RegData user guide

Adding a user

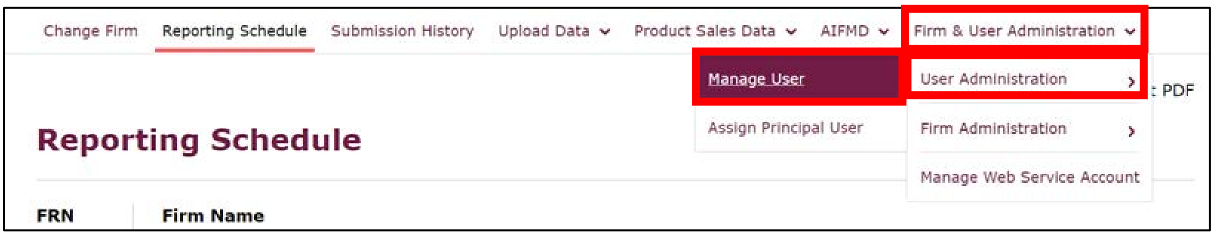
This user guide explains how to:

- add a user within RegData
- copy a user's permissions

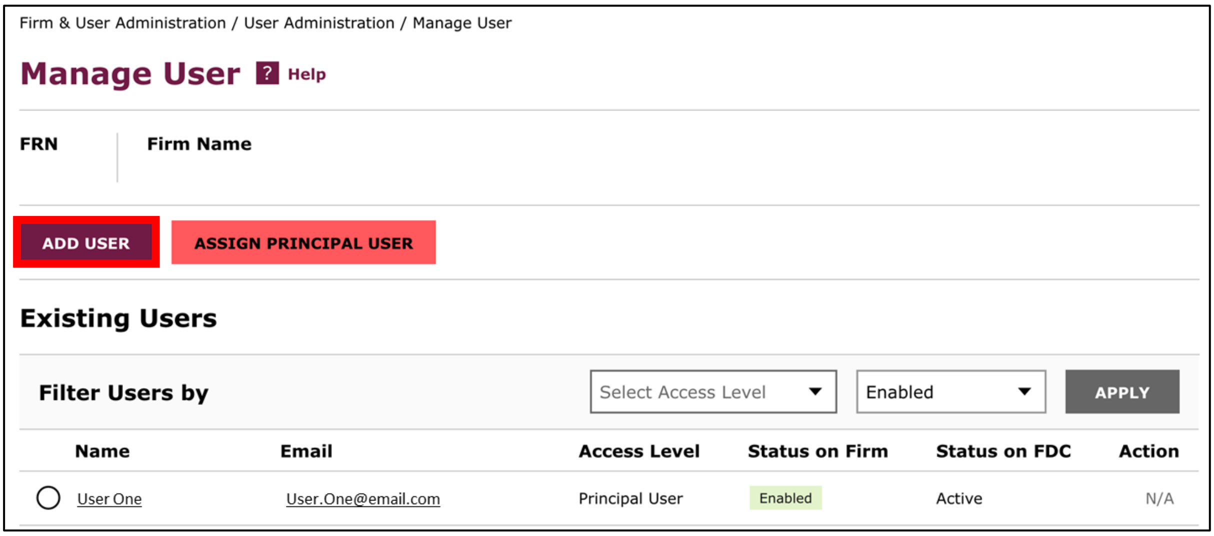
1. Adding a user

As a firm's Principal User or Firm Administrator, you can add a user.

After logging in, hover over Firm & User Administration, then hover over User Administration, and then click on **Manage User**:

