How to Manage Users for Your Business/Organization

Question: How can I manage users (add, delete, or modify permissions) for my Organization/business in the CERS Business Portal?

Answer: Any person with **Lead User** permissions 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 Organization/business.

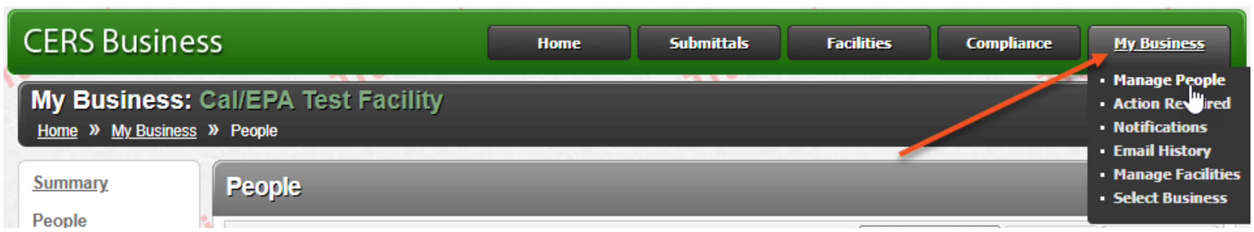
How to view your Permissions in the CERS Business Portal:

After signing in to the CERS Business Portal (see Steps 1-2 below) select “My Business” from the menu bar (located at the top of each page), then scroll down to locate your name under “People”. Select your name to view your permissions to the organization/business.

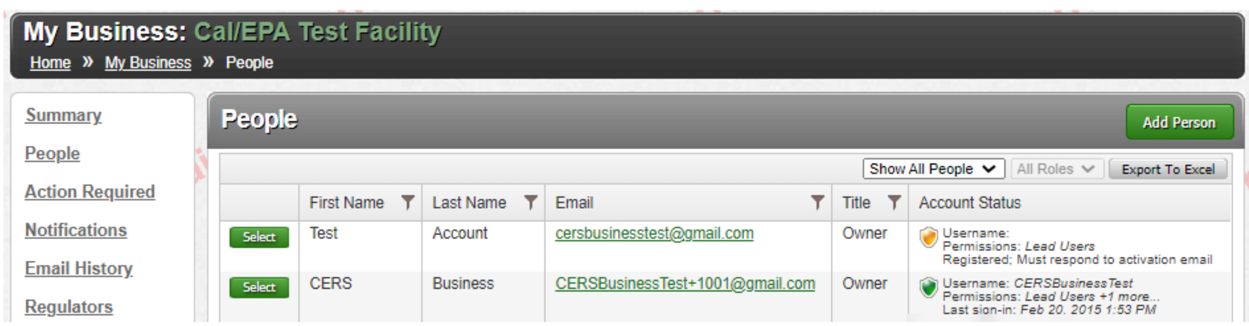
1. **To access the CERS Business Portal:**
   - Open your web browser and navigate to the **CERS Central** Home page: **https://cers.calepa.ca.gov**
   - Select the **Business Portal Sign In** (green) button from the CERS Central Home page.
   - Enter your **Username**.
   - Select **Next**.
   - Enter your **Password**.
   - Select **Next**.
2. **After signing in to the CERS Business Portal:**
   - If your account has Permissions to multiple organizations (businesses) in CERS, you will be taken to the **Select Your Business** page.
   - Use the green **Select** button next to the Business Name to select an organization.

3. Below the **Common Tasks** section of the CERS Business Home page, select **People/Users**:

Please Note: moving your cursor over the **My Business** button on the menu bar and selecting **Manage People** will also take you to the **People** page.



4. The **People** page will allow you to manage (**add**, **delete**, or **modify** permissions) for persons associated with the organization.



