



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.

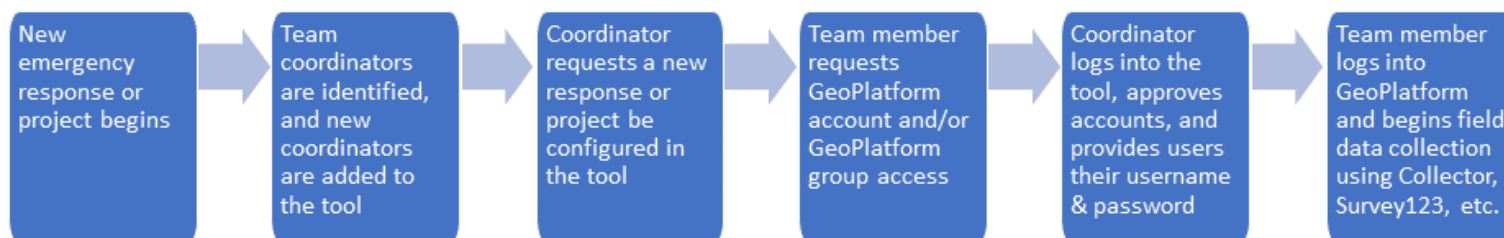
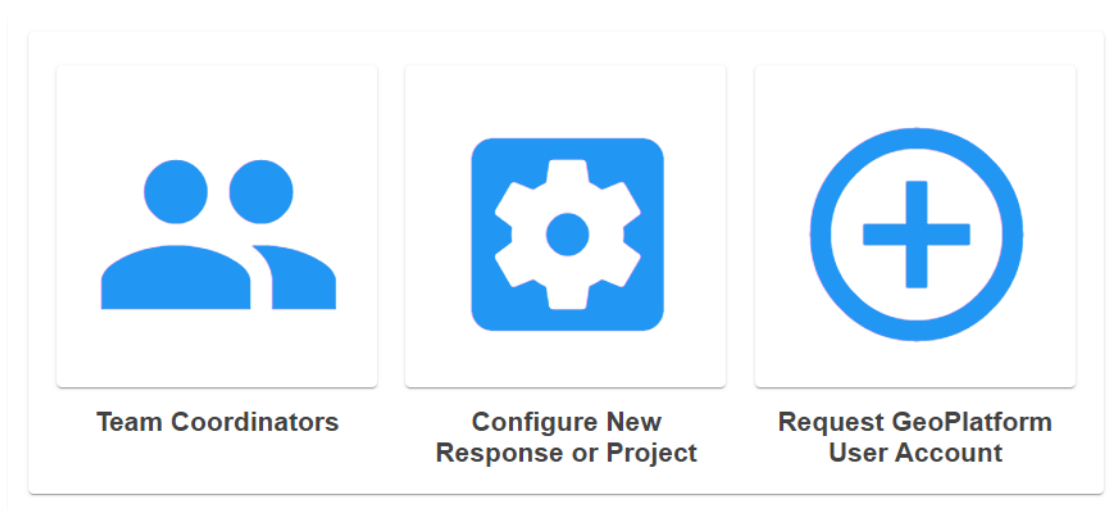


Figure 1. Overview of the Account Request Tool process

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 (*example, right*) and a list of corresponding Team Coordinators who have permission to provide users access to those groups in the Account Request Tool.



