

Evident.

I-REC Registry User Guide

UG-03: Registrant

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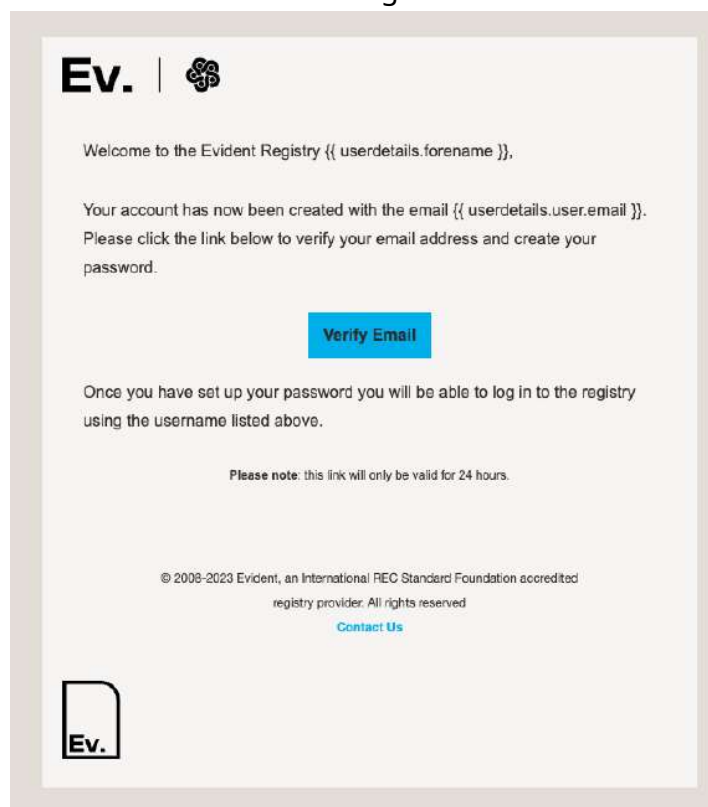
1 Becoming a Registrant

To become a Registrant and submit your renewable energy projects for registration, it is first necessary to have a contract with an Issuer. Issuers may provide services in one or more countries.

Due diligence checks are performed to satisfy Know Your Customer and Anti Money Laundering regulations as part of the process of providing access to the Registry. This process can take an extended period and you may be required to provide documentation to support your application.

Your organisation will be added to the Registry and an initial user will be created for you only when you have appointed an Issuer and satisfied the due diligence requirements. Please watch out for an automated email containing an authentication link which you will need to activate in order to access the Registry. Should the link have expired, please contact the I-REC Helpdesk at: helpdesk@evident.global.

The activation email will look similar to the image below:



Please note that email systems can change how emails are displayed.




2 Access to the Registry

2.1 Login to the Registry

The Registry can be accessed at <https://evident.app>.

Please login to the Registry using your email address and password.

Ev. | 

Email

Password

[Login](#)

[Forgotten your password?](#)

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[Privacy Notice](#)

If you have forgotten your access details or password, please use the 'Forgotten your password?' link on this page.



3 Registering a Production Device

3.1 Introduction

A Production Device or Production Device Group (collectively a “Device”) must be registered in order for I-REC certificates to be issued for it.

Please note that in the Evident Registry and related documentation, Facility and Device are interchangeable terms.

The Device registration process is a multi-step process involving both a Registrant and an Issuer. Registrants must create and submit a Device registration to an Issuer for verification. The Issuer may approve or reject the request.

3.2 Pre-requisites

Each Issuer or country may have a different set of documentation required to support a Device registration. If you are still unsure after following the guidance on the Device Registration page in the Evident Registry, please check with your Issuer to determine what information and supporting documents they need and have that documentation ready to upload into the Registry.

3.3 Device Groups

Please consult with your Issuer before registration of a Production Device Group, as there may be specific guidance that needs to be followed.



3.4 Process Overview

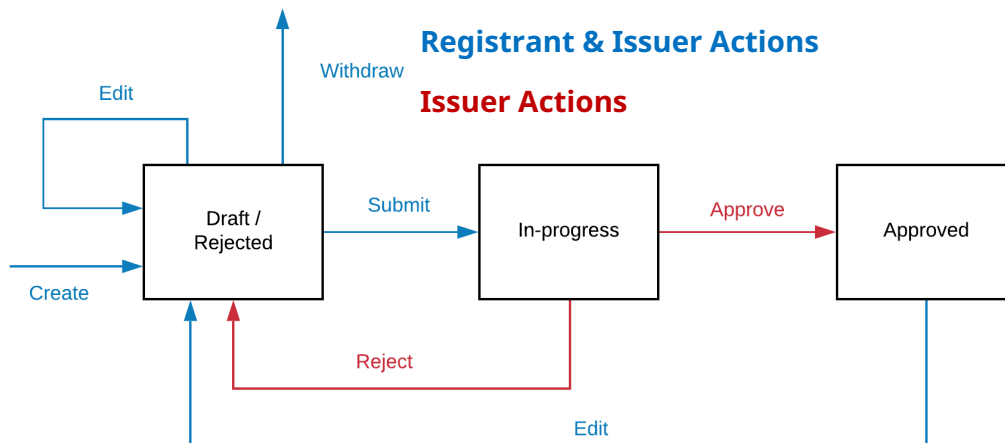


Figure 1 Production Device Registration Process

A Device registration is initiated by a Registrant. When the initial Device registration request is created, it will be assigned a status of *Draft*.