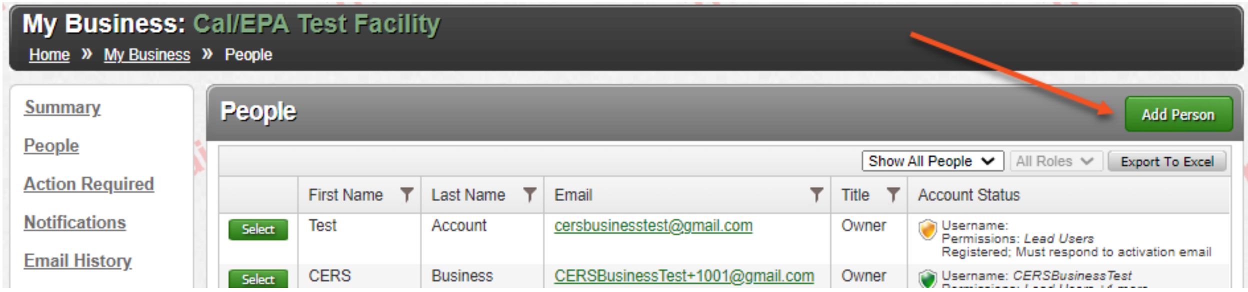
To ADD Permissions for a new business user CONTINUE TO PAGE 3

To DELETE Permissions for an existing business user CONTINUE TO PAGE 6

To MODIFY Permissions for an existing business user CONTINUE TO PAGE 8

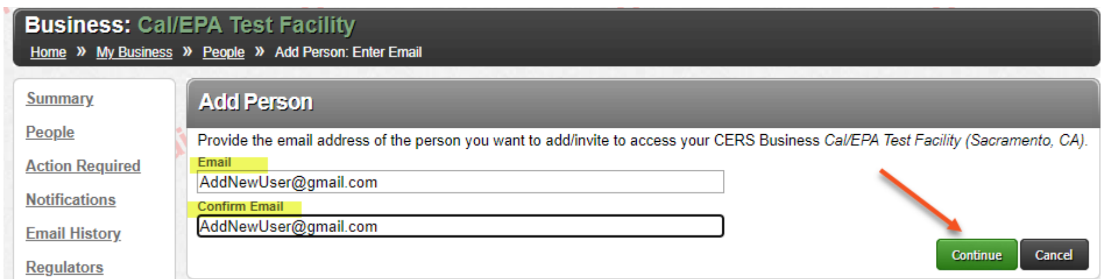
How To: Add Permissions for a New Business User:

1. To **add a new person to your Organization/business**, select the (green) **Add Person** button.



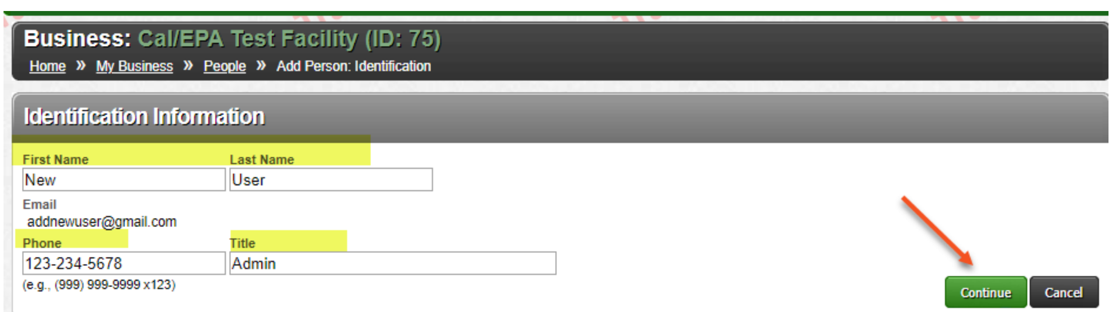
2. At the **Add Person** page, enter and confirm the email address of the person you want to add/invite to access your CERS Business.

   - Then select the (green) **Continue** button.



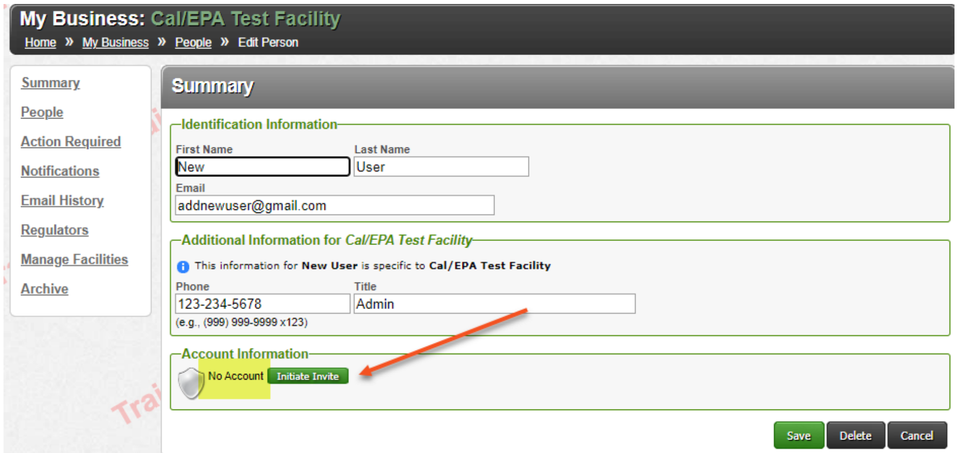
   - At the **Identification Information** page, enter the **First Name**, **Last Name**, **Phone Number** and **Title** of the new user.

