# GeoPlatform Account Request Tool User Guide

July 2022

The GeoPlatform Account Request Tool is a web-based tool to rapidly provision EPA GeoPlatform user accounts. **Team Coordinators** 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.

Use the tool to:

(1) Establish a new Response or Project Team for use in the Request Tool
(2) Request or approve requests for GeoPlatform accounts

## Establish a New Response/Project

To begin, click **Configure a New Response/Project** button on the home page. If you are not already logged into the GeoPlatform, you will be prompted to do so.

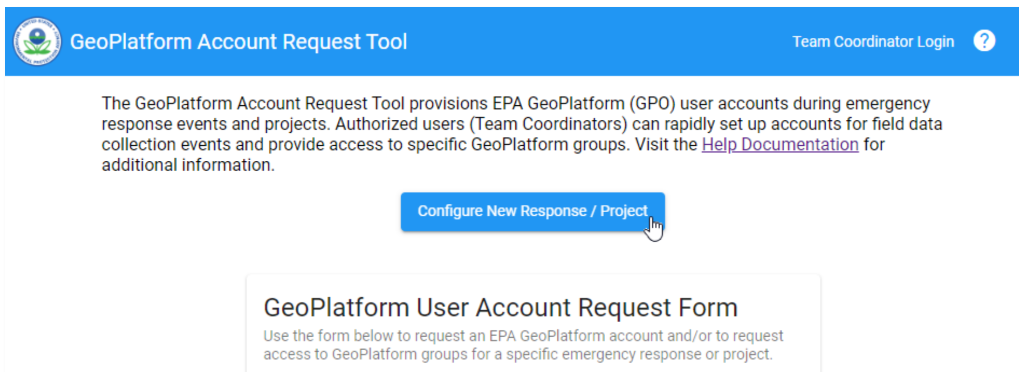


*Figure 1. Use the Configure New button on the home page to request a new Response/Project*

Once you are logged in, 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.

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

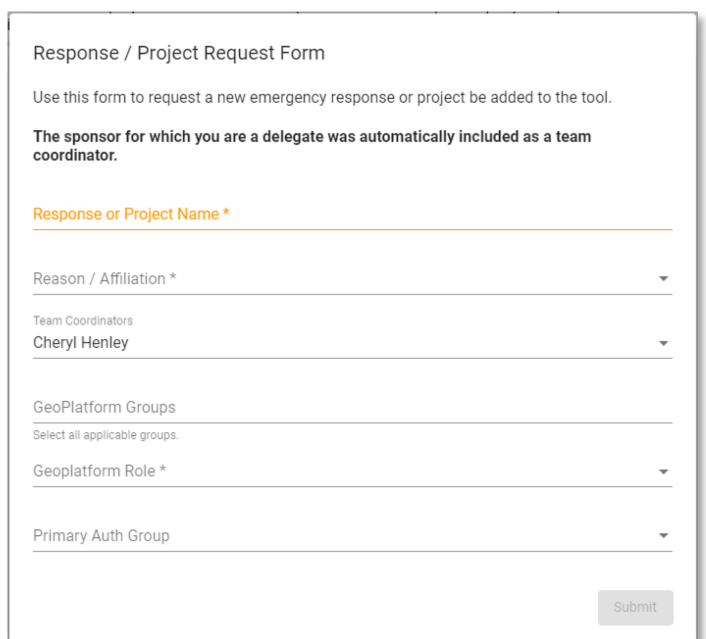


*Figure 2. Use the form to request a new Response/Project*

## Request GeoPlatform User Accounts

Fill out the **GeoPlatform 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 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.