Three options will now be available. The Registrant can **Edit** the Device registration request, **Withdraw** (delete) it, or **Submit** it to an Issuer for processing and approval.

Once a Registrant has submitted a Device registration request for approval, the Issuer may **Reject** it back to them, leaving a note explaining the reasoning behind the rejection. When a Device registration request has been rejected, the Registrant will need to amend it by editing, saving, and re-submitting it; alternatively, it can be withdrawn.

Once a Device registration request has been approved by the Issuer, the Device will be viewed by the Registry as being *Approved*. At this point, issue requests may be made against the Device and the Device will appear on the Registry's public Device register.

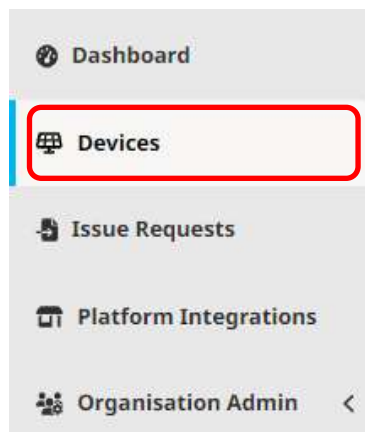
Changes required after a Device has been approved can be proposed by editing the Device. Doing so will cause the Device to revert to a *Draft* status (it is still possible to issue certificates from this Device based on the previous *Approved* version) – after which the Registrant will need to **re-Submit** the Device.



3.5 Create a Production Device

3.5.1 Navigate to Devices

On the left-hand navigation column, click **Devices**.



3.5.2 Click on “Create New Device”

In the top-right hand corner, click the **Create New Device** button.

+ Create New Device

3.5.3 Enter Device Details

Enter the general information relating to the Device.

Device Name *
Enter the name of the device.

Test Device ✓

Default account code
If you are planning to deposit issue requests into a trade account owned by your organisation, you can enter the default account to deposit them into. (This can be overwritten when making an issue request). If you are planning to deposit issue requests into another organisation's account, please leave this value blank.

TQC9QB80 ✓

Issuer Organisation *
Select the issuer you wish to issue certificates for this device.

The Green Certificate Company (Central Issuer) x v

The following table describes the data fields on this form:

Field	Description
Device Name	The name of the Device, for example “Sheffield Wind Farm”.



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	<p>The device name must be consistent with any name used elsewhere, such as registration with a network operator or in planning documents.</p> <p>This field must be longer than 4 characters.</p>
Default Account Code	<p>This field is optional.</p> <p>If you also have Participant permissions and would like to set a default account for where certificates issued from this Device are to be deposited, please select the account from the drop-down here.</p> <p>If you do not have Participant permissions, or do not wish to set this, you may leave it blank.</p> <p>Please note, when creating an issue request this value can be changed.</p>
Issuer Code	<p>Please select from the dropdown menu the Issuer who will be processing this Device registration, as well as all Issue Requests made from this Device.</p>

Once the information has been entered, click **Next** to view the next page.

3.5.4 Enter Technical Information

Enter the technical information relating to the Device.



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Device Fuel *

Select the fuel type used by this device.

ES200 - Wind

**Device Technology ***

Select the specific technology the device uses.

TC210 - Onshore

**Capacity ***

Enter the device's capacity in megawatts (MW).

1.000000

MW

Commissioning Date *

Select the date the device was commissioned. This date must be in the past.

☐ Thursday 22 August 2024

Requested Effective Registration Date *

Select the date you wish this device registration to be effective from. This date must be in the past and after the commissioning date.

☐ Thursday 22 August 2024

This date must align with both the date you have filled on the registration form (SF-02) and the dates listed on the SF-02C.

This date is restricted by the Residual Mix Deadline (RMD), which limits the earliest possible date of registration in line with issuance deadlines.

More information on the RMD can be found here <https://www.trackingstandard.org/conclusions-of-the-rolling-rmd-consultation/>

Other Labelling Scheme

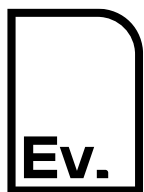
If this device qualifies for another labelling scheme, please specify which scheme here.



More information on labelling schemes is provided in the SD-03 Labelling Schemes, available from the Evident website, at <https://evident.global/documents>

The following table describes the data fields on this form:

Field	Description
Device Fuel	Please choose from the dropdown menu the primary fuel used by this Device. This can be changed when issuing certificates from this Device.



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Field	Description
Device Technology	Please enter the technology type used by this Device from the dropdown menu.
Capacity	<p>Please enter the Device's maximum capacity in MW. Any sub-MW capacity can be recorded as well using six decimal places to allow recording capacity to the Wh level. Capacity will be recorded as:</p> <ul style="list-style-type: none">○ '1.000000' = 1MW○ '0.001000' = 1kW○ '0.000001' = 1W
Commissioning Date	Please enter the date on which the Device was first commissioned.
Requested Effective Registration Date	Please enter the date on which the Device was registered.
Other Labelling Scheme	<p>This field is optional.</p> <p>If the Device also qualifies for another labelling scheme, please enter it here.</p>

Once the information has been entered, click **Next** to view the next page or **Previous** to go back one step.

