EPA GeoPlatform/GeoSecure Account Request Tool User Guide
June 2024

The Account Request Tool is a web-based tool that rapidly provisions EPA GeoPlatform and GeoSecure user accounts. **Team Coordinators** (also referred to as Sponsors) are responsible for requesting new Responses or Projects. A **Response** or **Project** is 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 can optionally designate **Delegates**, who will inherit their permissions to review and approve accounts. Team Coordinators must be EPA staff; Delegates can be contractors.

Use the tool to:

1. Establish a new Response or Project Team for use in the Request Tool
    a. Set up optional Delegates with permissions to review and approve account requests
2. Request or approve requests for GeoPlatform and GeoSecure accounts

Establish a New Response/Project

To begin, first decide whether your account requests are intended for the GeoPlatform or GeoSecure. Log in to the respective system using the Team Coordinator Login link in the top right corner of the page.

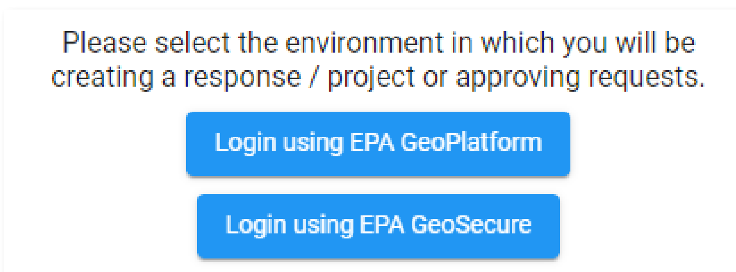


Figure 1 - Log in to the relevant system

After you are logged in, click the **Configure New Response/Project** button on the home page.