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

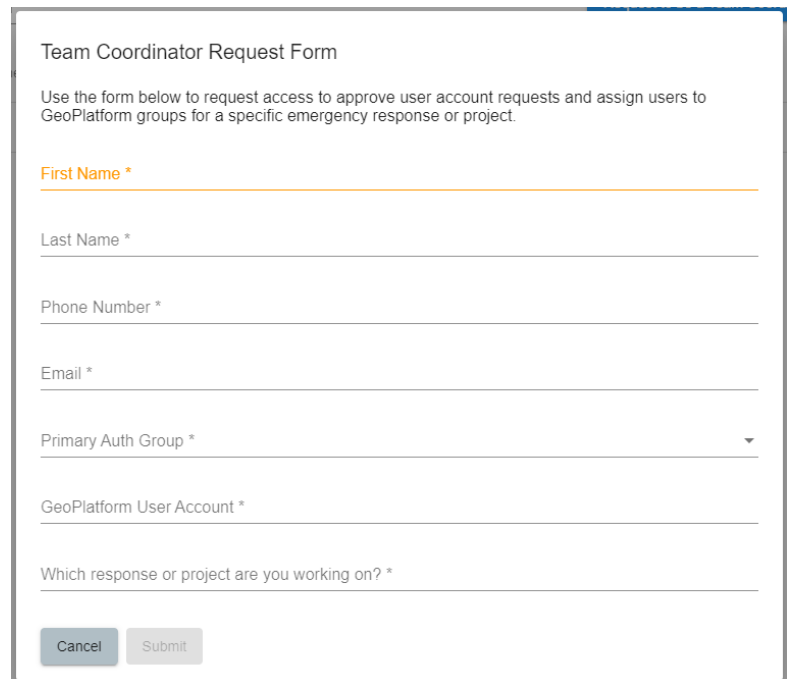
Click on the Team Coordinators button from the home page to see a list of Coordinators who already have access to the tool.

Use the Request to be a Team Coordinator 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 new coordinator will be notified when their access is approved.



The screenshot shows a web form titled "Team Coordinator Request Form". Below the title is a brief instruction: "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." The form contains several input fields: "First Name *" (highlighted in orange), "Last Name *", "Phone Number *", "Email *", "Primary Auth Group *" (a dropdown menu), "GeoPlatform User Account *", and "Which response or project are you working on? *". At the bottom of the form are two buttons: "Cancel" and "Submit".

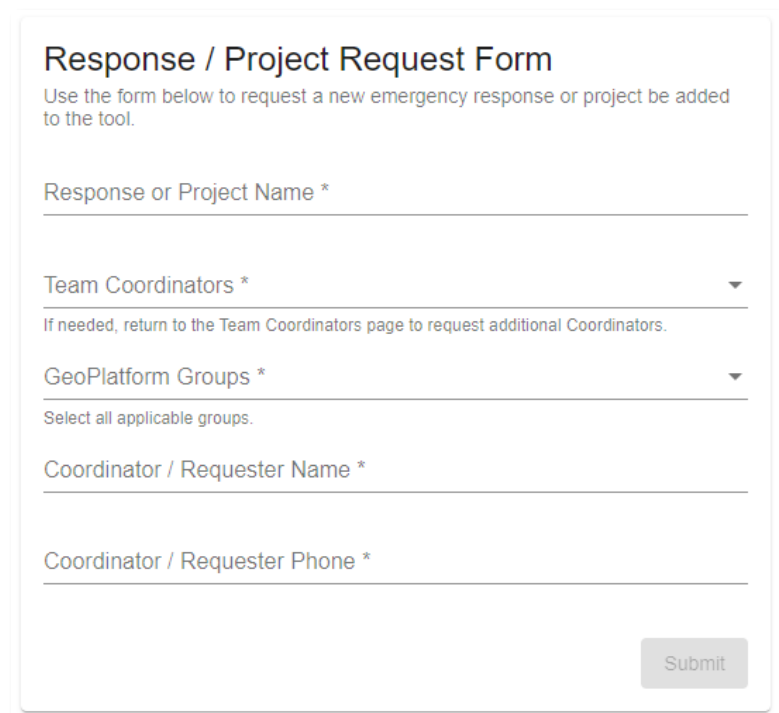
Figure 2. Fill out the Team Coordinator Request Form

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 coordinator will be notified when their access is approved.