3.5.5 Enter Location Information

Enter the location information relating to the Device.



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Address *

Enter the address for the device. This should correspond to the physical location of the device. It should not be the address of the device owner, unless that is the same address as the device.

Test Street

State/Province

Enter the state/province for the device. This should correspond to the physical location of the device. It should not be the state/province of the device owner, unless that is the same address as the device.

Postcode

Enter the postcode for the device. This should correspond to the physical location of the device. It should not be the postcode of the device owner, unless that is the same address as the device.

Country *

Select the country where the device is located.

GB - United Kingdom of Great Britain and Northern Ireland

For the most up to date country specific guidance, please refer to the SD-01: Authorised Issuing Regions document available at: <https://evident.global/documents>

Latitude and Longitude *

Enter the latitude and longitude of the device in decimal format. Alternatively, drag the pointer on the map to the device's location.

Latitude *

52.440541

Longitude *

-0.724122



The following table describes the data fields on this form:

Field	Description
Address	Enter the address for the Device you wish to register.
State/Province	Enter the state/province for the Device you wish to register.
Postcode	Enter the postcode for the Device you wish to register.



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Field	Description
Country code	Enter the country for the Device you wish to register.
Latitude/Longitude	Either manually enter the latitude and longitude for the Device, or you can use the map widget to drag-and-drop the pin over the Device location to update the latitude/longitude.

Once the information has been entered, click **Next** to view the next page or **Previous** to go back one step.

3.5.6 Enter Supporting Information

This page differs depending on which Issuer the Device is being registered with. For all Issuers, if the Device already has files uploaded, the page will display as follows:

Device Files

Test.png
2024-09-04 12:25:32

[Download All](#)
[Download](#) [Archive](#)

Please upload all supporting information relating to the device here. All information provided here will be reviewed by your issuer before the device is approved. Please contact your issuer to determine what information needs to be uploaded. ⓘ

Drop files here or click to upload.

You can upload supporting documents after submitting this form.

Notes

Additional notes / information related to this device. These notes will be visible to your issuer.

If you are creating a new Device without any uploaded files and have selected The Green Certificate Company (GCC) as the Issuer, the page will display as follows:



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i Document Uploads

A minimum of 5 document uploads are required to submit your facility. You can save your progress if you do not have all these files available.

Each upload section outlines important requirements for the document to be considered valid for the Evident Registry. The checkboxes will help to guide you through the requirements for each document and must be completed to be able to upload files.

If you require any help with the document uploads, please save your progress, and email the GCC team at helpdesk@gcc.re.

↓ Form SF-02 - Production Facility Registration *

Required

There are currently no files associated with this.

Please provide a completed copy of the form SF-02. A checklist for key elements is provided below.

☐ The SF-02 has been fully completed, signed, and dated.
☐ The official name of the facility used on form SF-02 matches the name provided on the Registry and other supporting documents.
☐ The capacity (in MW) matches the installed Alternating Current (AC) capacity shown on the Single Line Diagram (SLD) and supporting documents.
☐ The effective date of registration matches the date inputted on the Registry in Step 2. It must not be before the effective date of registration set out by the Residual Mix Deadline.
☐ The number of generating units (generators) is provided and matches the amount in the supporting SLD.
☐ The serial numbers of the facility's meters are provided.

Upload Files ●

Review and tick all requirements above to enable the file uploader.

→ SF-02C Owner's Declaration or Proof of Ownership *

Complete

→ Motoring Evidence *

Required

→ Single Line Diagram *

Required

→ Project Photos *

Required


→ Additional documents and notes

Optional

The categorised file upload requires you to upload the five required documents for Device registration with GCC. Click each category to expand it and to view its checklist. The checklists provide you with further guidance on the requirements for documents in each category and must be ticked before the file uploader is enabled. Once you have ticked each item, the file upload section will become available and the message will change to "Drop files here or click to upload.", as can be seen below.




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Upload Files 

Drop files here or click to upload.

If you are creating a new device with an Issuer other than GCC, the page will display as follows:


 **Document Uploads**

For the best chance of approval, there are 5 recommended documents to upload for your facility registration.

If you require any help with the document uploads, please save your progress, and contact your Local Issuer.

↓ **Form SF-02 - Production Facility Registration** **Recommended**

There are currently no files associated with this.

Upload Files 

Drop files here or click to upload.

→ **SF-02C Owner's Declaration or Proof of Ownership** **Recommended**

→ **Metering Evidence** **Recommended**

→ **Single Line Diagram** **Recommended**

→ **Project Photos** **Recommended**

→ **Additional documents and notes** **Optional**

The Issuer may, as part of the Device registration process, require additional documents for their review. If you are unsure, please check with your Issuer beforehand to determine what information and supporting documents they require to process a Device registration and have that documentation ready to be uploaded into the Registry.

Use the "Upload Files" section to attach all the files/documents required by your Issuer. A description will be requested for each file.



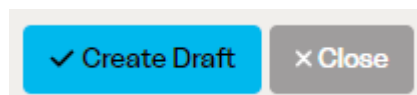
Should you have any notes or comments for the Issuer to review, these can be added to the "Notes" section.