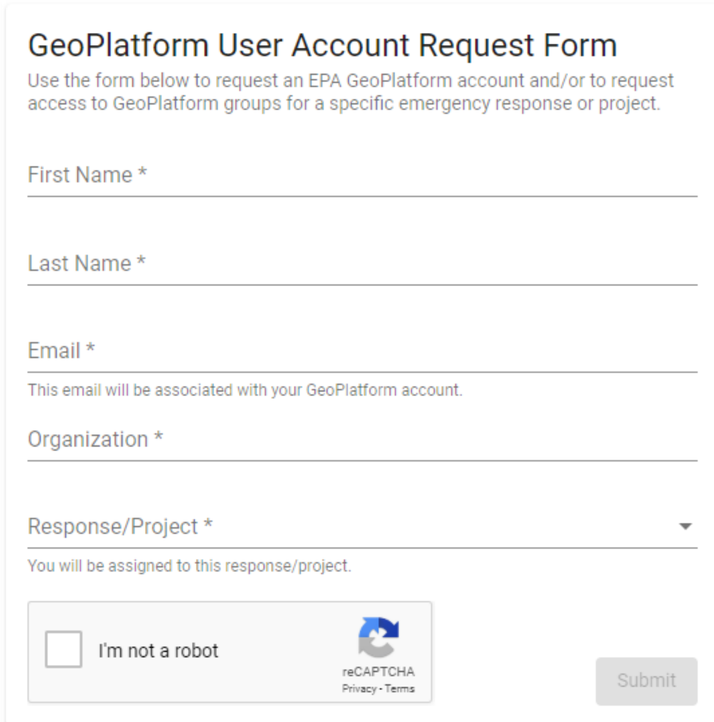


*Figure 3. Fill out the GeoPlatform User Account Request Form*

## 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.

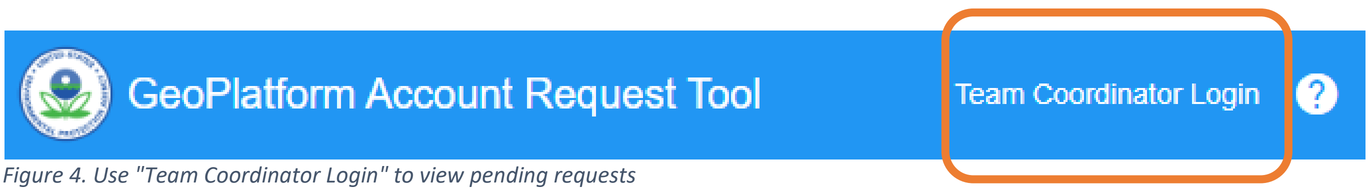


*Figure 4. Use "Team Coordinator Login" to view pending requests*

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).

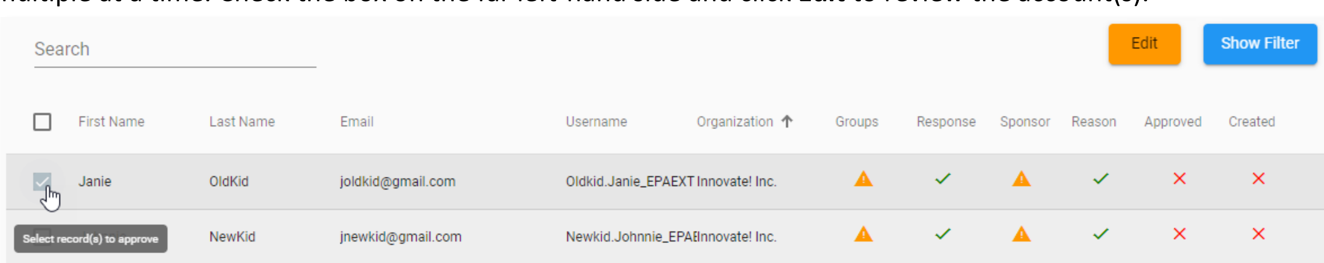


*Figure 5. View pending requests in the Approval List*

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

1. GeoPlatform 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

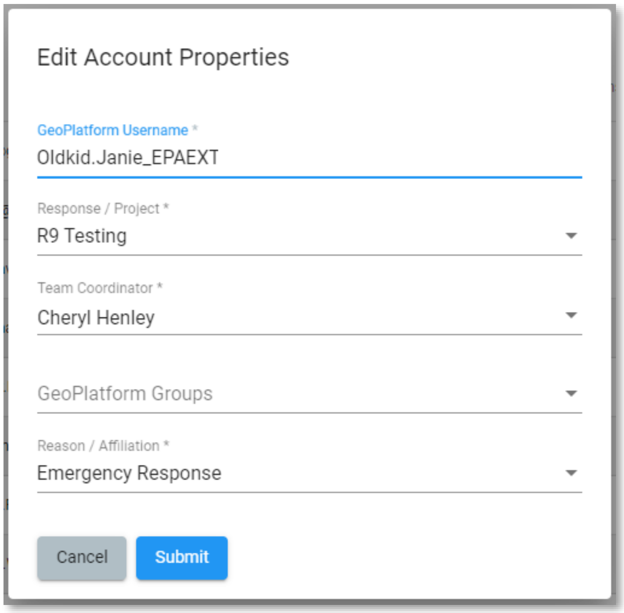


*Figure 6. Editing a single record allows you to edit the GeoPlatform username*

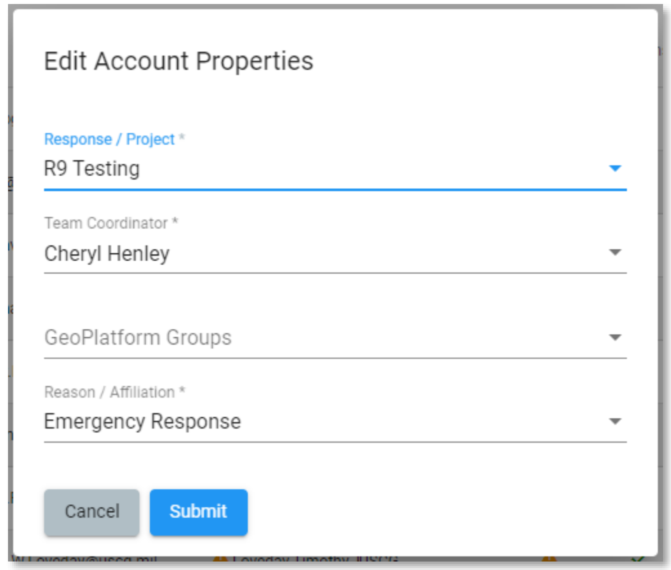


*Figure 7. When bulk editing, the same value(s) will be assigned to all the accounts selected*

