GeoPlatform Account Request Tool User Guide

June 2020

The GeoPlatform Account Request Tool is a web-based tool used to rapidly provision 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.

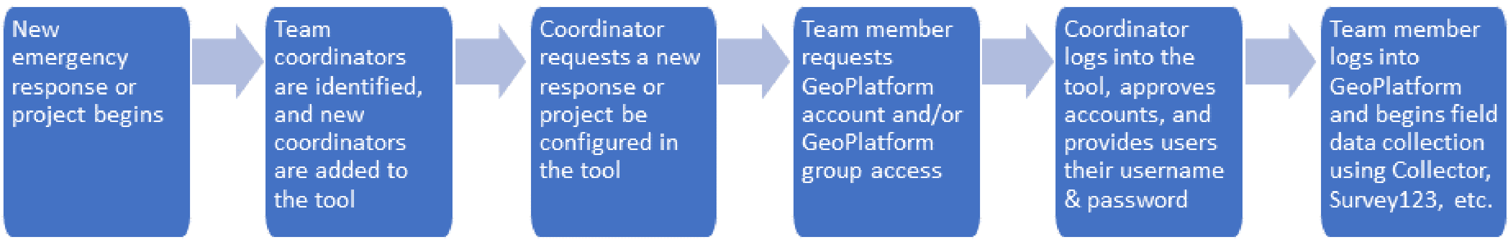
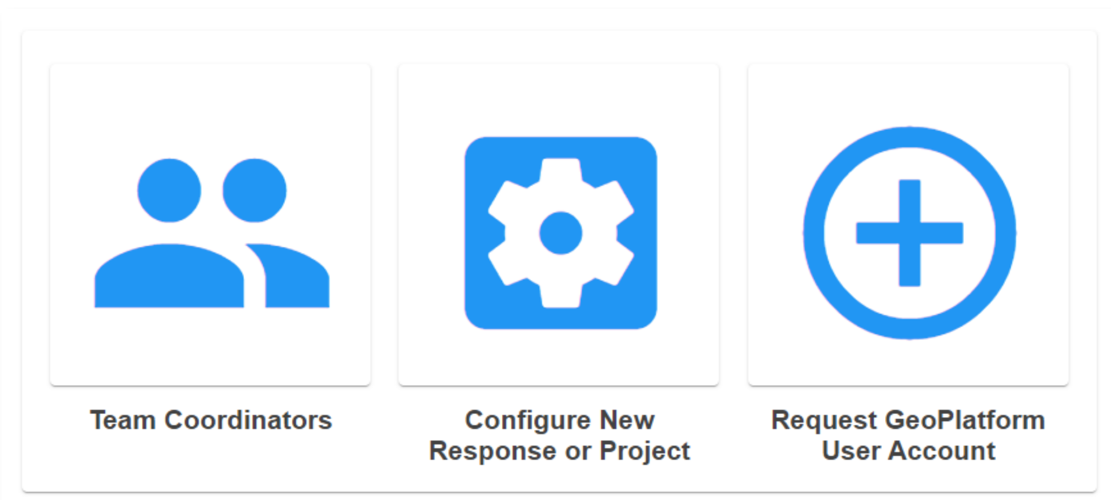


Figure 1. Overview of the Account Request Tool process

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 and a list of corresponding Team Coordinators who have permission to provide users access to those groups in the Account Request Tool.



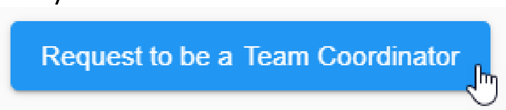
Use the tool to:

(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.

