



County of San Diego

DEPARTMENT OF ENVIRONMENTAL HEALTH
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ADDING ADDITIONAL CERS USERS AND CHOOSING PERMISSION LEVELS

Note: You must be a lead user to be able to add additional users.

1. Visit the [CERS Business Portal](#) and sign in using your username and password.
2. From your home page, click on the **People/Users** button:

The screenshot shows the home page for 'KR Shop'. Under the 'Common Tasks' section, there are four buttons: 'Start Facility Submittal', 'Add Facility', 'People/Users', and 'Contact Your Local Regulator(s)'. The 'People/Users' button is highlighted with a red border.

3. Click on **Add Person**

The screenshot shows the 'People' management interface. At the top right, there is a green 'Add Person' button highlighted with a red box. Below it is a table with columns for First Name, Last Name, Email, Title, and Account Status.

4. **Type in the email address** (twice) for the person you want to add and click **Continue**.

The screenshot shows the 'Add Person' form. It prompts the user to 'Provide the email address of the person you want to add to the Business KR Shop.' There are two input fields for 'Email' and 'Confirm Email', both highlighted with a red box. A 'Continue' button is also highlighted with a red box.

5. The next steps will vary depending on whether or not this person has already created a user account.
 - A) If you see an Identification Information box like the one on the left:
 - Enter the person's full name, phone number, and title. Click **Continue** and move on to steps 6-8 on the next page.
 - B) If you see the Summary box like the one on the right with a message above letting you know they already have a cers user account (this does not mean they already have access);
 - Enter their phone number and title. Click **Continue** and skip to step 9 on the last page.

The screenshot shows the 'Identification Information' form for 'Business: KR Shop (ID: 45240)'. The form fields are: First Name (Bob), Last Name (Smith), Email (newbiecers@gmail.com), Phone ((555) 123-4789), and Title (Consultant). Red text annotations read: 'A) NO ACCOUNT YET, ENTER INFORMATION AND PROCEED TO STEPS ON NEXT PAGE'. A 'Continue' button is highlighted with a red box.

The screenshot shows the 'Summary' form with a warning message: 'This person is already known to CERS. To add this person to the Business KR Shop select "Continue".' The form fields are: Full Name (grissel garcia), Email (newcers@gmail.com), Phone, and Title. Red text annotations read: 'B) HAS ACCOUNT, ENTER INFORMATION AND SKIP TO STEP 9 ON LAST PAGE'. A 'Continue' button is highlighted with a red box.

- Since this person does not have a CERS user account yet, click on **Initiate Invite** to invite them to create and account. Then click **Save**.

Summary

Identification Information

First Name: Bob, Last Name: Smith, Email: newbiecers@gmail.com

Additional Information for KR Shop

This information for **Bob Smith** is specific to **KR Shop**

Phone: (555) 123-4789, Title: Consultant

Account Information

No Account **Initiate Invite**

Save **Delete** **Cancel**

- Select a permission group for the new user and scroll down to select **Save and Send Invitation**.

Setup New Account

Verify the information is correct select "Save & Send Invite", otherwise select "Cancel Invitation".

Verify Person's Information

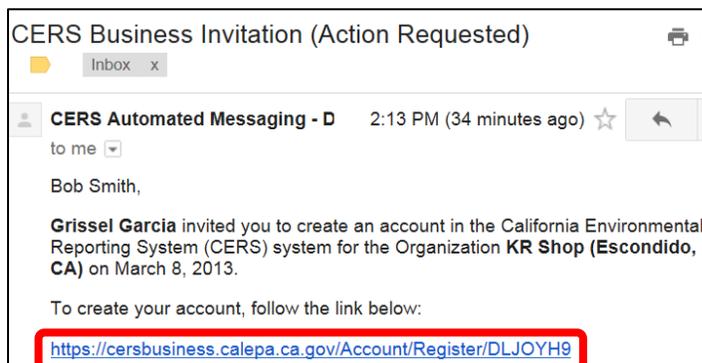
First Name: Bob, Last Name: Smith, Email: newbiecers@gmail.com

What permissions would you like to assign to this person?

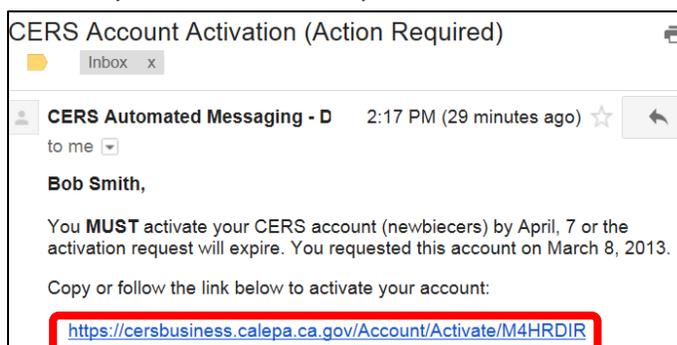
Permission Group	Description
<input type="checkbox"/> Approvers	Can add, view, edit, and submit facility reports to their facility's regulator(s).
<input type="checkbox"/> Editors	Can add/edit facility submittals/reports, but cannot submit reports to their facility's regulator(s).
<input type="checkbox"/> Lead Users	Can view/add/edit/submit facility reports to regulators, as well as add, remove, and otherwise manage their business' user accounts, facilities, and other data about their CERS business/organization.
<input type="checkbox"/> Viewers	Can view facility submittals/reports (read-only).

Save & Send Invitation **Cancel Invitation**

- Within minutes, the user you selected will get the following email and will need to **click on the link in the email**, fill out the CERS registration pages to create their own username and password.



They will then receive a second email with a new **link they must click on** in order to activate the account. Once they have done that they will have access the first time they sign in to CERS.



9. **Select their permission level** and click **Save**. Because this person already has a CERS account, they will not receive emails notifying that they have been granted access; they will simply see this facility in their home page the next time they sign in.

Summary

Identification Information

 The information below is shared by other Organizations and/or Regulators linked to an Account.

Full Name: grissel garcia [Edit](#) Email: newcers@gmail.com [Edit](#)

Additional Information for KR Shop

 This information for **grissel garcia** is specific to **KR Shop**

Phone: (555) 123-4789 Title: CERS Expert
(e.g., (999) 999-9999 x123)

Account Information

 Status: Active Username: newcers Last Sign-In Activity: 2/27/2013 at 1:13 PM to the CERS Business portal [View more...](#)

Assigned Permissions

Permission Group	Description
<input type="checkbox"/> Approvers	Can add, view, edit, and submit facility reports to their facility's regulator(s).
<input type="checkbox"/> Editors	Can add/edit facility submittals/reports, but cannot submit reports to their facility's regulator(s).
<input checked="" type="checkbox"/> Lead Users	Can view/add/edit/submit facility reports to regulators, as well as add, remove, and otherwise manage their business' user accounts, facilities, and other data about their CERS business/organization.
<input type="checkbox"/> Viewers	Can view facility submittals/reports (read-only).

[Save](#) [Delete](#) [Cancel](#)