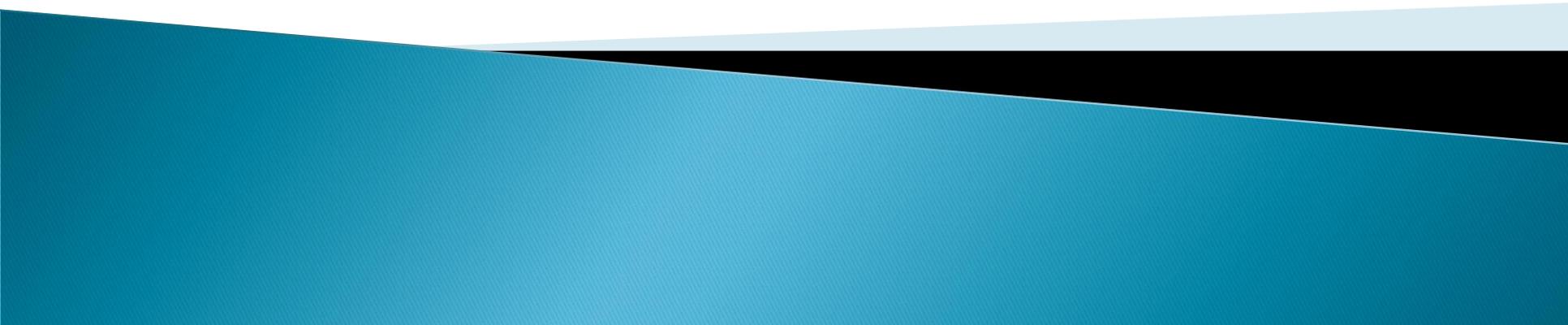


CERS2 Implementation Update

CERS Regulator User Group July 12, 2011

Chris Allen

Technology Services Manager, Cal/EPA Unified Program



Overview

- ▶ CERS2 Implementation/Schedule
- ▶ CERS2 “Organizations”

CERS2 Implementation/Schedule

- ▶ Development team very busy!
- ▶ Early July
 - Updated Data Dictionary changes released
- ▶ Mid-July
 - Final draft XML data exchange schemas released for public comment
- ▶ August
 - Final XML data exchange schemas released
 - CERS2 screen mockups to select testers

CERS2 Implementation/Schedule

- ▶ September 29
 - Begin freeze of adding new users until CERS2
- ▶ October 21–31
 - CERS1 closed for 7 business days for data migration
- ▶ October 31
 - CERS2 business and regulator portals open for use
 - Release includes “training” versions of both portals
- ▶ Mid–January 2012
 - XML data exchange for CUPAs becomes available
- ▶ Throughout 2012
 - Many CUPAs “seed” (load) facility data into CERS2

CERS2 Implementation/Schedule

- ▶ Some features added **after** CERS2 rollout
 - Due to state budget/contracting/personnel issues
- ▶ Cal/EPA maintains public web site of prioritized “features to be added”
 - Some critical priorities set by Cal/EPA
 - Remainder discussed/set by CERS Change Management Committee
 - CBUG should discuss/recommend priorities to CMC
- ▶ Discuss potential addition of Business XML data exchange in Q1 2012
 - No interest in XML data exchange so far...

CERS2 “Organizations”