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

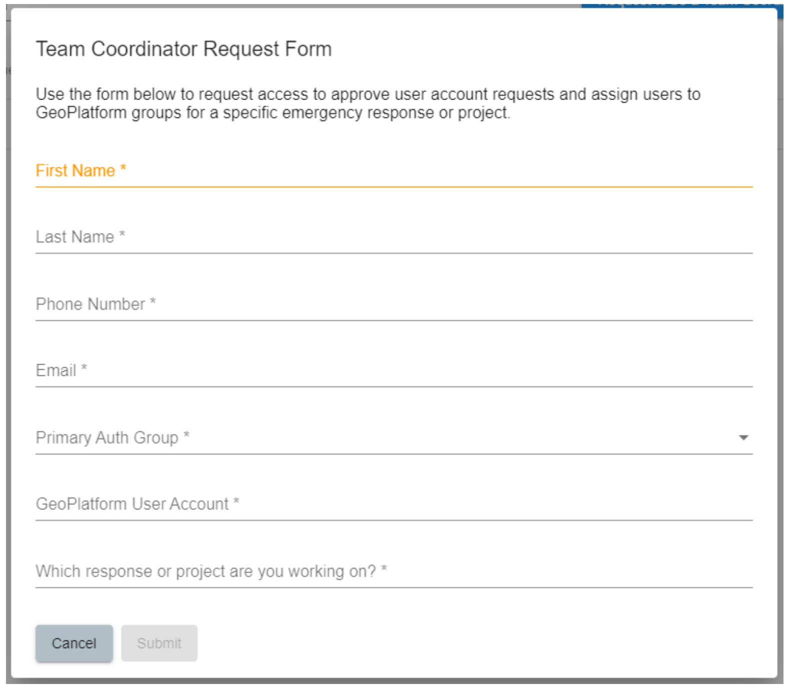


Figure 2. Fill out the Team Coordinator Request Form

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.

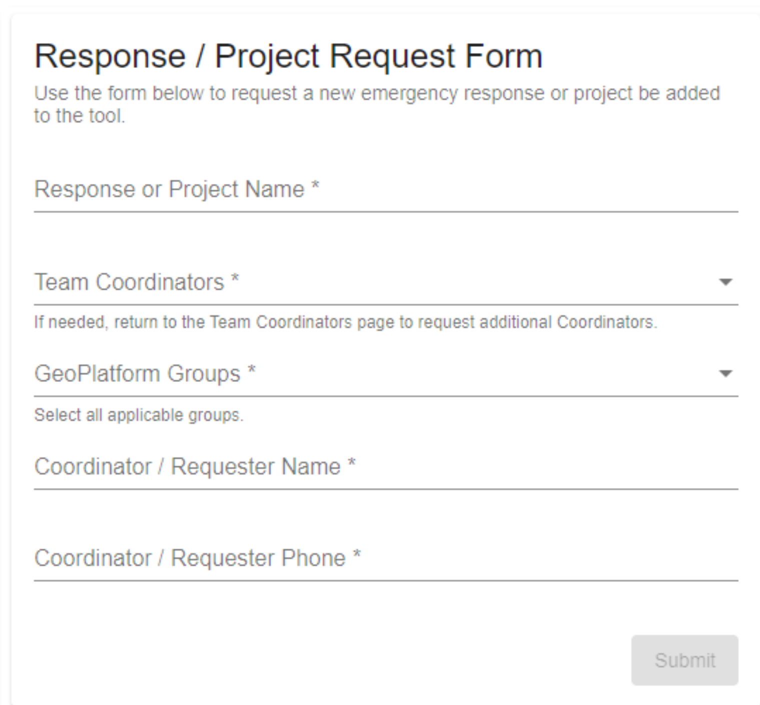


Figure 3. Fill out the Response/Project Request Form

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.

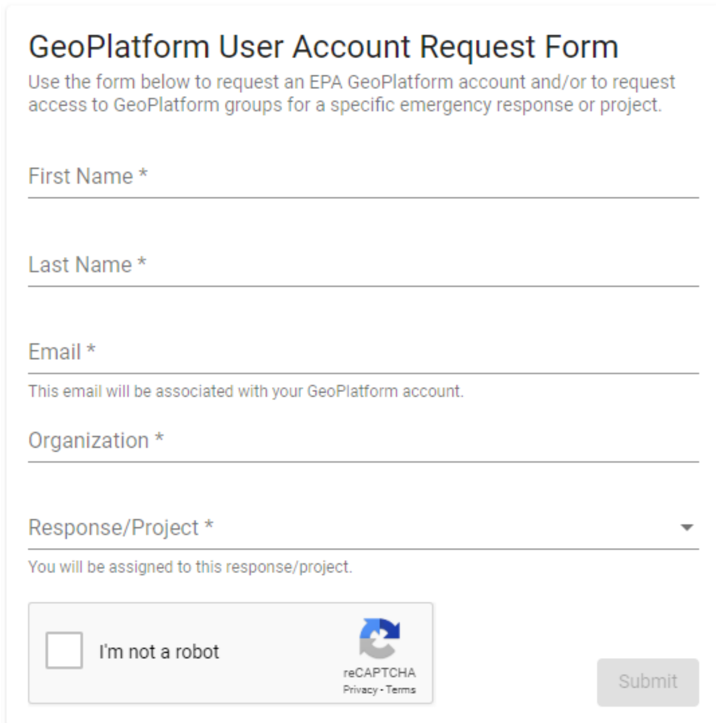


Figure 4. Fill out the GeoPlatform User Account Request Form

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.