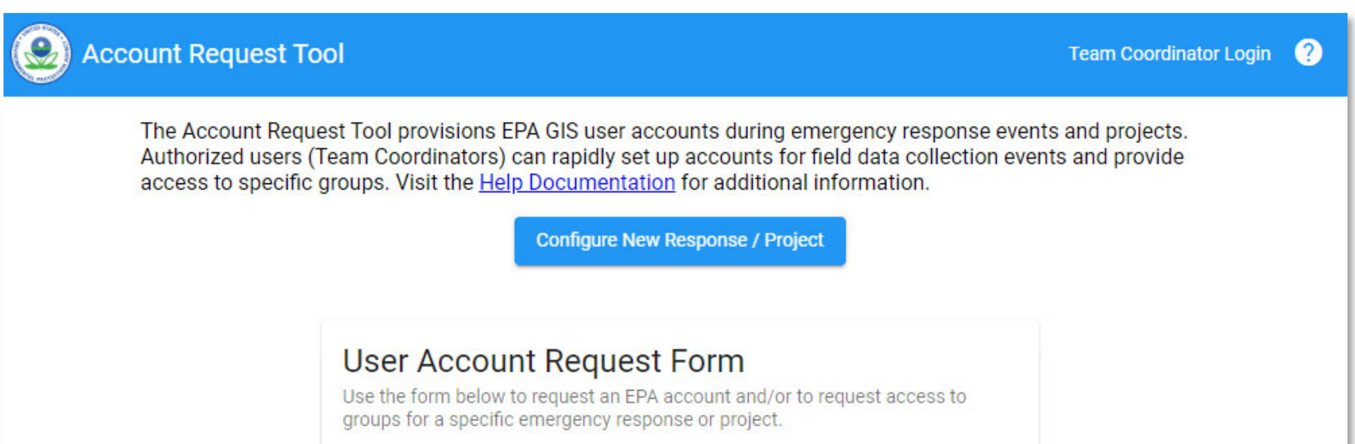


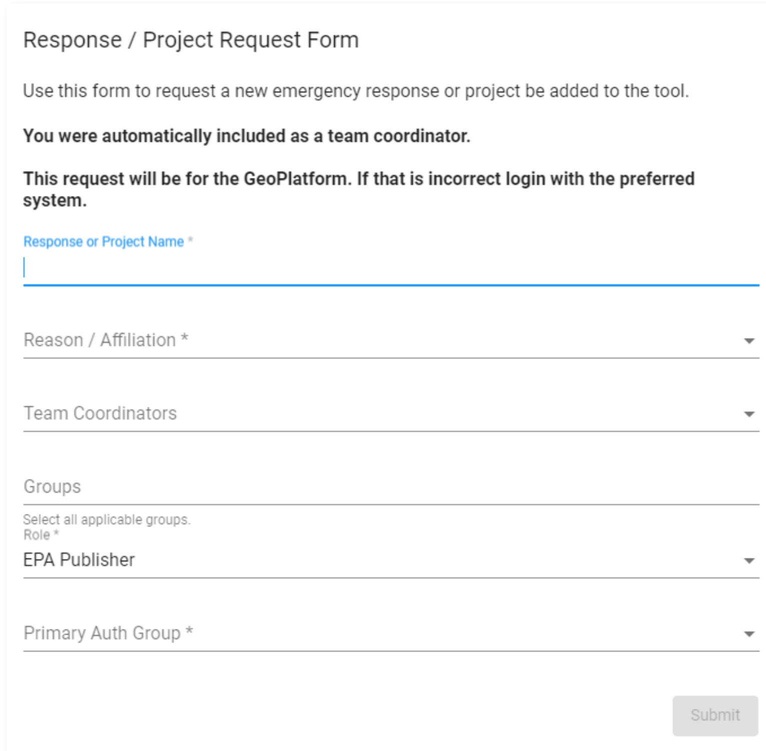
Figure 2 - Use the Configure New Response/Project button on the home page to request a new Response/Project

Fill out the **Response/Project Request Form** completely.

Submitting this form will automatically notify the tool administrators to review your request.

Once the administrators approve your request, you will receive an automated email notification that the Response/Project has been configured.

In additional Delegates are required, reach out to the administrators.


Response / Project Request Form

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

You were automatically included as a team coordinator.

This request will be for the GeoPlatform. If that is incorrect login with the preferred system.

Response or Project Name *

Reason / Affiliation *

Team Coordinators

Groups

Select all applicable groups.

Role *

EPA Publisher

Primary Auth Group *

Submit

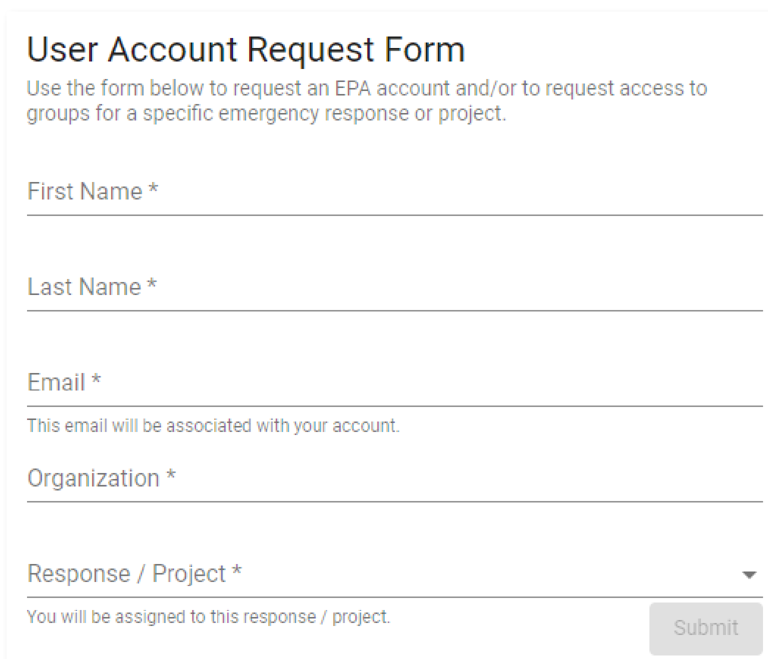
Figure 3 - Use the form to request a new Response/Project

Request User Accounts

Fill out the **User Account Request Form** on the home page of the tool. The First Name, Last Name, and Email provided will be used to create the new account.