Supporting businesses with multiple facilities

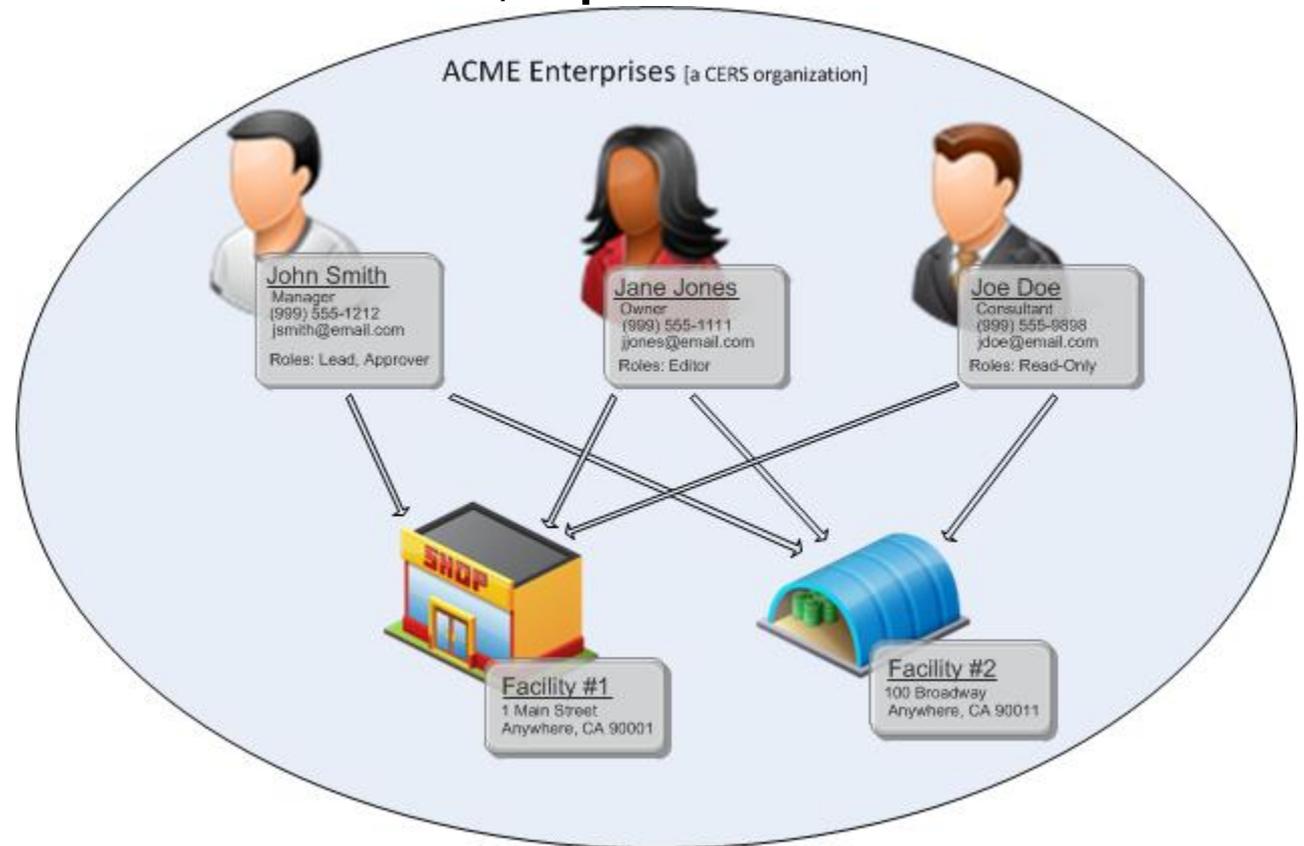
NEW to CERS2!

The Problem: User Security Management

- ▶ CUPAs and Cal/EPA must ensure only authorized users edit/submit a facility's data.
- ▶ 10,000–20,000 businesses have more than one facility regulated under Unified Program.
- ▶ CERS1 security model: *User rights by facility*
 - Costly to UPAs and Cal/EPA to administrate
 - Burdensome for businesses with many facilities.
- ▶ **Solution:** CERS2 introduces “Organizations”
 - *User rights assigned to Organization with 1+ facilities*

CERS2 “Organizations”

- ▶ Organizations allow a set of users to manage *multiple* facilities owned/operated by a *single* business.



CERS2 “Organizations”

- ▶ Every facility belongs to only one Organization
- ▶ Every CERS2 business user must be associated with at least one Organization.
- ▶ Organizations typically would be corporations or other legal entities with multiple facilities.
 - However, no specific/required definition beyond “a collection of users that can manage a collection of facilities”
 - Allows regional management of facilities by different sets of users: e.g., ACME Enterprises South, ACME Enterprises North

Organizations & User Security

- ▶ A user's security rights applies to ALL facilities associated with an Organization
 - **Viewer:** View facility information (read only)
 - **Editor:** View/edit facility information (no submit)
 - **Approver:** View/edit/submit facility information
 - **Lead User:** View/edit/submit facility information plus manage the Organization's users.
- ▶ A user can belong to multiple Organizations (e.g., consultants)
- ▶ Large multi-facility businesses may want to consider best approach for Organizations

Setting up CERS2 Organizations

- ▶ Cal/EPA seeking letters from multi-facility businesses this summer indicating existing CERS1 facilities in their Organization.
 - More information on letter format in coming weeks.
- ▶ CERS1 facilities with no Organization information will be migrated to CERS2 as a new Organization with a single facility.

Managing CERS2 Organizations

- ▶ Cal/EPA & UPAs tools to move/merge facilities into Organizations.
 - ▶ Businesses normally need to mail letterhead request to change a facility's Organization.
 - ▶ Cal/EPA will manage largest Organizations.
 - ▶ CUPAs will manage smaller Organizations.
 - CUPA with majority of an Organization's facilities will be automatically assigned the lead.
 - Managing small Organizations still in process.
- 

CERS2 New User Wizard

How users will be guided toward
Organizations in CERS2

CERS2 New User Wizard

You have created a CERS Key account and successfully signed into CERS. This makes you a User. You have completed this step.