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

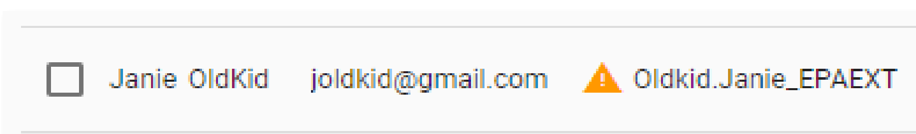


*Figure 8. An orange triangle indicates an account is already associated with the email*

As a Team Coordinator, you can:

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

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

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.

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.

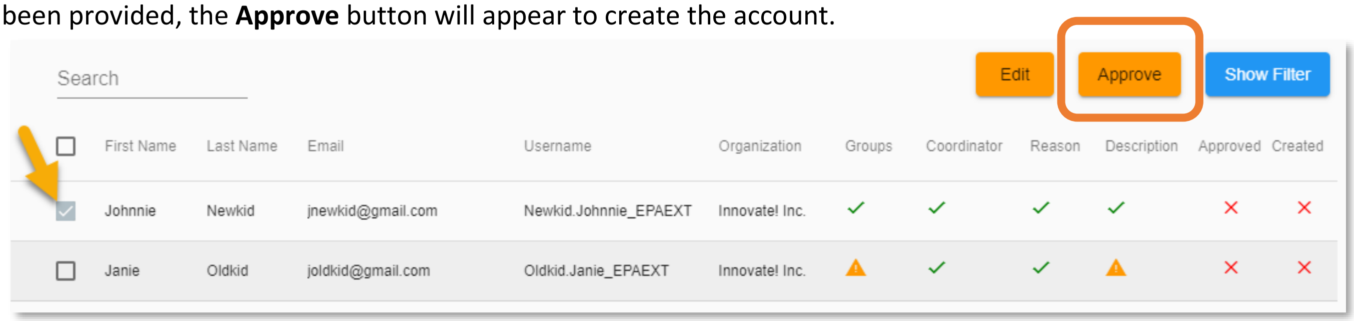


*Figure 9. Click Approve to create the new account(s)*

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.

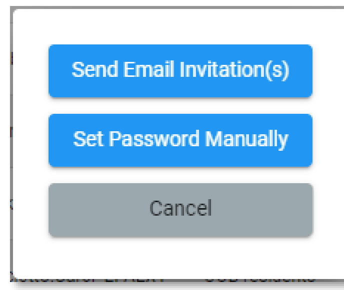


*Figure 10. Password creation options*

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.

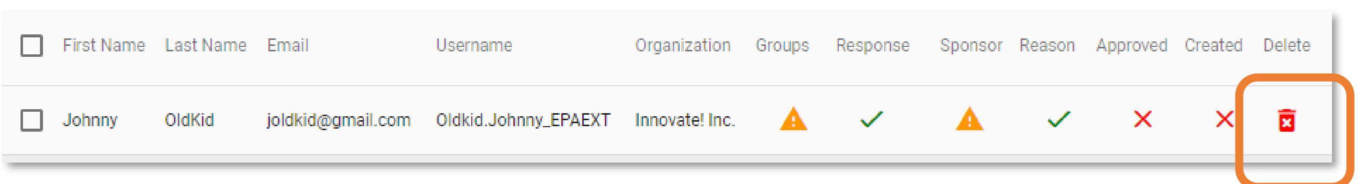


*Figure 11. Use the Delete button to remove unneeded requests from the tool*

By default, the Team Coordinator view shows only pending requests (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.

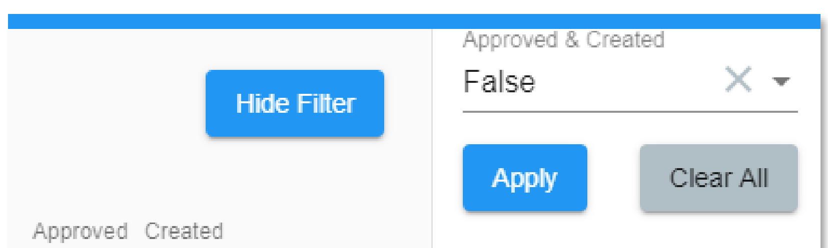


*Figure 12. By default, the Approved & Created Filter is set to False, showing only pending requests*

## 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.