   - Then select the (green) **Continue** button.

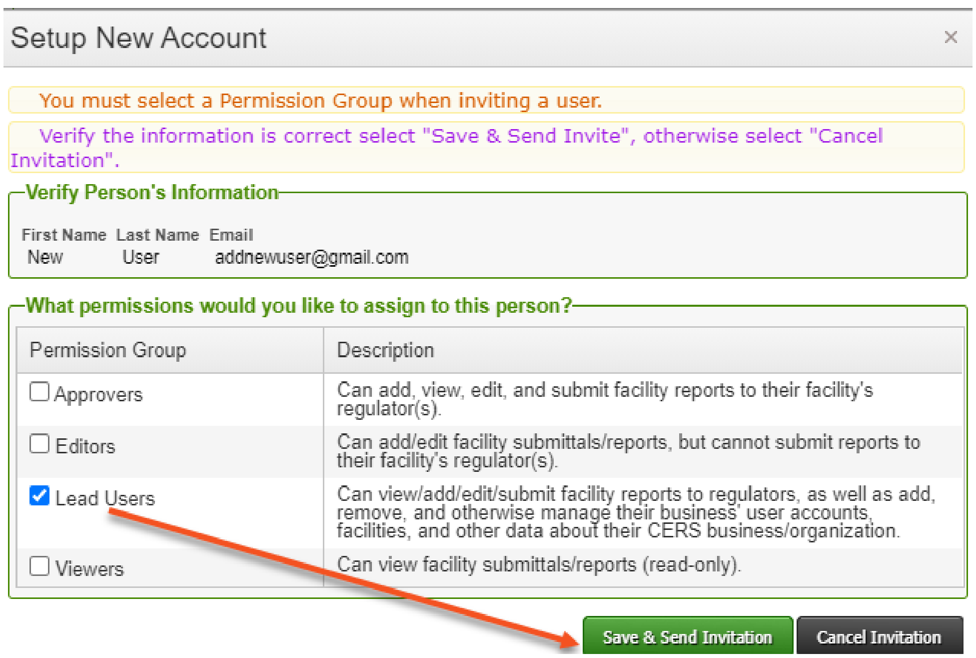


   - At the **Summary** page, if no account is associated with the email address provided, the system will provide a link to **Initiate Invite**. This will send an account invitation to the user to create a CERS user account. Select the green **Initiate Invite** to begin the invitation process.

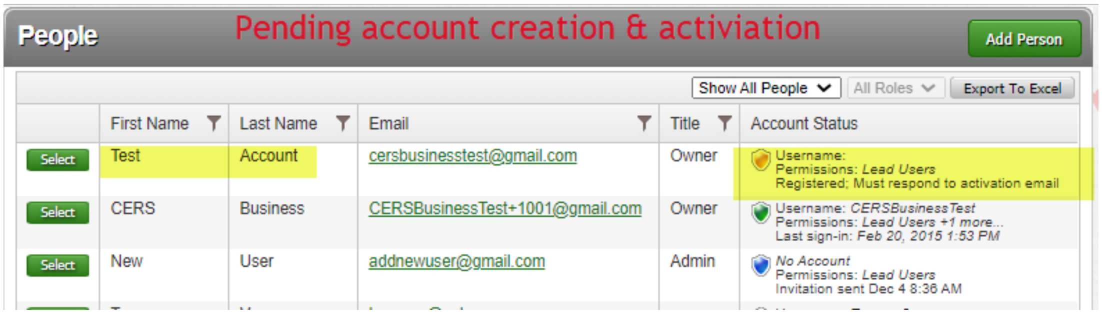
   - If this person already has an account established in CERS, no invitation to create account will be prompted, you will just need to set permissions.



