# GeoPlatform Account Request Tool User Guide
# FOR ADMINISTRATORS

September 2020

The [GeoPlatform Account Request Tool]() is a web-based tool to rapidly provision EPA GeoPlatform user accounts. Administrators are responsible for configuring the tool for new users (Team Coordinators/Sponsors and Delegates) and corresponding Responses/Projects.

## Add Sponsors & Delegates

From the Tool Administration page, 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 user. The user can be a Team Coordinator/Sponsor or Delegate.

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 user.
3. Click **Save** to continue setting up the account.

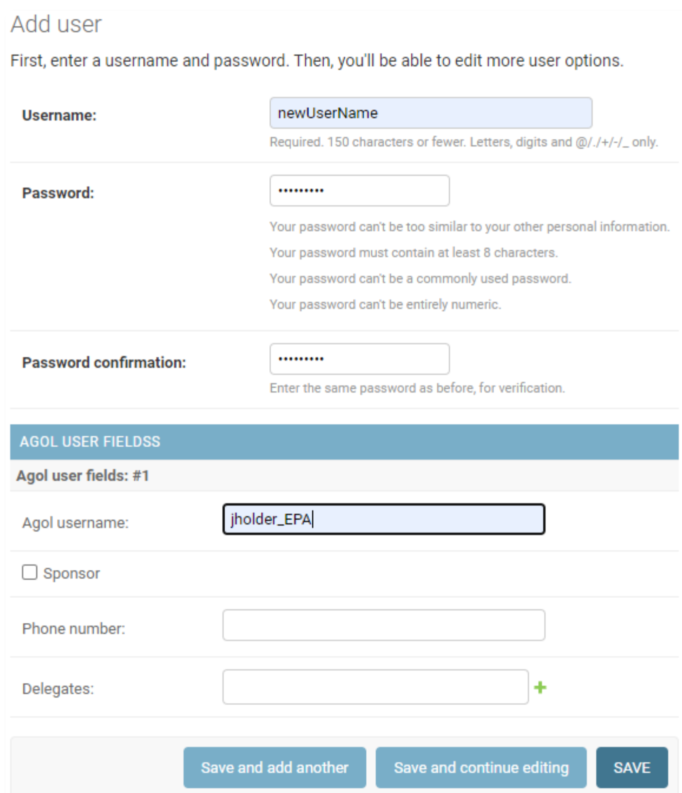



*Figure 1. Provide a Username, Password, and Agol username to continue setting up an account*

4. In the **Personal info** section, provide the user's First name, Last name, and Email address.
5. In the **Permissions** section, select the "Sponsors and Delegates (required to edit/approve)" option from the Available Groups list and use the right arrow to assign it to the user.