CERS2 New User Help Screens



CERS2 New User Help Screens

Then you can begin adding facilities.



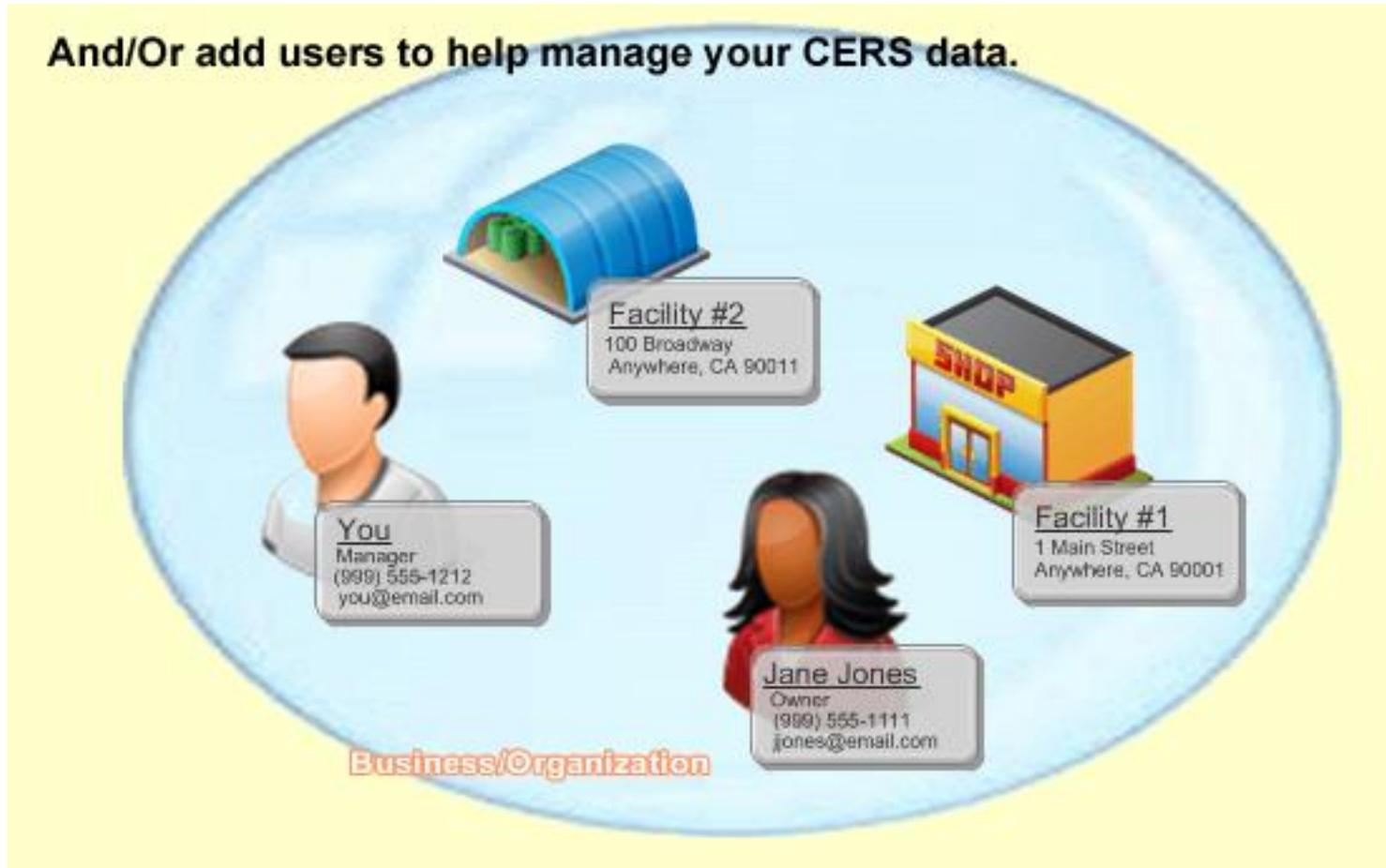
CERS2 New User Help Screens

As your Business/Organization grows, you may add more facilities...



CERS2 New User Help Screens

And/Or add users to help manage your CERS data.



Questions?

Please contact:

- ▶ CERS Help Center
- ▶ Dan Firth

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