



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 'Common Tasks' section of the CERS Business Portal. It includes links for 'Start Facility Submittal', 'Add Facility', 'People/Users' (which is highlighted with a red box), and 'Contact Your Local Regulator(s)'. The 'People/Users' link is described as allowing/manage other people in your business who need to view or edit your facility reporting.

3. Click on **Add Person**

The screenshot shows the 'People' page with a search bar and filter options for First Name, Last Name, Email, Title, and Account Status. The 'Add Person' button is highlighted with a red box.

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

The screenshot shows the 'Add Person' page where the user is prompted to provide the email address of the person to be added. The 'Email' and 'Confirm Email' fields are highlighted with a red box. The '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' page for a new user. The 'First Name' field is 'Bob' and 'Last Name' is 'Smith'. The 'Email' field is 'newbiecers@gmail.com'. The 'Continue' button is highlighted with a red box.

The screenshot shows the 'Summary' page for an existing user. A warning message states: 'This person is already known to CERS. To add this person to the Business KR Shop select "Continue".' The 'Full Name' field is 'grissel garcia' and the 'Email' field is 'newcers@gmail.com'. The 'Continue' button is highlighted with a red box.

6. 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**.

Identification Information

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

Additional Information for KR Shop

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

Phone	Title
(555) 123-4789 (e.g., (999) 999-9999 x123)	Consultant

Account Information

No Account	Initiate Invite
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Save **Delete** **Cancel**

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

Verify Person's Information

First Name	Last Name	Email
Bob	Smith	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**

8. 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.

CERS Business Invitation (Action Requested)

CERS Automated Messaging - D 2:13 PM (34 minutes ago)

to me

Bob Smith,

Grissel Garcia invited you to create an account in the California Environmental Reporting System (CERS) system for the Organization KR Shop (Escondido, CA) on March 8, 2013.

To create your account, follow the link below:

<https://cersbusiness.calepa.ca.gov/Account/Register/DLJOYH9>

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.

CERS Account Activation (Action Required)

CERS Automated Messaging - D 2:17 PM (29 minutes ago)

to me

Bob Smith,

You **MUST** activate your CERS account (newbiecers) by April, 7 or the activation request will expire. You requested this account on March 8, 2013.

Copy or follow the link below to activate your account:

<https://cersbusiness.calepa.ca.gov/Account/Activate/M4HRDIR>

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	Email Edit newcers@gmail.com	Edit
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Additional Information for KR Shop

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

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