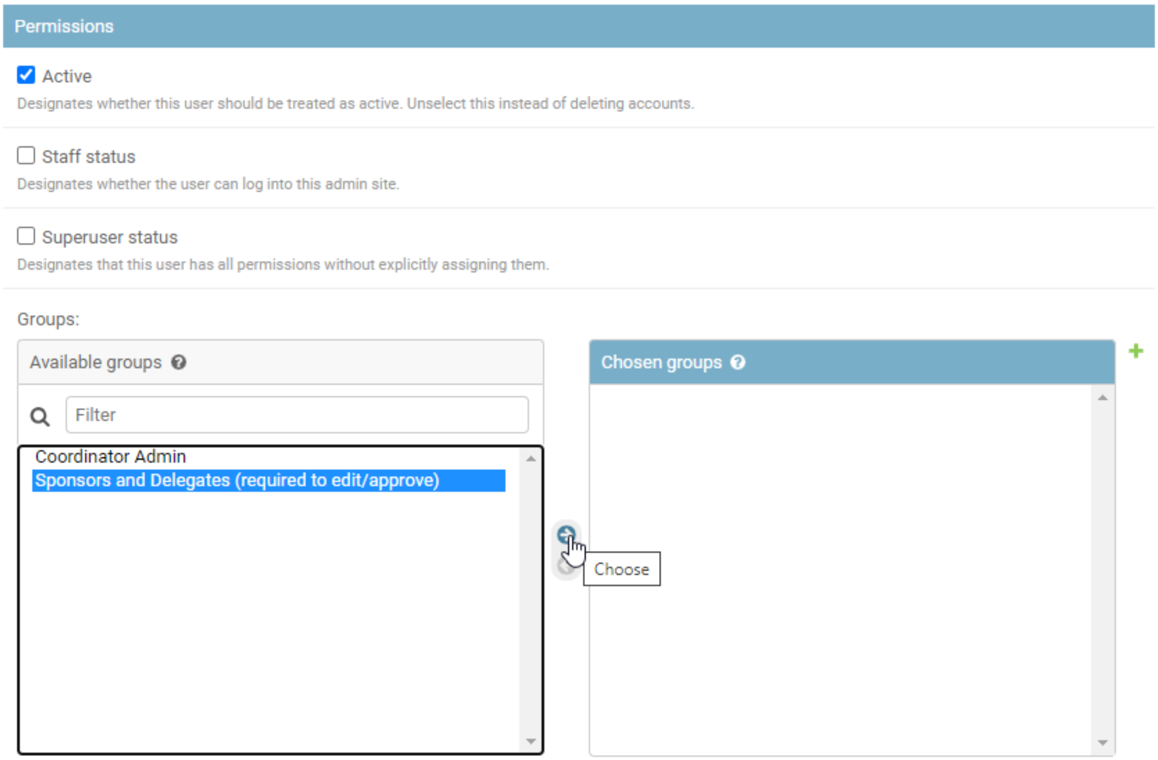
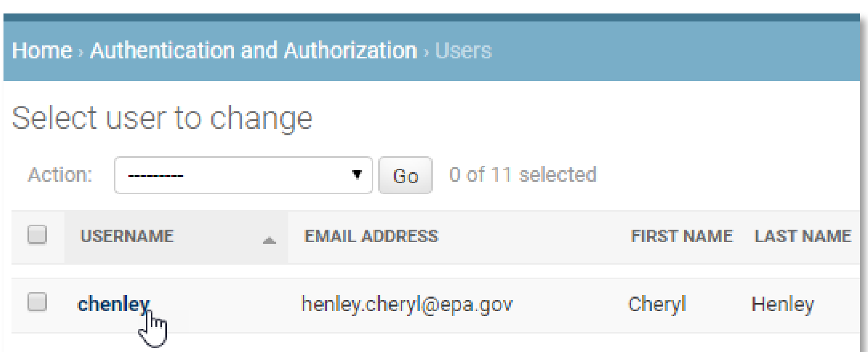
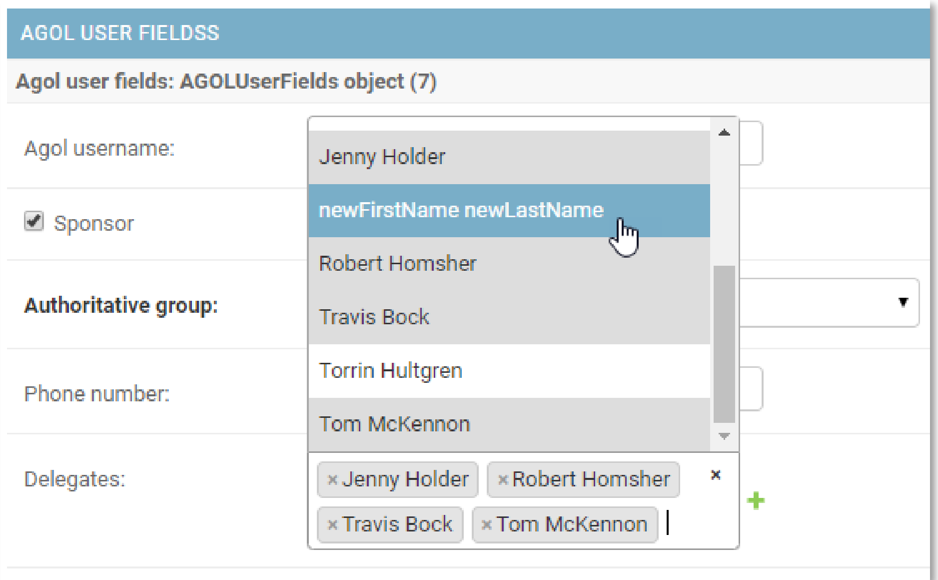



*Figure 2. Use the right arrow to assign a user to the Sponsors and Delegates Group*

