

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**.

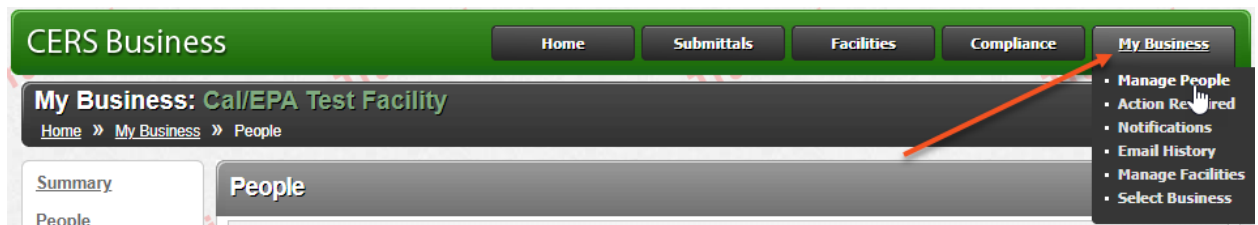
2. After signing in to the CERS Business Portal:

- 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.

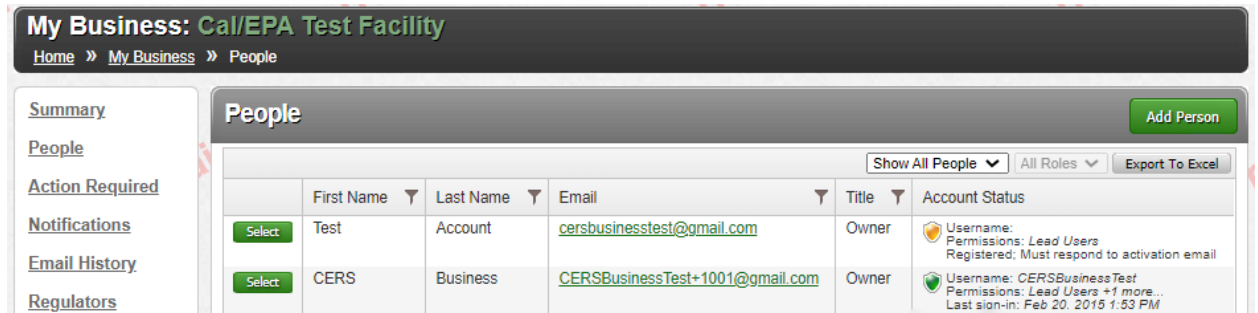
- Below the **Common Tasks** section of the CERS Business Home page, select **People/Users**:



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.



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



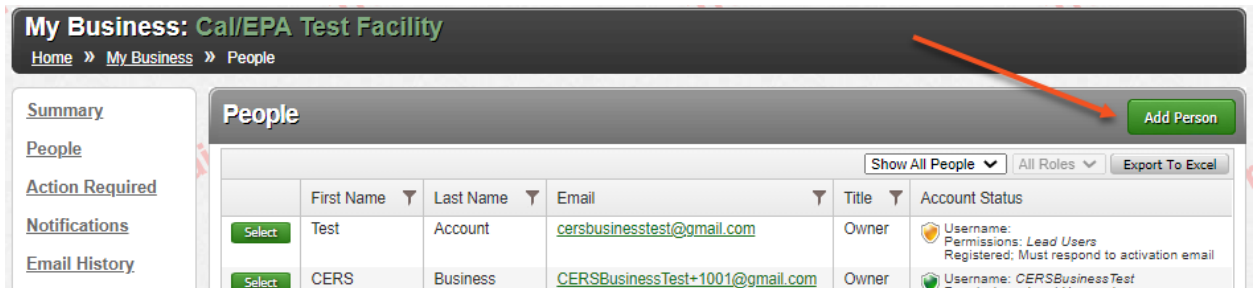
To **ADD Permissions** for a new business user **CONTINUE TO PAGE 3**

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.

Business: Cal/EPA Test Facility
Home > My Business > People > Add Person: Enter Email

Add Person

Provide the email address of the person you want to add/invite to access your CERS Business Cal/EPA Test Facility (Sacramento, CA).