When selecting the Response/Project, note that Team Coordinators and Delegates associated with this selection will receive a notification email to approve the request.

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


User Account Request Form

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

First Name *

Last Name *

Email *

This email will be associated with your account.

Organization *

Response / Project *

You will be assigned to this response / project.

Submit

Figure 4 - Fill out the User Account Request Form

Grant Access

As a Team Coordinator, you will have to approve requests for access to the GeoPlatform/GeoSecure and groups. To do so, ensure you are still logged in. Your name will appear in the top right corner of the page if you are logged in.

When you are logged in, click your name in the top right and click **Approval List** in the dropdown menu. You will see all pending account requests on the Approval List page. Accounts can be reviewed and approved one at a time or as a batch by selecting multiple requests. Check the box(es) on the far left side and click **Edit** to review the account(s).

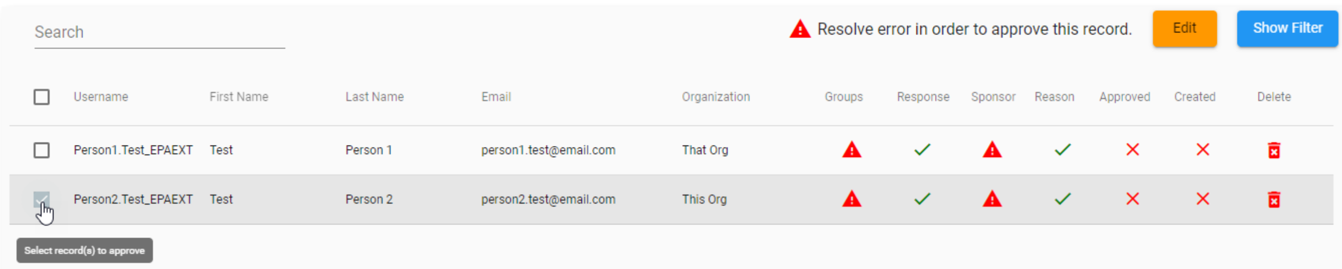


Figure 5 - View pending requests in the Approval List

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

1. GeoPlatform/GeoSecure username
2. Response or Project
3. Assigned coordinator (sponsor)
4. GeoPlatform groups
5. Reason for account creation