All notes and uploaded documents will be visible to your Issuer only.

3.5.7 Create Draft and Save

Once all the information supplied is complete and correct, you can save the Device registration. There are two options to choose from:

- **Create Draft** - This will save your progress and return you to the main Device Management page.
- **Close** - Cancel and close the form, any changes will be lost.



Alternatively, you may click **Previous** to go back one step.

3.6 Submit a Production Device

A Device may be edited at any point prior to submission. Once submitted, it will be locked until the Issuer has either approved or rejected the registration.

3.6.1 Submit for Approval



After a Device has been created as *Draft*, it will become available to be submitted to the Issuer for review, further editing, or withdrawal.

There are four options to choose from:

- **Save** – This will save your progress as *Draft* and return you to the main Device Management page.
- **Submit** – This will start the submission process.
- **Withdraw** – This will delete the current Device registration request, and cannot be undone.
- **Close** – Cancel and close the form, any changes will be lost.



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3.6.2 Confirmation

When you press **Submit**, a popup window will be displayed with a tick box requesting confirmation that the information is complete, and that all required files and documents have been uploaded.

Submit Device Registration

Warning: This device registration has no active files attached to it.

Are you sure you wish to submit this device registration?

☐ I confirm all the required information is completed and the necessary supporting information and files are attached.

X Close ✓ Yes, submit device

Note: If you have not attached any supporting documents to this Device registration request, you will receive a warning at this point.

There are two options to choose from:

- **Yes, submit device** – This will display a further confirmation window with the required legal declaration.
- **Close** – This will cancel the submission and return to the previous page.



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Legal Confirmation

Info: Please read the following legal confirmation carefully.

On behalf of Test Organisation, I agree to be subject to the I-REC Code and warrant that the information contained in this application is truthful and exhaustive.

Any planned changes concerning the information given in this form will be announced in advance to the I-REC Device Verifier and the Issuer.

Any unplanned changes will be reported to the I-REC Device Verifier and the Issuer at the first possible occasion.

The owner of the Production Device and the Registrant as his agent accept the possibility of unannounced control and auditing visits to their own premises and/or the premises of the Production Device, as prescribed in the Evident I-REC(E) Code.

A signed SF-02 Production Facility Registration form must be attached to this registration.

☐ I have read and agree to the terms as described above.

Close

Yes, submit device

There are two options to choose from:

- **Yes, submit device** – This will submit the Device to the selected Issuer for review.
- **Close** – This will cancel the submission and return to the previous page.

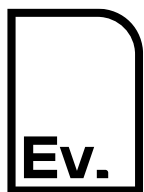
3.6.3 Pending Registrations

After a Device registration has been submitted, the status will be set to *In-progress* – this means that the Issuer has received the registration request. The review process may take an extended period.

Note: You may filter the statuses of Devices that appear in the Device Registrations table for ease.

Device ID	Name	Issuer	Country	Fuel Type	Installed Capacity	Status	Last Actioned	Actions
SHEFES10001	Sheffield Solar Park	issuerOrg	GB - United Kingdom of Great Britain and Northern Ireland	ES100 - Solar	12.000000 MWh	In Progress	3 seconds ago	

After reviewing the Device registration, the Issuer will either **Reject** the request or **Approve** the request.



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If the Issuer **Rejects** the request, they may either contact you directly with the reason why, or they can leave the reason as a note on the Device registration request. To view this note, you can click **Edit** on the Device, then view the Supporting Information, or you can place your cursor over the *Rejected* label to view the Device's notes, as shown below.

Device ID	Name	Issuer	Country	Fuel Type	Installed Capacity	Status	Last Actioned	Actions
SHEFES10002	Sheffield Solar Parks	issuerOrg	GB - United Kingdom of Great Britain and Northern Ireland	ES109 - Solar	12.000000 MWh	Rejected Incorrect SLD	16 seconds ago	

You may need to **Edit** the Device to make changes requested by the Issuer and **re-Submit** the Device.

If the Issuer **Approves** the Device registration request, the Device will become live on the Registry. You will then be able to create Issue Requests for this Device and it will appear on the public register.

3.7 Troubleshooting & FAQs

3.7.1 What supporting evidence do I need to upload?

Please check the Evident website to see if there is a guidance note published for the country your Device is located in. If you are unsure, please contact the Issuer directly to determine what specific supporting evidence is required. This can vary by country, Device technology, or other factors.

3.7.2 My Device submission was rejected, why is this and what do I do now?

If your Device registration was rejected, there will be a reason recorded. This is often due to missing documentation. Either your Issuer will have contacted you directly to alert you to the specific reason as to why it was rejected, or they will have left a note on the Device request itself (see section 3.6.3 for more information). Please contact your Issuer directly should you have any further questions regarding why a Device registration was rejected.





3.7.3 I have uploaded the wrong document to my Device registration by mistake.

If you have yet to submit the Device, you can **Edit** it and will be able to **Remove** (delete) files that have been uploaded to it, as shown below.



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Upload Files ⓘ

 projectphoto1.png 1.09 MB	Notes <input type="text"/>	 Remove
 projectphoto2.png 1.09 MB	Notes <input type="text"/>	 Remove

Drop files here or click here to upload.