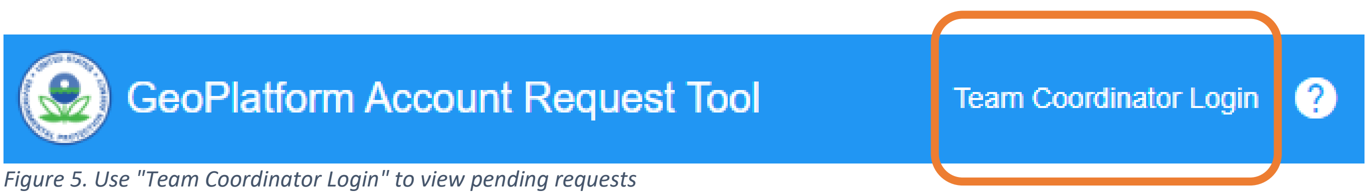
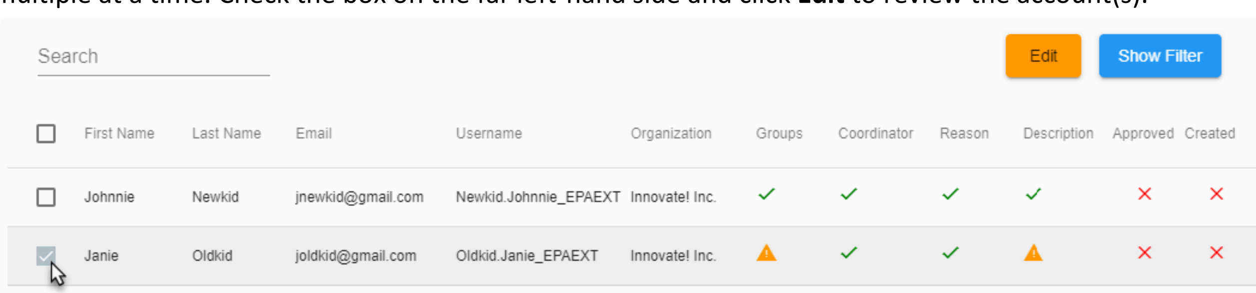


Figure 5. Use "Team Coordinator Login" to view pending requests

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).



	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)