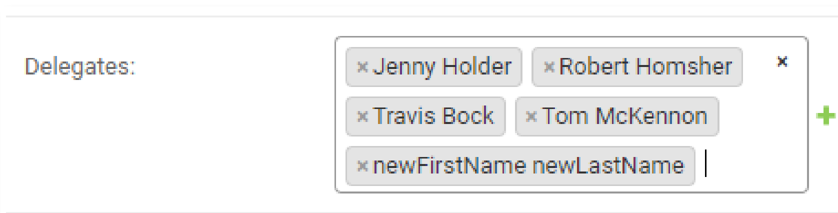
6. If the user is a Sponsor, check the **Sponsor** checkbox in the AGOL User Fields section at the bottom of the page: ☑ Sponsor
    a. A Sponsor is an EPA personnel member who can sponsor users in the GeoPlatform Dashboard ([https://igeo.epa.gov/gpdashboard/](https://igeo.epa.gov/gpdashboard/)).
    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 user is a Delegate, click **Save** and continue to step 9.
7. Click **Save** to finish adding the user.
8. Repeat steps 1-7 until all users have been added.
9. If the user 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:




b. Select the Delegate from the list to assign them to the Sponsor. This user 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 the permissions of the Sponsor.

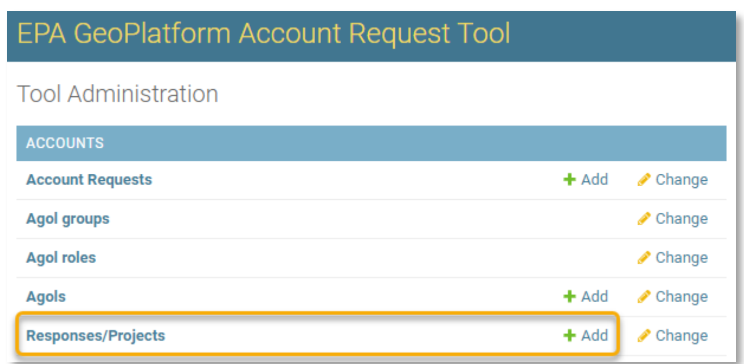



## Add a Response/Project

A **Response/Project** is comprised of a list of GeoPlatform groups and corresponding Team Coordinators.

Team Coordinators assigned to a Response/ Project approve account requests and assign accounts to the specific GeoPlatform groups associated.

To configure a new incident, select the + Add button next to the Responses/Groups in the Accounts section of the Tool Administration page (*right*).



## Add a Response/Project

1. In the Add Response/Project form, provide a meaningful **Name** for the Team prefixed with the Authoritative Group abbreviation (i.e. R9, OW, etc.).
2. Select all applicable GeoPlatform groups from the **GeoPlatform Assignable groups** section. Every user assigned to the response will be able to add users to these groups.
3. Select the **GeoPlatform Role**. All accounts approved through the tool will automatically be assigned this role in the GeoPlatform.
4. Select the **GeoPlatfrom Authoritative Group**. All accounts approved through the tool will automatically be added to this management group in the GeoPlatform.
5. Select the **Sponsor** (Team Coordinator). All Delegates associated with this Sponsor will be able to approve accounts associated with this Response/Project.

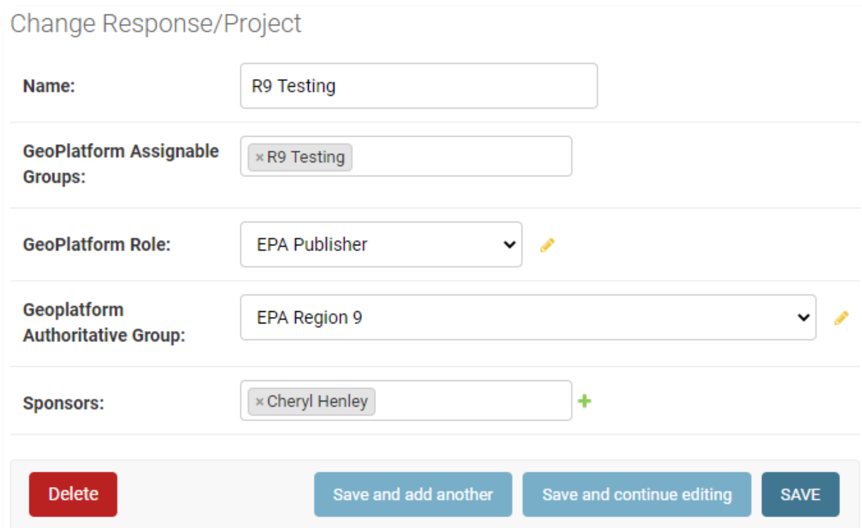



*Figure 3. Provide responses to all fields to configure a Response/Project*

## Notify Team Coordinators

Once the tool and users have been configured for a new response, notify the requestor that the tool is ready.

## Additional Support

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.