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

1. Response or Project
2. Assigned coordinator (sponsor)
3. GeoPlatform groups
4. Reason for account creation

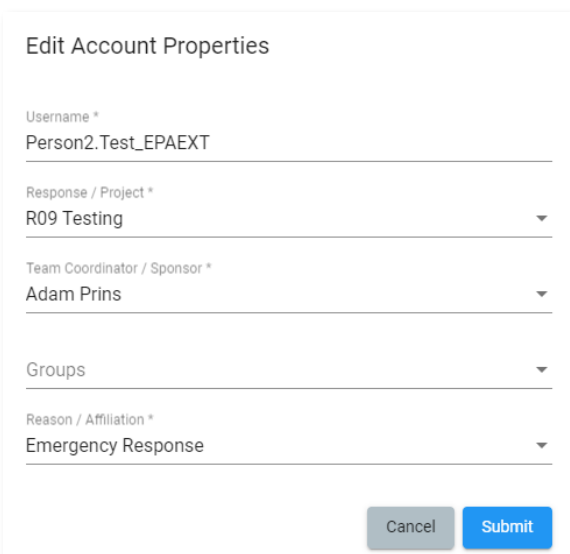


Figure 6 - Editing a single record allows you to edit the account username

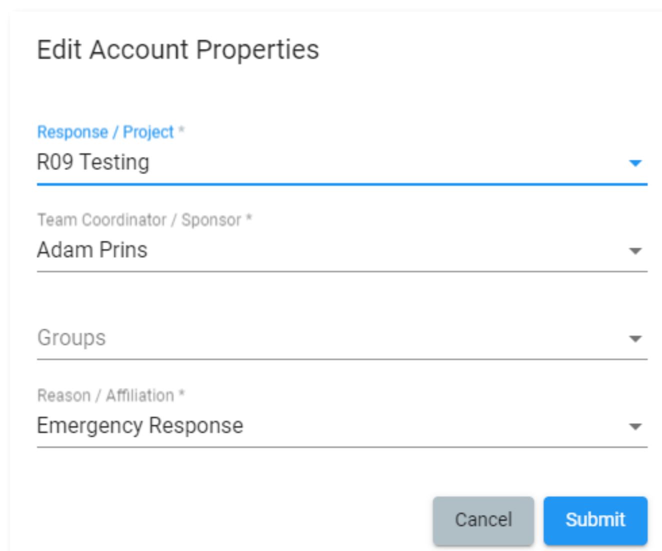


Figure 7 - When bulk editing, the same value(s) will be assigned to all the accounts selected

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

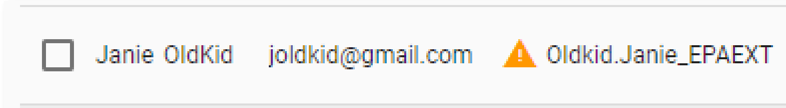


Figure 8 - An orange triangle indicates an account is already associated with the email

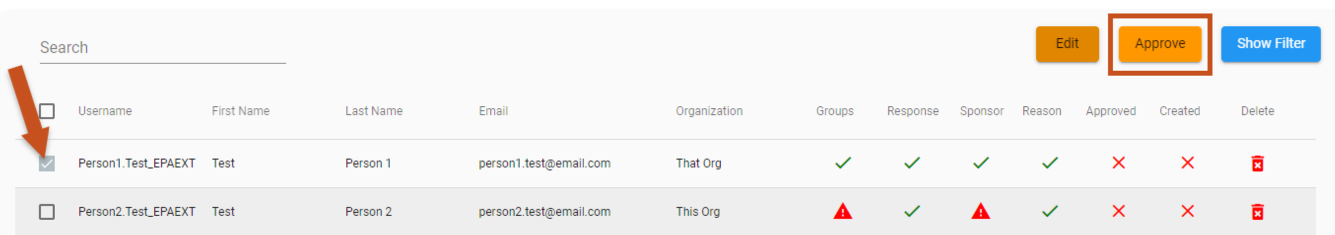
As a Team Coordinator, you can:

1. Approve the request as-is, creating a new account, or
2. Edit the Username to an existing username. This will result in the existing account being added to the relevant groups.

Once you review the requests and select appropriate groups, coordinators, and reason, click **Submit** to update the request(s).

Requestors may already have an 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, or the user may have forgotten their password and lost access. It is up to the Team Coordinator's discretion to decide if the user should have a new account created or reset access to an old account.

From the pending requests list, check the box to the left of the first name(s) again. Once all the required elements have been provided, the **Approve** button will appear, and the account can be created.



	Username	First Name	Last Name	Email	Organization	Groups	Response	Sponsor	Reason	Approved	Created	Delete
☑	Person1.Test_EPAEXT	Test	Person 1	person1.test@email.com	That Org	✓	✓	✓	✓	✗	✗	
☐	Person2.Test_EPAEXT	Test	Person 2	person2.test@email.com	This Org	⚠	✓	⚠	✓	✗	✗	

Figure 9 - Click Approve to create the new account(s)

You will then be prompted to choose a method of password creation: email or manual. The **Send Email Invitation(s)** method will send a generic message to the email listed in the account request. The user will be prompted to set a password to finalize their account before gaining access to any groups or content.

The **Set Password Manually** option allows you to provide a password for the new account. If you do so, 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.