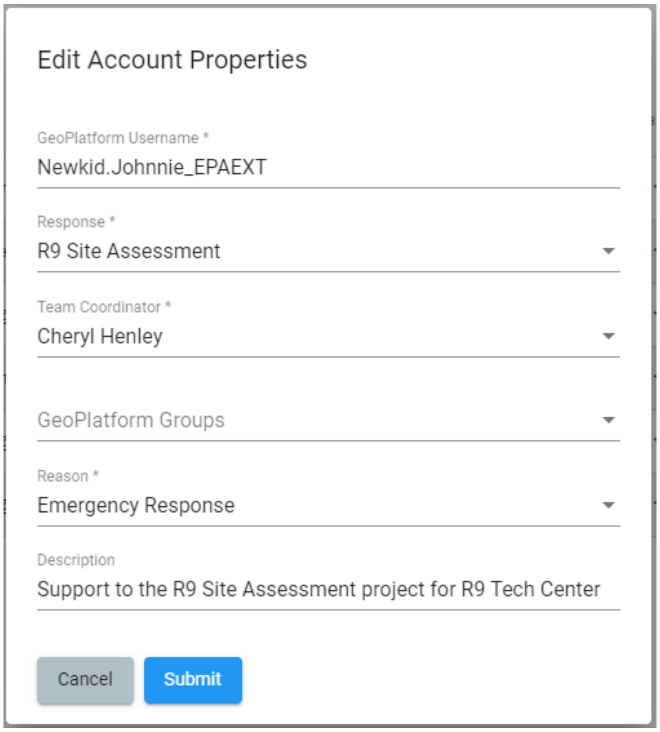


Figure 7. Editing a single record allows you to edit the GeoPlatform username

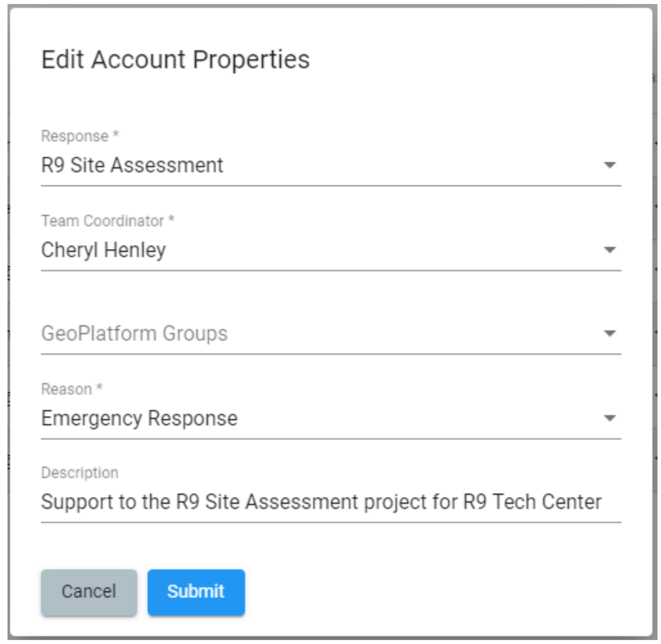


Figure 8. When bulk editing, the same value(s) will be assigned to all the accounts selected

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.

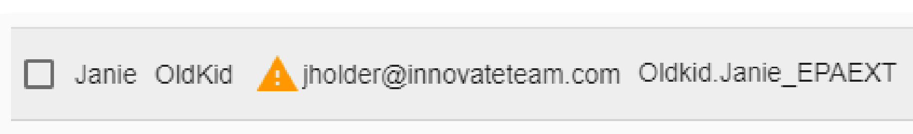


Figure 9. An orange triangle indicates an account is already associated with the email

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 forgetten 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 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.

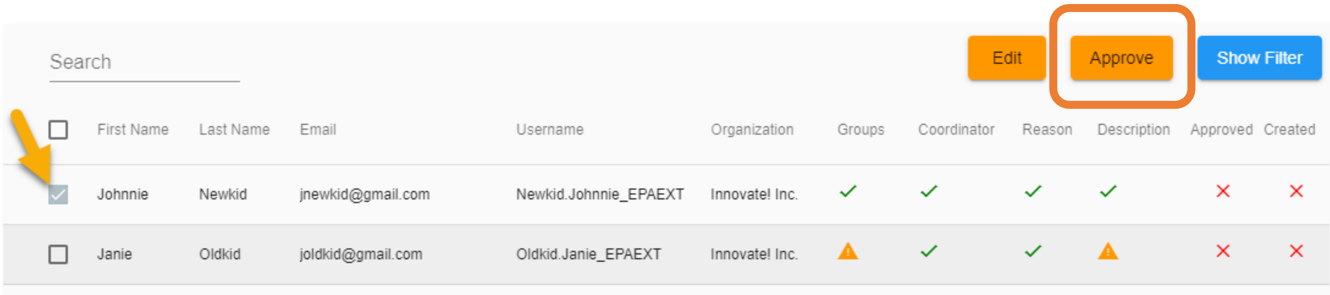


Figure 10. Click Approve to create the new account(s)

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.

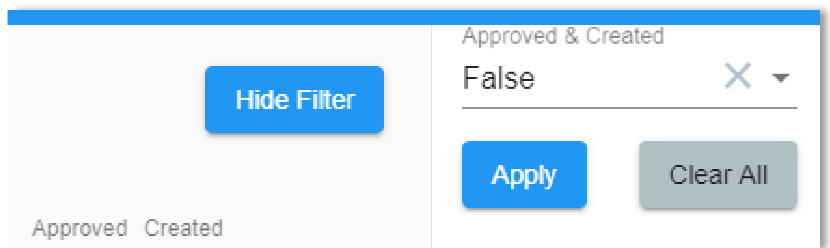


Figure 11. By default, the Approved & Created Filter is set to False, showing only pending requests

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.