

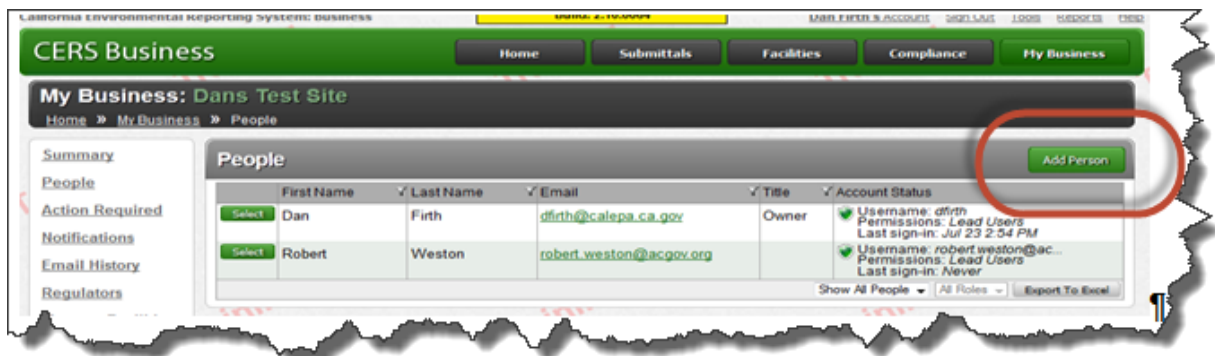
Adding a New User (Businesses with Two or More Facilities)

It is easy to authorize someone to have access to your facilities in CERS. This brief document shows how to add a new person/user to your CERS business who does not already have a CERS Account. This process sends an automated emailed invitation for the potential user to get a CERS User Access Account. Once added, the new user will have access to **ALL** facilities within your CERS business/organization. The first few steps are the same for new and existing CERS users.

- 1) Start from your home page and select "People/Users" from your Common Tasks section or click on the "Manage People" link under the "My Business" button at the top of your home page.



- 2) A screen will display all of the users currently associated with your facility. To add another user, select the "Add Person" button on the right side of the screen



- 3) A new screen prompts you to input the email address of the person you wish to add. Enter the email account in both fields then select the “Continue” button.

The screenshot shows the 'Add Person' screen in the CERS Business system. The page title is 'Business: Dans Test Site'. The breadcrumb trail is 'Home » My Business » People » Add Person: Enter Email'. On the left, there is a sidebar with links: Summary, People, Action Required, Notifications, Email History, Regulators, Manage Facilities, and Archive. The main content area is titled 'Add Person' and contains the instruction: 'Provide the email address of the person you want to add to the Business Dans Test Site.' Below this are two input fields labeled 'Email' and 'Confirm Email'. A red arrow points to the 'Email' field. At the bottom right, there are two buttons: 'Continue' (highlighted with a red circle) and 'Cancel'. The footer contains links for 'Diagnosis', 'Conditions of Use', 'Privacy Policy', and 'Contact'.

- 4) CERS will check to see if a CERS Account has already been exists for that email address. If not, you will be prompted to provide the person’s first and last name, phone number, and job title. Fill in the fields and select the “Continue” button.

The screenshot shows the 'Identification Information' screen in the CERS Business system. The page title is 'Business: Dans Test Site (ID: 53)'. The breadcrumb trail is 'Home » My Business » People » Add Person: Identification'. The main content area is titled 'Identification Information' and contains several input fields: 'First Name', 'Last Name', 'Email' (with the value 'danf@gmail.com'), 'Phone' (with a note '(e.g., (999) 999-9999 x123)'), and 'Title'. Red arrows point to the 'First Name' and 'Last Name' fields. At the bottom right, there are two buttons: 'Continue' (highlighted with a red circle) and 'Cancel'. The footer contains links for 'Diagnosis', 'Conditions of Use', 'Privacy Policy', 'Contact', and 'Help'.

- 5) Select the desired user permission level you wish this person to have and click on the 'Save' button. Note also that this is the same screen where you can delete a user.

Summary

Identification Information

First Name: Test, Last Name: Person, Email: testperson@gmail.com

Additional Information for Dans Test Site

This information for Test Person is specific to Dans Test Site

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

Account Information

An invitation was sent on June 7, 2012.
 Resend Invitation

Permission Group	Description
<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).
<input type="checkbox"/> Editors	Can add/edit facility submittals/reports, but cannot submit reports to their facility's regulator(s).
<input type="checkbox"/> Approvers	Can add, view, edit, and submit facility reports to their facility's regulator(s).

Buttons: Save, Delete, Cancel

- 6) CERS will send an automated email invitation to the user. The email contains instructions for them to follow to activate their new CERS Account. Once activated they will be added as a user to your business. If they do not activate their CERS Account within 30 days, the account invitation expires and you would need to resend the invitation.

In the following screen you can see *Test Person* has been added as a person/user for your business, but they can't access CERS until they activate their account as instructed in the account invitation email they received. Once they activate their account their status will change automatically.

My Business: Dans Test Site

Home » My Business » People

People Add Person

	First Name	Last Name	Email	Title	Account Status
Select	Chris	Allen	callen@calepa.ca.gov		Username: callen Permissions: Lead Users Last sign-in: Jul 20 1:15 PM
Select	Dan	Firth	dfirth@calepa.ca.gov	Owner	Username: dfirth Permissions: Lead Users Last sign-in: Jul 23 2:04 PM
Select	Test	Person	testperson@gmail.com		No Account Invite
Select	Robert	Weston	robert.weston@enc.ca.gov		Username: robert.weston@gac... Permissions: Lead Users Last sign-in: Never

Show All People | All Roles | Export To Excel

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