The screenshot shows a web form titled "Response / Project Request Form". Below the title is a brief instruction: "Use the form below to request a new emergency response or project be added to the tool." The form contains several input fields: "Response or Project Name *", "Team Coordinators *" (a dropdown menu), "GeoPlatform Groups *" (a dropdown menu), "Coordinator / Requester Name *", and "Coordinator / Requester Phone *". Below the "Team Coordinators" dropdown is a note: "If needed, return to the Team Coordinators page to request additional Coordinators." Below the "GeoPlatform Groups" dropdown is a note: "Select all applicable groups." At the bottom right of the form is a "Submit" button.

Figure 3. Fill out the Response/Project Request Form

Request GeoPlatform User Account

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 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, navigate to request.ercloud.org in the desktop browser of your choice and select the **Team Coordinator Login** in the top-right corner. Log in with your GeoPlatform credentials.

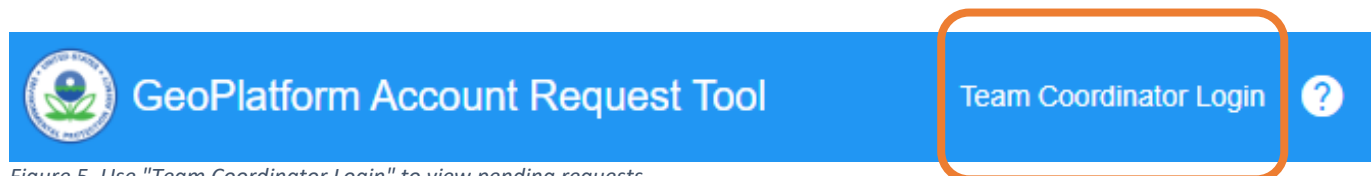


Figure 5. Use "Team Coordinator Login" to view pending requests

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.

<input type="checkbox"/>	First Name	Last Name	Email	Username	Organization	Role	User Type	Groups	Sponsor	Approved	Created
<input type="checkbox"/>	Johnnie	NewKid	jnewkid@gmail.com	Newkid.Johnnie_Ef	Innovate! Inc.	EPA Publisher	Creator	<input type="checkbox"/> R9 Fires Team Leads Operations View <input type="checkbox"/> R9 Nov 2018 California Wildfires - Internal <input type="checkbox"/> R9 Testing <input type="checkbox"/> R9 Wildfires North Ops <input type="checkbox"/> R9 Wildfires South Ops			
<input type="checkbox"/>	Janie	OldKid	jholder@innovateteam.com	Oldkid.Janie_EPA	Innovate! Inc.	EPA Publisher	Creator				

Figure 6. 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.

<input type="checkbox"/>	First Name	Last Name	Email	Username	Organization	Approved	Created
<input checked="" type="checkbox"/>	Johnnie	NewKid	jnewkid@gmail.com	Newkid.Johnnie_Ef	Innovate! Inc.	X	X
<input type="checkbox"/>	Janie	OldKid	jholder@innovateteam.com	Oldkid.Janie_EPA	Innovate! Inc.	X	X

Figure 7. 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.

<input type="checkbox"/>	Janie	OldKid	⚠️ jholder@innovateteam.com	Oldkid.Janie_EPAEXT
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Figure 8. 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 text in the Username column 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.

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.

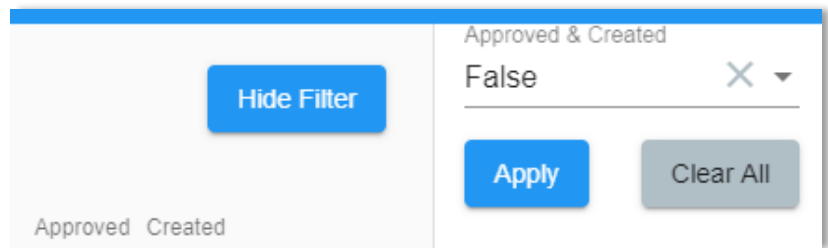


Figure 9. By default, the Approved & Created Filter is set to False, showing only pending requests

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.