However, if the Device has been submitted, you will need to ask your Issuer to **Reject** it so that you can remove the files.



4 Creating an Issue Request

4.1 Introduction

A Production Device or Production Device Group (collectively a “Device”) must be registered in order for I-REC certificates to be issued for it.

The Issuing process is a multi-step process involving both a Registrant and an Issuer. Registrants must create and submit an Issue Request to an Issuer for verification. The Issuer may approve or reject the request.

4.2 Pre-requisites

The Device to be associated with an Issue Request must be approved and active prior to creation of the Issue Request.

An Active Trade account must be specified.

All required supporting information, including a signed copy of the CSD04 Issue Request Form must be uploaded and attached to the Issue Request.

4.3 Process Overview

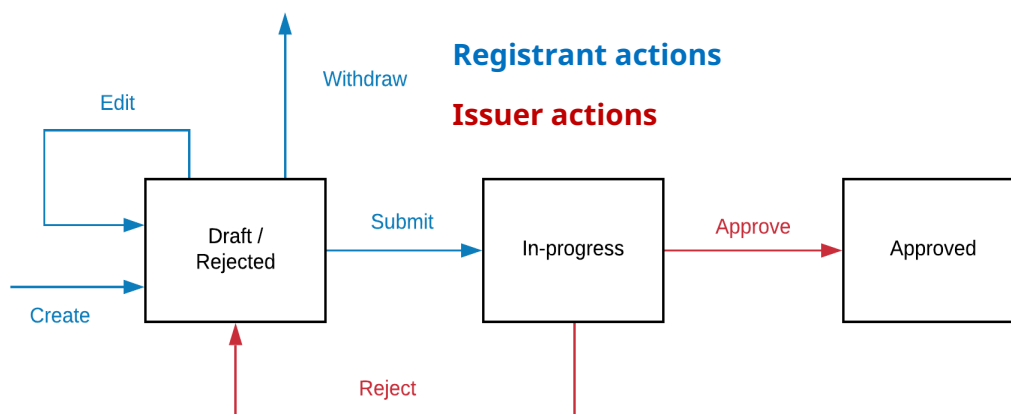


Figure 2 Issue Request Process

An Issue Request must be created and submitted by a Registrant. When the initial Issue Request is created, it will be assigned a status of *Draft*.



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Three options will now be available. The Registrant can **Edit** the Issue Request, **Withdraw** (delete) it, or **Submit** it to an Issuer for processing and approval.

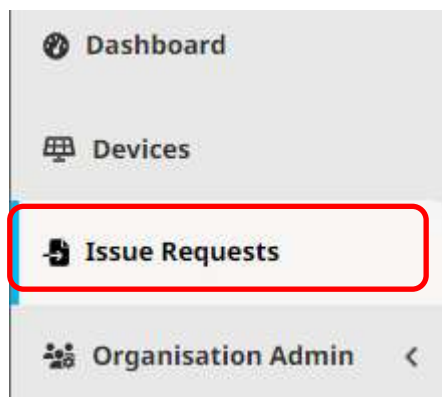
Once a Registrant has submitted an Issue Request for approval, the Issuer may **Reject** it back to them, leaving a note explaining the reasoning behind the rejection. When an Issue Request has been rejected the Registrant will need to amend it by editing, saving, and re-submitting it; alternatively, it can be withdrawn.

On approval of an Issue Request, the resulting certificates will be credited to the nominated Trade account and will be available to be transferred or redeemed.

4.4 Create an Issue Request

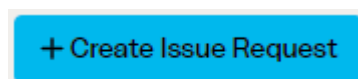
4.4.1 Navigate to Issue Requests

On the left-hand navigation column, click **Issue Requests**.



4.4.2 Click on “Create Issue Request”

In the top right-hand corner, click the **Create Issue Request** button.



4.4.3 Enter Issue Request Details and Create Draft

Enter the information relating to the issue request you wish to create.



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Create New Issue Request

✓ Create Draft × Close

Device Code *

Please choose... ▼

Recipient Account Code *

Trade account code

Fuel Code *

Please choose... ▼

Start Date *

No date selected

End Date *

No date selected

Period Production *

MWh

Notes

Upload Files ⓘ

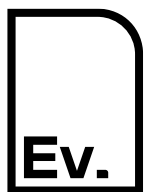
Drop files here or click here to upload.

Issue requests cannot be processed where the period overlaps another period for the same Device.

Once the Issue Request has been saved as a draft, it can be reviewed and updated prior to submission.

The following table describes the data fields on this form:

Data field	Description
Device code	The Device you wish to create the issue request on behalf of. This Device must have been Approved and Active.
Recipient account code	The depositing Trade account for which you wish to deposit the certificates into.
Fuel code	The fuel type used for this specific issue request.
Start date	The Start Date of production.
End date	The End Date of production.



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Data field	Description
Period production	The total amount of production generated. Any sub-MWh volume can be recorded using six decimal places to allow recording amounts to the Wh level. Amounts will be recorded as: <ul style="list-style-type: none">○ '1.000000' = 1MWh○ '0.001000' = 1kWh○ '0.000001' = 1Wh
Notes	Any additional notes or comments for the Issue Request. Where the volume of certificates required is less than the metered evidence for the period, please include a note of explanation.
Upload files	If your issuer requires any additional documentation for the issue request, please upload it here. If you are unsure, please contact your issuer directly to determine what information is required.