- At the **Setup New Account** page, select a checkbox next to the **Permission level** that you would like to assign to this person.
    - Permission level (from lowest to highest): **Viewer**, **Editor**, **Approver**, **Lead User**.
- Select the (green) **Save and Send Invitation** button to complete the account invitation.



- After the new user opens the account invitation link that was emailed to them and creates their CERS user account, they will receive a second email from CERS to **activate the new account**.

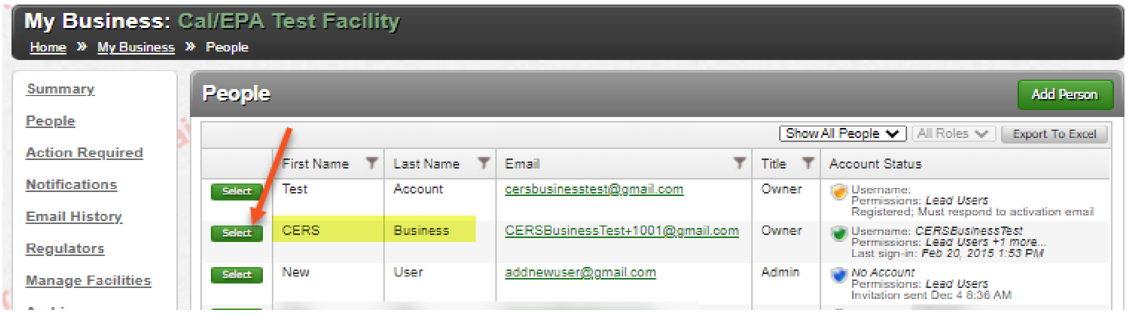


People
Pending account creation & activiation
Add Person
Show All People
All Roles
Export To Excel
First Name
Last Name
Email
Title
Account Status
Select
Test
Account
cersbusinesstest@gmail.com
Owner
Username:
Permissions: Lead Users
Registered; Must respond to activation email
Select
CERS
Business
CERSBusinessTest+1001@gmail.com
Owner
Username: CERSBusinessTest
Permissions: Lead Users +1 more...
Last sign-in: Feb 20, 2015 1:53 PM
Select
New
User
addnewuser@gmail.com
Admin
No Account
Permissions: Lead Users
Invitation sent Dec 4 8:36 AM

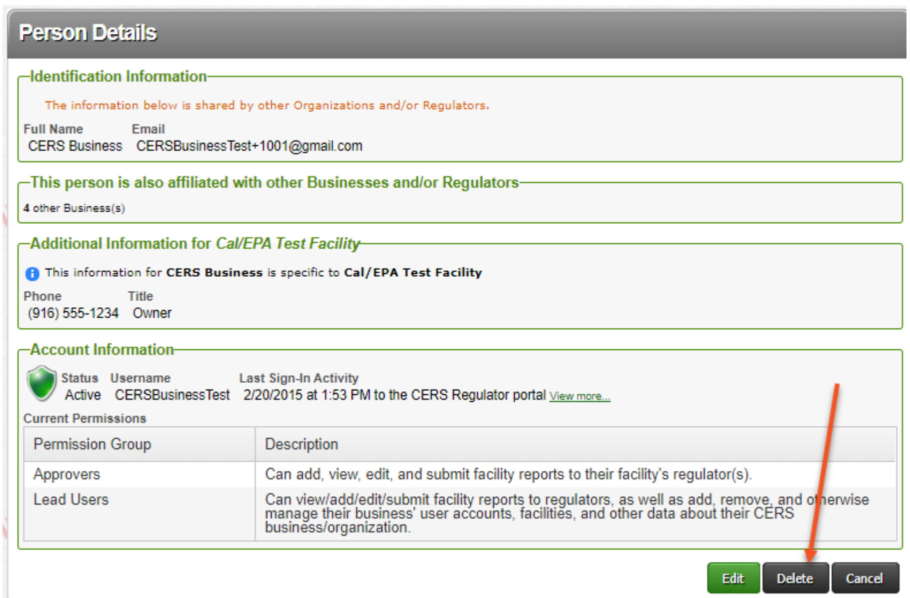
How To: Delete Permissions for an Existing Business User:

To **Delete** a person's permissions to the Organization/business:

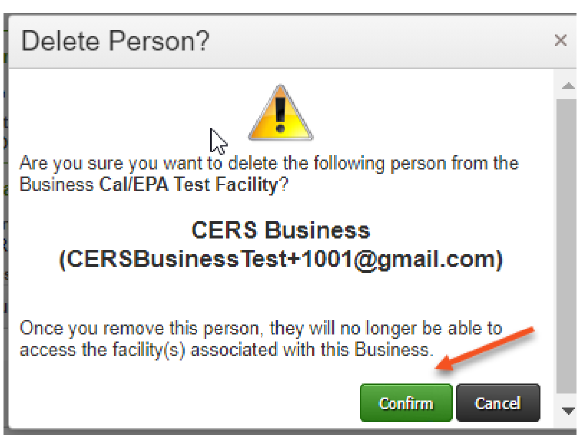
- Use the (green) **Select** button next to the name of the person you would like to delete.



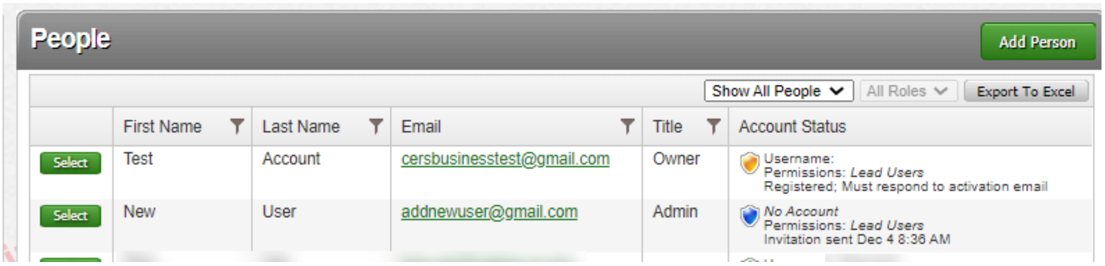
- From the **Person Details** page, select the (grey) **Delete** button.



- At the "**Delete Person?**" pop-up box: Select the (green) **Confirm** button.



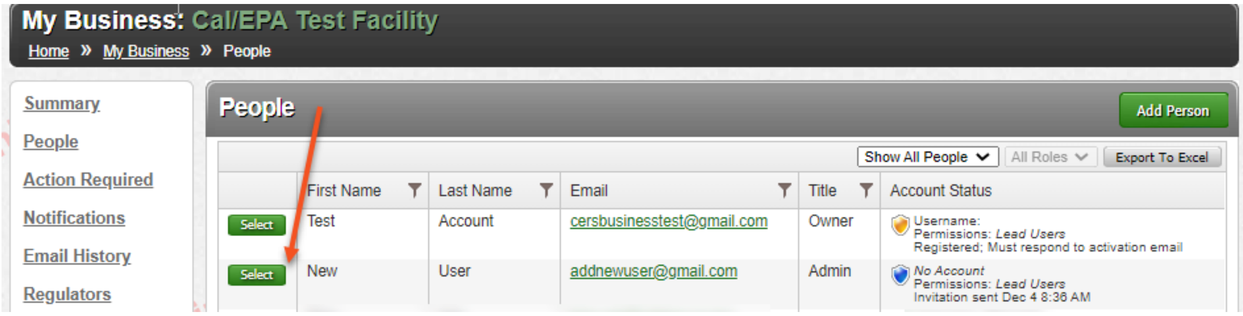
- The business user will no longer be listed on the **People** page for this Organization.



Please note: Deleting the user here will only remove that user's **permissions** from accessing this Organization/business. If the user has access to other organization(s), he/she will still be able to access them in the CERS Business portal.

How To: Modify Permissions for an Existing Business User:

To modify a person's permissions, click on the (green) **Select** button next to their name, at the **People** page.



- Select the (green) **Edit** button from the bottom of the **Person Details** page.

- At the **Summary** page, under the **Permission Group** section, **uncheck** the checkbox to remove that permission level *or* **check** a checkbox to select a new permission level.

- Select the (green) **Save** button to update the person's permissions to the Organization/business.