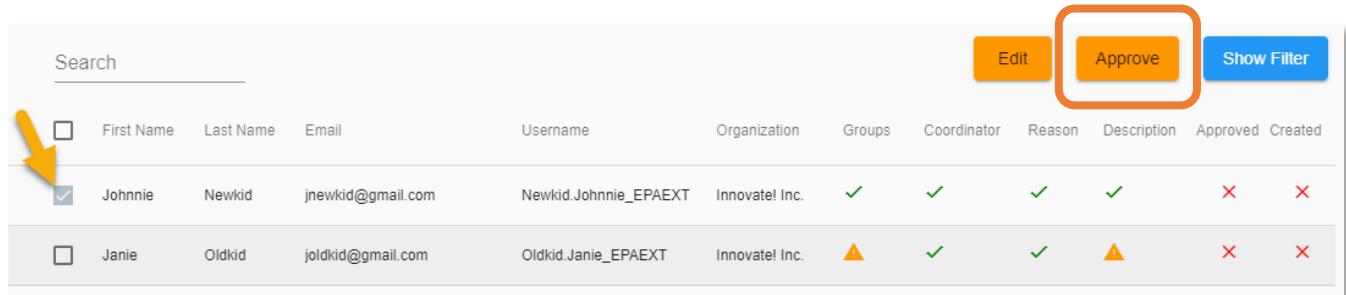*Figure 9. An orange triangle indicates an account is already associated with the email*

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

> 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 up to the Field Team Coordinator's discretion to decide if the user should have a new account created or reset access to an old account.

Once you review the requests and select the appropriate groups and reason and provide a description, click **Submit** to update the request(s).
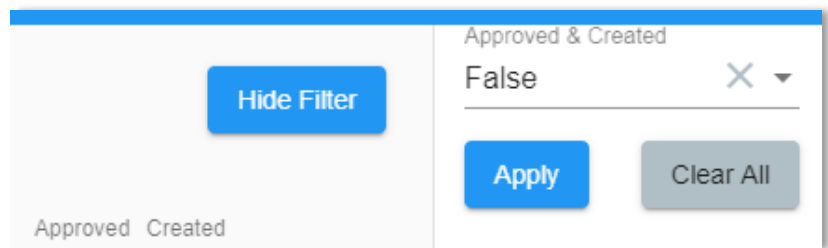
From the pending requests list, check the box on the far left-hand side again. Once all of the required elements have been provided, the **Approve** button will appear to create the account. When you are prompted to provide a password for the new account, ensure you remember and/or record it to provide to the new user. Users will immediately have access using their new username and the password you provided.

Figure 10. Click Approve to create the new account(s)

By default, the 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 11. By default, the Approved & Created Filter is set to False, showing only pending requests

Pester the Administrators

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