There are two options to choose from:

- **Create draft** – This will save your draft issue request.
- **Close** – Cancel and close the form, any changes will be lost.

Note: Issue Requests for a Device or Device Group shall not cover periods including days within more than one calendar month unless the data for the period covered is normally only available in periods that cross a month boundary.

It is best practice to submit Issue Requests based on the actual period of production. In cases where a Registrant is providing monthly production data, it is advised to issue certificates accordingly (i.e., on a monthly basis).

As an example, if data is provided in daily or monthly reports and the period covered is 1st June – 31st July, such a request is possible for a Registrant to submit as an Issue Request. However, following approval of the Issue Request by the Issuer, it will not be possible to split the issued certificates into two separate periods, one for June and one for July. Therefore, it is recommended to submit two separate Issue Requests for this case.



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4.5 Submit Issue Request

An Issue Request may be edited at any point prior to submission. Once submitted, it will be locked until the Issuer has either approved or rejected the request.

4.5.1 Submit for Approval

Click **Edit** on the relevant issue request.

Device	Recipient Account	Fuel Code	Start Date	End Date	Period Production	Last Actioned	Updated By	Status	Actions
TC210-test-dev-30 - TC210 test de...	TQHP4B5H	ES200 - Wind	2015-01-01 00:...	2015-09-30 01:...	34.000000 kWh	2 months ago	irecissueruser1@mail...	Draft	

The Issue Request can be modified, withdrawn, or submitted.



There are four options to choose from:

- **Save** – This will save your progress as *Draft* and return you to the main Issue Request page.
- **Submit** – This will start the submission process.
- **Withdraw** – This will delete the current Issue Request, and cannot be undone.
- **Close** – Cancel and close the form, any changes will be lost.

4.5.2 Confirmation

When you press **Submit**, a popup window will be displayed with a check box requesting confirmation that the information is complete, and that all required files and documents have been uploaded.

Submit Issue Request

Warning: This issue request has no active files attached to it.

Are you sure you wish to submit this issue request?

☐ I confirm all the required information is completed and the necessary supporting information and files are attached.

Close

Yes, submit request



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Note: If you have not attached any supporting documents to this Issue Request, you will receive a warning at this point.

There are two options to choose from:

- **Yes, submit request** – This will display the required legal declaration.
- **Close** – This will cancel the submission and return to the previous page.

Legal Confirmation

Info: Please read the following legal confirmation carefully.

In signing, the Registrant warrants that the energy for which I-REC certificates are being applied has not and will not be submitted for any other energy attribute tracking methodology.

The Registrant also warrants that, to the best of their knowledge, the consumption attributes contained within any I-REC certificate issued in association with this request (including all rights to the specific electricity and/or emissions for the reporting of any indirect carbon account purposes) are not delivered to any other body either directly or in-directly without the component I-REC certificate.

This includes but is not limited to electricity supply companies or the national governments.

☐ I have read and agree to the terms as described above.

Close

Yes, submit request

There are two options to choose from:

- **Yes, submit request** – This will submit the Issue Request to the Issuer for review.
- **Close** – This will cancel the submission and return to the previous page.

4.5.3 Pending Issue Requests

After an Issue Request has been submitted, the status will be set to *In-progress* – this means that the Issuer has received the issue request. The review process may take an extended period.

Device	Recipient Account	Fuel Code	Start Date	End Date	Period Production	Last Actioned	Updated By	Status	Actions
SHEFES10001 - Sheffield Solar Park	TX45T4ZW	ES100 - Solar	2023-01-01 00:00:00	2023-01-31 00:00:00	34,000,000 MWh	2 seconds ago	irecregistrantuser2...	In Progress	<div>RefreshView</div>

After reviewing the Issue Request, the Issuer will either **Reject** the request or **Approve** the request.



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If the Issuer **Rejects** the request, they may either contact you directly with the reason why, or they can leave the reason as a note on the Issue Request. To view this note, you can click **Edit** on the Issue Request or you can place your cursor over the *Rejected* label to view the Issue Request's notes, as shown below:

Device	Recipient Account	Fuel Code	Start Date	End Date	Period Production	Last Actioned	Updated By	Status	Actions
SHEFES10001 - Sheffield Solar Park	TX45T4ZW	ES100 - Solar	2023-02-01 00:00:00	2023-02-28 00:00:00	see...000000 kWh	7 minutes ago	irecissueruser2@m...	Rejected	Edit

You may need to **Edit** the Issue Request to make the changes required by your Issuer and **re-Submit** the request.

If the Issuer **Approves** the Issue Request, the resulting certificates will be credited to the nominated Trade account and will be available to be transferred or redeemed.



5 Platform Integrations

5.1 Introduction

Please note that the Platform Integrations functionality is currently under development for the Registrant role. In future, Registrants will be able to choose a Platform Operator to connect with, to perform Registrant actions via a Platform Operator's platform.

The list of Platform Operators and their platforms is expected to grow, with each platform operator offering different integration types for Registrants and Participants.