Email
AddNewUser@gmail.com

Confirm Email
AddNewUser@gmail.com

Continue Cancel

- 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.

Business: Cal/EPA Test Facility (ID: 75)
Home > My Business > People > Add Person: Identification

Identification Information

First Name
New

Last Name
User

Email
addnewuser@gmail.com

Phone
123-234-5678
(e.g., (999) 999-9999 x123)

Title
Admin

Continue Cancel

- 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.

My Business: Cal/EPA Test Facility
 Home » My Business » People » Edit Person

Summary

Identification Information

First Name: Last Name:
 Email:

Additional Information for Cal/EPA Test Facility

This information for New User is specific to Cal/EPA Test Facility

Phone: Title:
 (e.g., (999) 999-9999 x123)

Account Information

No Account Initiate Invite

- 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.

Setup New Account [Close]

You must select a Permission Group when inviting a user.

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




Verify Person's Information

First Name: New Last Name: User Email: addnewuser@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 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).

- 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 & activation					
	First Name	Last Name	Email	Title	Account Status
Select	Test	Account	cersbusinessstest@gmail.com	Owner	 Username: <i>Lead Users</i> Registered; Must respond to activation email
Select	CERS	Business	CERSBusinessTest+1001@gmail.com	Owner	 Username: <i>CERSBusinessTest</i> Permissions: <i>Lead Users +1 more...</i> Last sign-in: <i>Feb 20, 2015 1:53 PM</i>
Select	New	User	addnewuser@gmail.com	Admin	 No Account Permissions: <i>Lead Users</i> Invitation sent Dec 4 8:38 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.

My Business: Cal/EPA Test Facility
Home » My Business » People

Summary
People
Action Required
Notifications
Email History
Regulators
Manage Facilities

People [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: 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

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

Person Details

Identification Information
The information below is shared by other Organizations and/or Regulators.
Full Name: CERS Business | Email: CERSBusinessTest+1001@gmail.com

This person is also affiliated with other Businesses and/or Regulators
4 other Business(s)

Additional Information for Cal/EPA Test Facility
This information for CERS Business is specific to Cal/EPA Test Facility
Phone: (916) 555-1234 | Title: Owner

Account Information
Status: Active | Username: CERSBusinessTest | Last Sign-In Activity: 2/20/2015 at 1:53 PM to the CERS Regulator portal [View more...](#)

Current Permissions

Permission Group	Description
Approvers	Can add, view, edit, and submit facility reports to their facility's regulator(s).
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.

Edit Delete Cancel

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

Delete Person?

Are you sure you want to delete the following person from the Business Cal/EPA Test Facility?

CERS Business
(CERSBusinessTest+1001@gmail.com)

Once you remove this person, they will no longer be able to access the facility(s) associated with this Business.

Confirm Cancel

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

	First Name	Last Name	Email	Title	Account Status
Select	Test	Account	cersbusinesstest@gmail.com	Owner	Username: Lead Users Registered; Must respond to activation email
Select	New	User	addnewuser@gmail.com	Admin	No Account Permissions: Lead Users Invitation sent Dec 4 8:36 AM

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.

	First Name	Last Name	Email	Title	Account Status
Select	Test	Account	cersbusinessstest@gmail.com	Owner	Username: Lead Users Registered; Must respond to activation email
Select	New	User	addnewuser@gmail.com	Admin	No Account Permissions: Lead Users Invitation sent Dec 4 8:36 AM

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

Person Details

Identification Information

Full Name	Email
New User	addnewuser@gmail.com

Additional Information for Cal/EPA Test Facility

i This information for **New User** is specific to **Cal/EPA Test Facility**

Phone	Title
(23) 234-5678	Admin

Account Information

i An invitation was sent on December 4, 2020.

Assigned Permissions

Permission Group	Description
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.

Edit Delete Cancel

- 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.

Summary

Identification Information

First Name New	Last Name User
Email addnewuser@gmail.com	

Additional Information for Cal/EPA Test Facility

ⓘ This information for **New User** is specific to **Cal/EPA Test Facility**

Phone 123-234-5678 <small>(e.g., (999) 999-9999 x123)</small>	Title Admin
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Account Information

ⓘ An invitation was sent on December 4, 2020.

Resend Invitation

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).