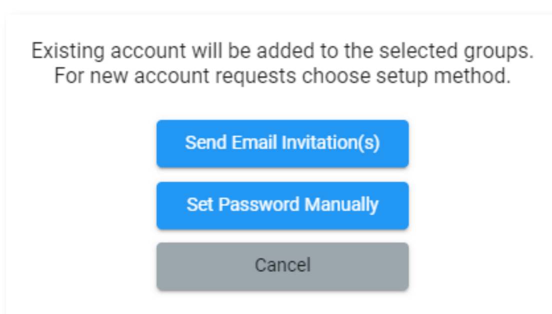


Figure 10 - Password creation options

If an account was requested by mistake or is no longer needed, use the delete button to remove the request completely. This will not affect existing GeoPlatform accounts. It will only remove the request from the tool.

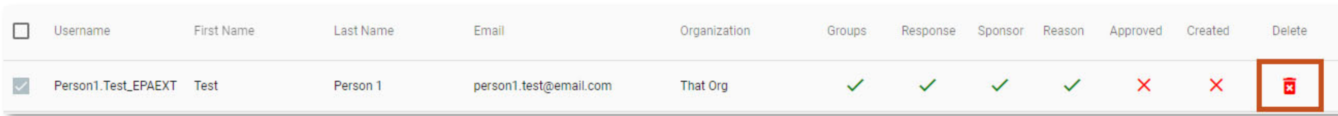


Figure 11 - Use the Delete button to remove unneeded requests from the tool

By default, the Team Coordinator view shows only pending requests (Created is False). To view all requests, or view those already created and approved, click **Show Filter** on the right side. Select True in the **Approved & Created** drop-down to see processed records, or click **Clear All** to see all requests. If you are a Team Coordinator for multiple projects, use the Response/Project filter to select the relevant project.

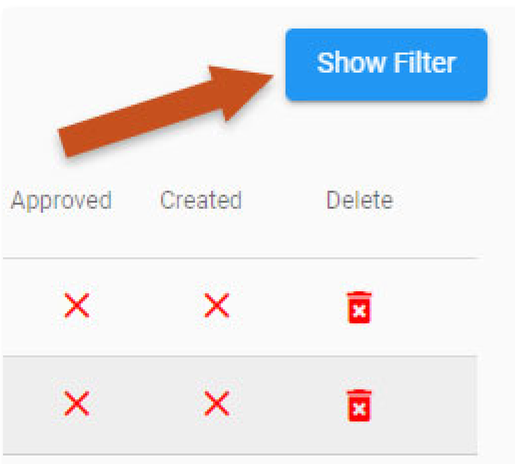


Figure 12 - Click Show Filter to see the available filters

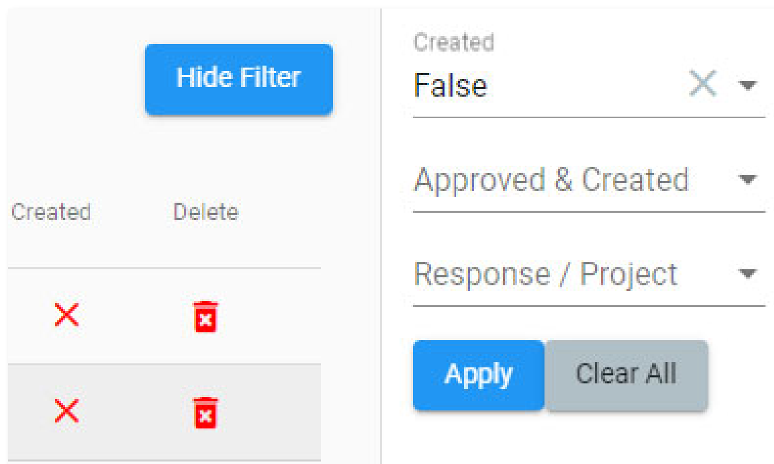


Figure 13 - By default, the Created Filter is set to False, showing only pending requests

Contact the Administrators

EPA GeoServices administers the Request Tool. Contact geoservices@epa.gov for support with the tool or any additional questions.