While Platform Integrations isn't available for use by Registrants just yet, it is currently available for Participants. If you are a Participant, you can learn more about Platform Integrations in the userguide *UG-02 Participant*.

We want to assure you that once development is complete, we'll be updating this section of the user guide.

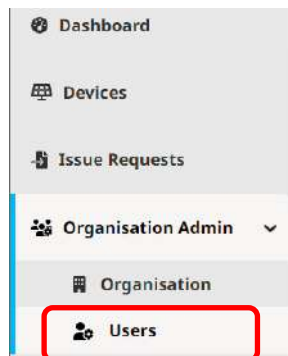


6 Managing Users

6.1 Create a New User

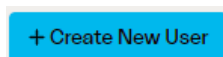
6.1.1 Navigate to User Management

On the left-hand navigation column, click **Organisation Admin** to open a drop-down menu, then click **Users**.



6.1.2 Select “Create New User”

Click the **Create New User** button in the top-right hand corner of the screen.



6.1.3 Enter User Details

Enter details for the user onto the form.

Note that a user must be marked as **Active** in order to access the Registry.



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The following table describes the data fields on this form:

Field	Description
Username	A 3-12 character, no spaces, uppercased code for the user. For example: "TOMSMITH", "SLJONES".
Title	The title of the user.
Forename	The forename of the user.
Surname	The surname of the user.
Telephone	A contact number for the user.
Email	The user's email address. This must be a valid email address so the newly created user can verify their account.
Active	Whether or not the user account should be active. Note that a user must be marked as Active in order to access the Registry.
Notes	Any additional notes or comments for the user record.

There are three options to choose from:

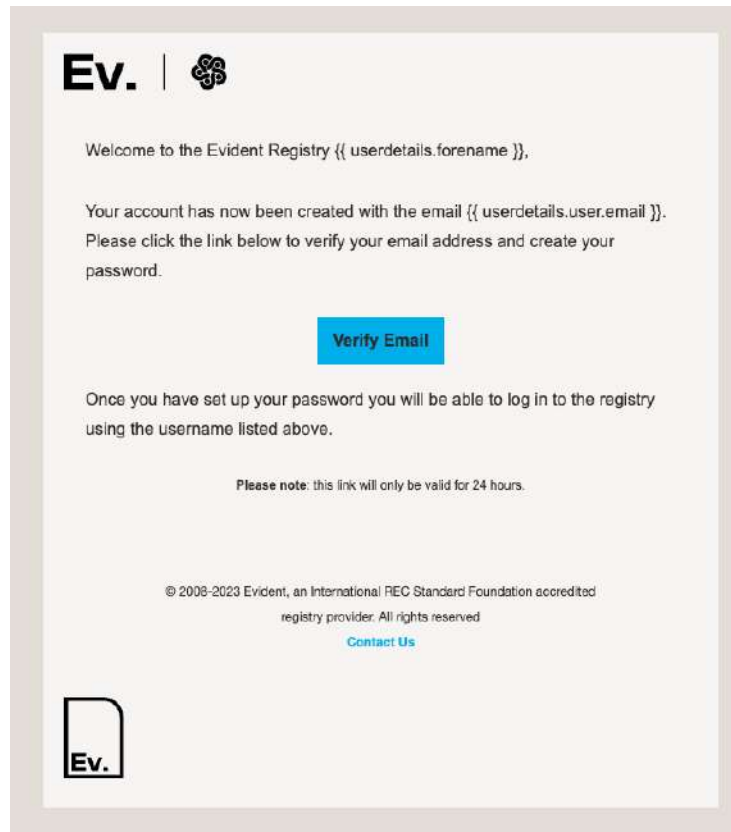
- **Save & configure Permissions** – This will save the user record and allow you to set their permissions manually (see section 6.2).
- **Save** – This will save the user record with default permissions.
- **Close** – Cancel and close the form, any changes will be lost.

The new user will receive an email asking them to verify their account by creating a password. New users will not be able to access the Registry until they have verified their account.



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6.2 Configure User Permissions

A default set of user permissions can be inherited from the new user's organisation on creation. For example, if the new user's organisation has the role of Registrant, they will automatically inherit the default permissions for Registrants so they can begin using the Registry as soon as they have verified their account. If the new user requires User and Organisation permissions, these can be requested.

If you need to change the permission for a user, you can edit the user's permissions at any time by clicking the **padlock** button for the user in the user list.





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On the Edit Permissions screen, you can choose which permissions to grant the user. Each permission's function is described next to it (see section 8 for further details). You can select or deselect a permission by clicking the box to the left of each option.

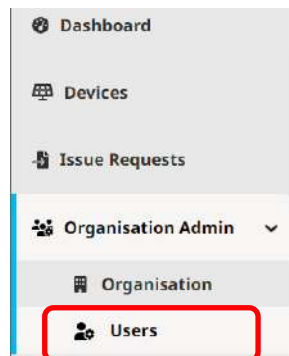
There are three options to choose from:

- **Reset permissions** – This will set the user's permissions for the default for their organisation.
- **Save** – This will save the user record with permissions set on the form.
- **Close** – Cancel and close the form, any changes will be lost.

6.3 Edit a User

6.3.1 Navigate to User Management

On the left-hand navigation column, click **Organisation Admin** to open a drop-down menu, then click **Users**.



