

Responsibilities of Lead Users

Lead users are responsible for managing all access requests and user accounts for any facility included in their business/organization in CERS. As soon as a business has a designated lead user, all future access requests for that business in CERS will go to the lead user(s) for that business rather than to the CUPA (or to Cal/EPA in the case of multijurisdictional businesses). Lead users are also responsible for deleting users that should no longer have access and assigning new users to the proper permission group. *Permission groups are assigned at the business/ organization level. This means that if Facility X and Facility Y are grouped together into the same business/ organization, giving someone certain rights such as the ability to edit and submit reports for Facility X automatically gives them the same rights to edit and submit reports for Facility Y. Also note that every lead user has the same authority as every other lead user. In other words, any lead user can make any other person a lead user with authority equal to their own, and could also delete all other users if they so desired.* The permission groups are as follows:

Approver – Can add, view, edit, and submit facility reports to their facility's regulator(s).

Editor - Can add/edit facility submittals/reports, but cannot submit 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.

Viewers - Can view facility submittals/reports (read-only).

We recommend that every business have at a minimum two lead users, and that at least one lead user be an employee of the business rather than a consultant. Various other permission levels can be granted to additional staff as needed.

Additional users can be added by lead users either directly by using the People/Users link in CERS, or by responding to an email that is automatically generated by a person first locating the facility in CERS and requesting access.

Procedure to add users directly

1. Log in to your business CERS account.
2. Click on People/Users (pink box)
3. Click on green Add Person button (on the right)
4. Enter the email address of the person you want to have access in the email box; re-enter the email address in the confirm email box. Then click Continue.
5. You will get a message as to whether the person (i.e., the email address) is already known to CERS.
 - a. If yes, click Continue.
 - b. If no, enter the first and last name of the person, and include additional information (phone and title) if desired. Click Continue. Then click the button Initiate Invite. An email will be automatically sent from CERS to the new user that contains a link to the CERS registration page. The registration process must be completed before the person can log in and gain access to the facility's record in CERS.
6. Choose the level of access the new person will have by clicking in the box in front of the desired permission group.
7. Click Save.

User locates facility and requests access through CERS:

A person desiring access to a facility record in CERS can register on the CERS site (if not already registered), log in to the Business Portal Sign In, and then search for the facility. After finding the correct facility the user can request access by entering any required information into the request form and clicking Submit, which will generate an automatic email from CERS to the lead user(s) of the business/ organization that the facility is associated with. The email includes a link that the lead user clicks on in order to select a permission level and grant access.