



# GeoPlatform Account Request Tool User Guide FOR ADMINISTRATORS

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. Administrators are responsible for configuring the tool for new responses and new Team Coordinators.

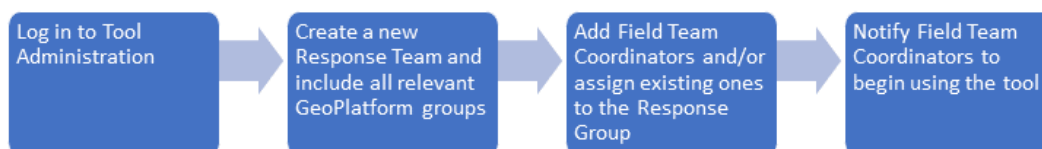


Figure 1. Administrative workflow to set up a new response

## Starting a New Team

A response or project **Team** is comprised of a list of GeoPlatform groups and a list of corresponding Team Coordinators.

Team Coordinators assigned to a Team can approve account requests and assign accounts to the specific GeoPlatform groups associated with their Team(s).

To configure a new Team, log in to the **Tool Administration** using the **Login Using EPA GeoPlatform Option**:

<https://request.ercloud.org/api/admin/>

Figure 2. Log in using your EPA GeoPlatform account

From the Tool Administration page, select **Groups** in the Authentication and Authorization section (right).

Then, use the **ADD GROUP +** button in the upper-right hand side of the page to configure a new Team.

Figure 3. Navigate to the Groups page to get started

## Add a Team (Group)

1. In the Add group form, provide a meaningful **Name** for the Team.
2. In the **Permissions** section, select the 3 permissions identified to the right:
  - (a) *Can add Account Request*
  - (b) *Can change Account Request*
  - (c) *Can view Account Request*
3. Select all applicable GeoPlatform groups from the **Assignable groups** section. Every Team Coordinator assigned to the response will be able to add users to these groups. Hold down the 'Control' key (Windows) or 'Command' key (Mac) to select more than one group.
4. Click **Save** to create the Team.

**EPA GeoPlatform Account Request Tool** WELCOME, JENNY. [VIEW SITE](#) / [CHANGE PASSWORD](#) / [LOG OUT](#)

Home > Authentication and Authorization > Groups > Add group

### Add group

**Name:**

**Permissions:**

**Available permissions** ⓘ

Filter

- accounts | Account Request | Can delete Account Request
- accounts | agol | Can add agol
- accounts | agol | Can change agol
- accounts | agol | Can delete agol
- accounts | agol | Can view agol
- accounts | agol group | Can add agol group
- accounts | agol group | Can change agol group
- accounts | agol group | Can delete agol group
- accounts | agol group | Can view agol group
- accounts | agol group fields | Can add agol group fields
- accounts | agol group fields | Can change agol group fields
- accounts | agol group fields | Can delete agol group fields
- accounts | agol group fields | Can view agol group fields

Choose all ⓘ

**Chosen permissions** ⓘ

- accounts | Account Request | Can add Account Request
- accounts | Account Request | Can change Account Request
- accounts | Account Request | Can view Account Request

Remove all ⓘ

Hold down "Control", or "Command" on a Mac, to select more than one.

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**AGOL GROUP FIELDSS**

**Agol group fields: #1**

**Assignable groups:**

- R9 Fires 2018 North Ops
- R9 Fires 2018 South Ops
- R9 Fires Sharing - 2019 - State Contractors
- R9 Fires START Admin Group
- R9 Fires Team Leads Operations View
- R9 Fires Zone App Sharing - Development
- R9 Floorplan and Facilities Mgmt
- R9 Fresno Drum Admin- START

Hold down "Control", or "Command" on a Mac, to select more than one.

Save and add another Save and continue editing **SAVE**

Figure 4. Provide a Name, Permissions and Assignable groups sections to configure a Team

## Adding Team Coordinators (Users)

Once the Team is set up, navigate back to the main Tool Administration page and select **Users** in the Authentication and Authorization section (right).



Then, use the **ADD USER +** button in the upper-right hand side of the page to add a new Team Coordinator.

1. In the **Add user** form, provide a Username and Password.
2. In the **Agol username** section, enter the exact GeoPlatform account username for the Team Coordinator.
3. Select the appropriate **Authoritative group** from the drop-down.
4. Click **Save** to continue setting up the account.

**Add user**

First, enter a username and password. Then, you'll be able to edit more user options.

**Username:**   
Required. 150 characters or fewer. Letters, digits and @/./+/\_ only.

**Password:**   
Your password can't be too similar to your other personal information.  
 Your password must contain at least 8 characters.  
 Your password can't be a commonly used password.  
 Your password can't be entirely numeric.

**Password confirmation:**   
Enter the same password as before, for verification.

**AGOL USER FIELDSS**

**Agol user fields: #1**

**Agol username:**

☐ Sponsor

**Authoritative group:**

**Phone number:**

**Delegates:**  +

**Save and add another** **Save and continue editing** **SAVE**

Figure 5. Provide a Username, Password, Agol username, and Authoritative group to continue setting up a Team Coordinator account

5. In the **Personal info** section, provide the Team Coordinator's First name, Last name, and Email address.
6. In the **Permissions** section, select the Team from the Available Groups list and use the right arrow ➡ to assign the user to that Team. Note that Team Coordinators can participate in multiple responses simultaneously.

Figure 6. Use the right arrow to assign a Team Coordinator to a Response Group

7. If the Team Coordinator is a Sponsor, check the **Sponsor** checkbox in the AGOL User Fields section at the bottom of the page: ☒ **Sponsor**
  - a. A Sponsor is an EPA personnel member who can sponsor users in the GeoPlatform Dashboard (<https://igeo.epa.gov/gpdashboard/>).
  - b. A contractor to EPA *cannot* be a Sponsor but can be a **Delegate**. A Delegate can approve requests on the Sponsor's behalf. If the new Team Coordinator is a Delegate, continue through step 10.
8. Click **Save** to finish adding the Team Coordinator.
9. Repeat steps 1-7 until all Team Coordinators have been added.
10. If the Team Coordinator is a Delegate, navigate to the Sponsor's user account by clicking the existing user in the Users list:

- a. Click into the Delegates box in the AGOL User Fields section at the bottom of the page:

The screenshot shows the 'AGOL USER FIELDSS' section. Under 'Agol user fields: AGOLUserFields object (7)', there are fields for 'Agol username:', 'Sponsor' (checked), 'Authoritative group:', 'Phone number:', and 'Delegates:'. A dropdown menu is open for the 'Delegates:' field, showing a list of names: Jenny Holder, newFirstName newLastName (highlighted), Robert Homsher, Travis Bock, Torrin Hultgren, and Tom McKennon. Below the dropdown, the 'Delegates:' field contains buttons for 'x Jenny Holder', 'x Robert Homsher', 'x Travis Bock', and 'x Tom McKennon', with a green plus sign to the right.

- b. Select the Delegate from the list to assign them to the Sponsor. This Team Coordinator will not appear in the Team Coordinators directory page of the main GeoPlatform Account Request Tool, but the user can log in to the Approval List and inherits all of the permissions of the Sponsor.

The screenshot shows the 'Delegates:' field with buttons for 'x Jenny Holder', 'x Robert Homsher', 'x Travis Bock', 'x Tom McKennon', and 'x newFirstName newLastName'. A green plus sign is to the right of the buttons.

## Notify Team Coordinators

Once the tool and users have been configured for a new response, notify the Team Coordinator(s) that the tool is ready.

## Additional Support

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.