6.3.2 Edit User Details

Click the **Edit** button for the user you want to edit.

Users within your organisation								
<input type="text" value="test"/>								
<input type="button" value="CSV"/>								
Username	Name	Email	Organisation	Telephone	Organisation Roles	Active	Actions	
TESTUSER12	Test User	testuser@evident.global	REGISTRANT_ORG_2 - regist...	1234	Registrant	Inactive		
Showing 1-1 of 1 rows								
Page Size 10 <input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/>								



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6.3.3 Update User Details

Update details as required.

The following table describes the data fields on this form:

Field	Description
Username	A 3-12 character, no spaces, uppercased code for the user. For example: "TOMSMITH", "SLJONES".
Title	The title of the user.
Forename	The forename of the user.
Surname	The surname of the user.
Telephone	A contact number for the user.
Email	The user's email address. This must be a valid email address so the newly created user can verify their account.
Active	Whether or not the user account should be active. An inactive user account cannot partake in regular activities within the Registry.
Notes	Any additional notes or comments for the account.

There are two options to choose from:

- **Save** – This will save the user record and close the form.
- **Close** – Cancel and close the form, any changes will be lost.



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6.4 Update User Permissions

A default set of user permissions is inherited from the new user's organisation on creation. For example, if the user's organisation has the role of Registrant, they will automatically inherit the default permissions for Registrants.

Username	Name	Email	Organisation	Telephone	Organisation Roles	Active	Actions
TESTUSER12	Test User	testuser@evident.global	REGISTRANT_ORG_2 - regist...	1234	Registrant	Inactive	Edit

Showing 1-1 of 1 rows

Page Size 10 First Prev 1 Next Last

To change the user's permissions, click the **padlock** button for the user in the user account list.

On the Edit Permissions screen, you can choose which permissions to grant the user. Each permission's function is described next to it (see section 8 for further details). You can select or deselect a permission by clicking the box to the left of each option.

Users within your organisation							
<input type="text" value="test"/>							
Username	Name	Email	Organisation	Telephone	Organisation Roles	Active	Actions
TESTUSER12	Test User	testuser@evident.global	REGISTRANT_ORG_2 - regist...	1234	Registrant	Inactive	Edit

Showing 1-1 of 1 rows

Page Size 10 First Prev 1 Next Last

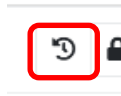
There are three options to choose from:

- **Reset permissions** – This will set the user's permissions for the default for their organisation.
- **Save** – This will save the user record with permissions set on the form.
- **Close** – Cancel and close the form, any changes will be lost.



7 Record History

A record of changes is maintained for records within the Registry. To view the record of changes, click on the View History button for the record. This is usually displayed next to the edit or view button in the list of records.





8 Permissions

8.1 Device

Permission	Description
Device Management GLOBAL	Grants permission for all below permissions.
Device Management CREATE	Grants user the ability to create Devices.
Device Management VIEW	Grants user the ability to view Devices.
Device Management EDIT	Grants user the ability to edit Devices.
Device Management HISTORY	Grants user the ability to view Device history page.
Device Management WITHDRAW	Grants user the ability to withdraw (delete) a Device registration request.
Device Management SUBMIT	Grants user the ability to submit a Device registration request for verification and approval.

8.2 Issue Request

Permission	Description
Issue Request GLOBAL	Grants permission for all below permissions.
Issue Request CREATE	Grants user the ability to create issue requests.
Issue Request VIEW	Grants user the ability to view issue requests.
Issue Request EDIT	Grants user the ability to edit issue requests.
Issue Request HISTORY	Grants user the ability to view issue requests history page.



Permission	Description
Issue Request WITHDRAW	Grants user the ability to withdraw (delete) an issue request.
Issue Request SUBMIT	Grants user the ability to submit an issue request to their issuer for verification and approval.

8.3 User

Permission	Description
User Management GLOBAL	Grants permission for all below permissions.
User Management CREATE	Grants user the ability to create a new user.
User Management EDIT	Grants user the ability to edit individual users.
User Management HISTORY	Grants user the ability to view changes made to users in their organisation.
User Management PERMISSIONS	Grants user the ability to change a user's permissions.

8.4 Organisation

Permission	Description
Organisation GLOBAL	Allow user to execute all available actions on organisations.
Organisation EDIT	Allows user to be able to edit own organisation.
Organisation VIEW	Allows user to view the organisation page.



8.5 Organisation Document

Permission	Description
Organisation Document CREATE	Allow user to be able to create individual organisation documents.
Organisation Document VIEW	Allow user to be able to view individual organisation documents.

8.6 File

Permission	Description
File GLOBAL	Allow user to execute all available actions on files
File ARCHIVE	Allow user to be able to archive files from the Registry
File DOWNLOAD	Allow user to be able to download files from the Registry
File REMOVE	Allow user to be able to remove files from the Registry
File UPLOAD	Allow user to be able to upload files into the Registry

8.7 Integration

Permission	Description
Integration GLOBAL	Allow user to execute all available actions on integrations and platforms
Integration CONNECT	Allow user to connect to an available integration
Integration DISCONNECT	Allow user to disconnect from an integration currently connected to their organisation



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Integration VIEW	Allow user to view all available platforms and integrations available to their organisation
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