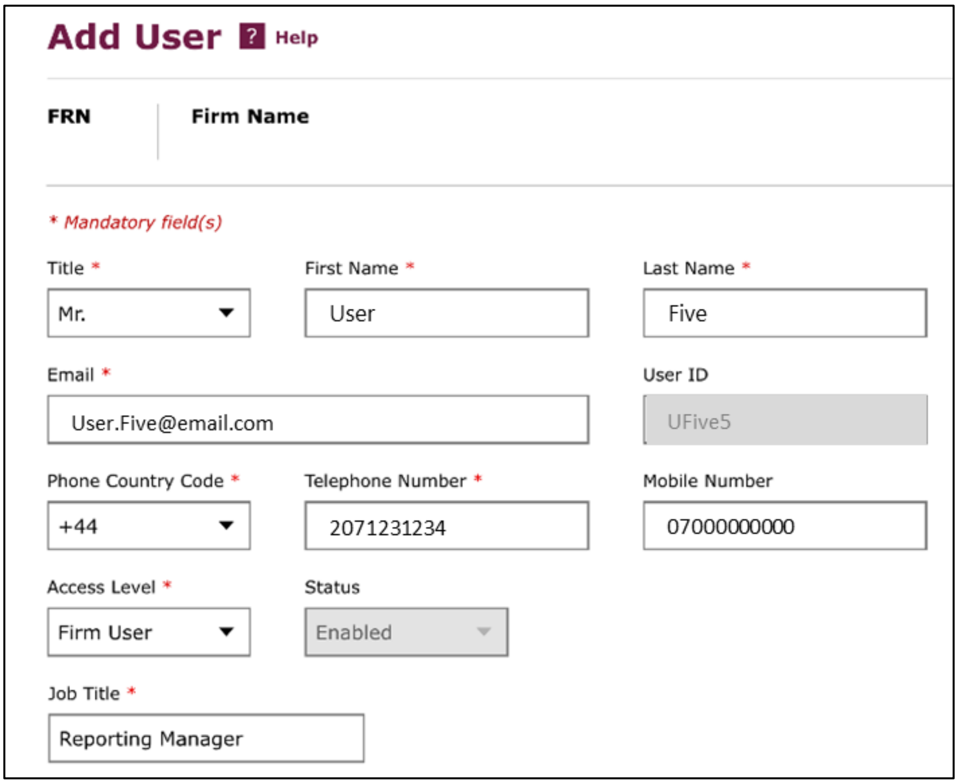


On the Manage User screen, click on **add user**:

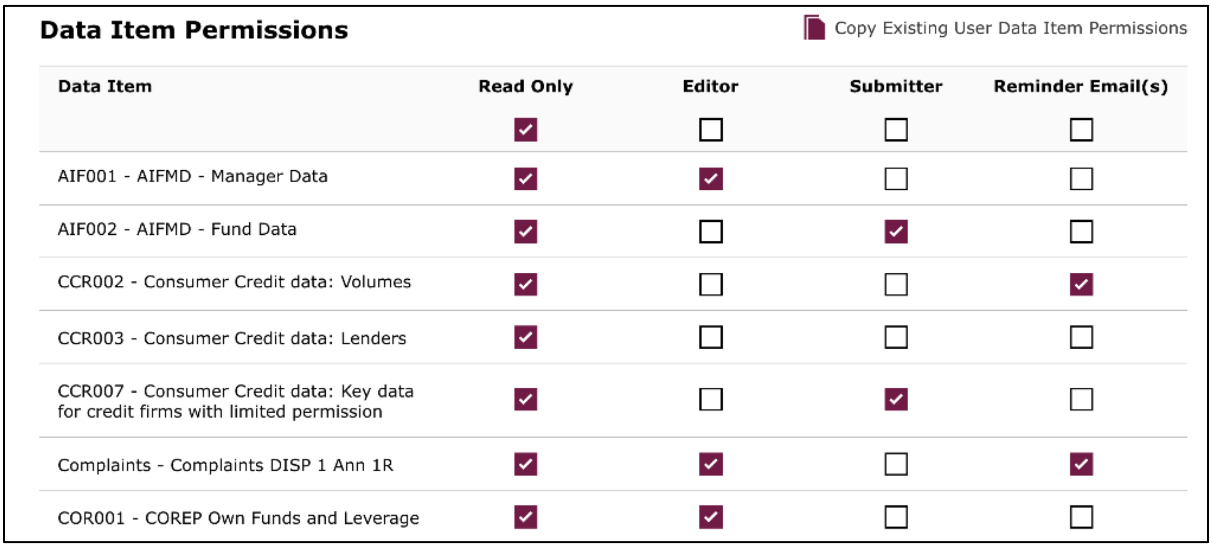


At the top of the screen, enter the user’s details, including title, name, email address, phone number, job title, status on firm, and access level (ie firm user or firm admin).

Fields marked with an asterisk (*) are mandatory:



Scroll down the screen. Select what the user can do for each data item by ticking the appropriate box:



Data Item Permissions

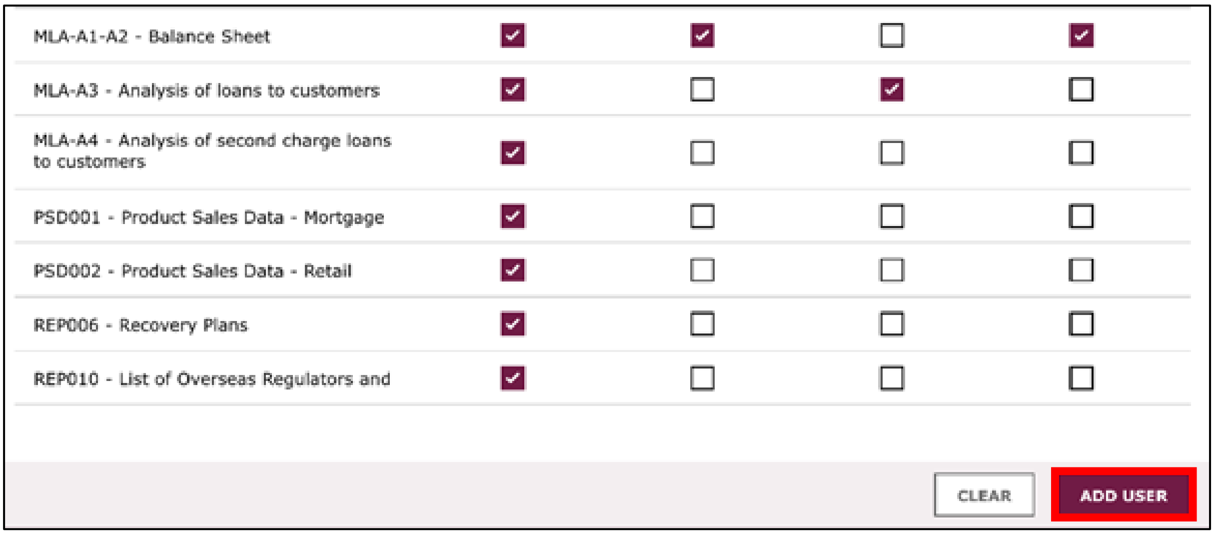
Copy Existing User Data Item Permissions

Data Item	Read Only	Editor	Submitter	Reminder Email(s)
	☑	☐	☐	☐
AIF001 - AIFMD - Manager Data	☑	☑	☐	☐
AIF002 - AIFMD - Fund Data	☑	☐	☑	☐
CCR002 - Consumer Credit data: Volumes	☑	☐	☐	☑
CCR003 - Consumer Credit data: Lenders	☑	☐	☐	☐
CCR007 - Consumer Credit data: Key data for credit firms with limited permission	☑	☐	☑	☐
Complaints - Complaints DISP 1 Ann 1R	☑	☑	☐	☑
COR001 - COREP Own Funds and Leverage	☑	☑	☐	☐

The options for user permissions on each form are:

- **Read only** – the user can view the form but can't edit it
- **Editor** – the user can input and change data in the form
- **Submitter** – the user can edit and submit the completed form
- **Reminder Email(s)** – the user can receive reminder emails about upcoming submissions

Click on **add user**:

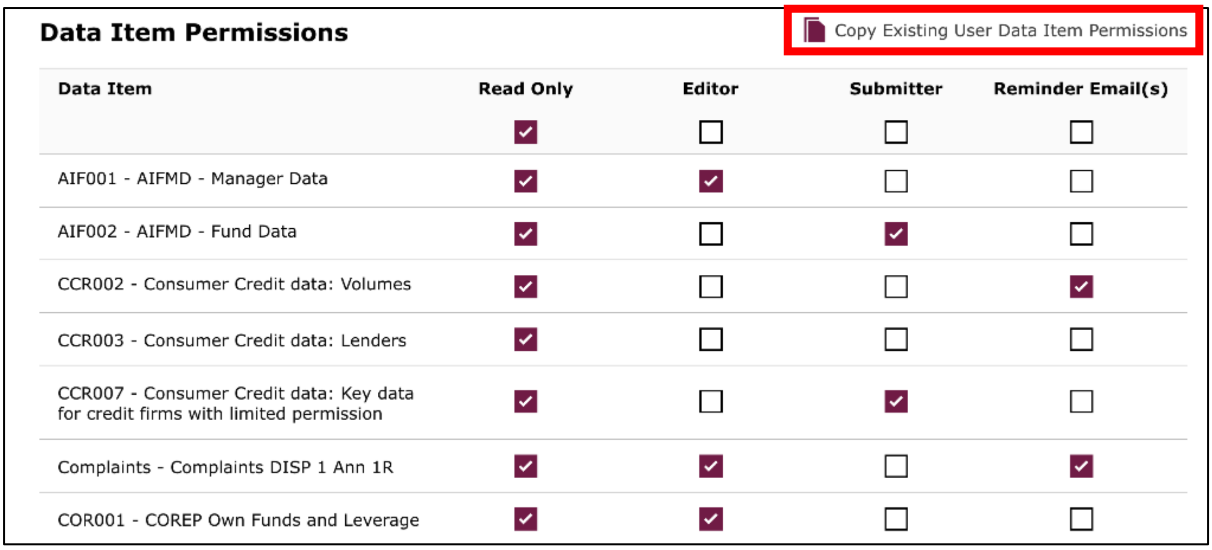


At the top of the screen, you'll see confirmation that you've successfully added the user. The new user will receive an email to inform them they've been added:

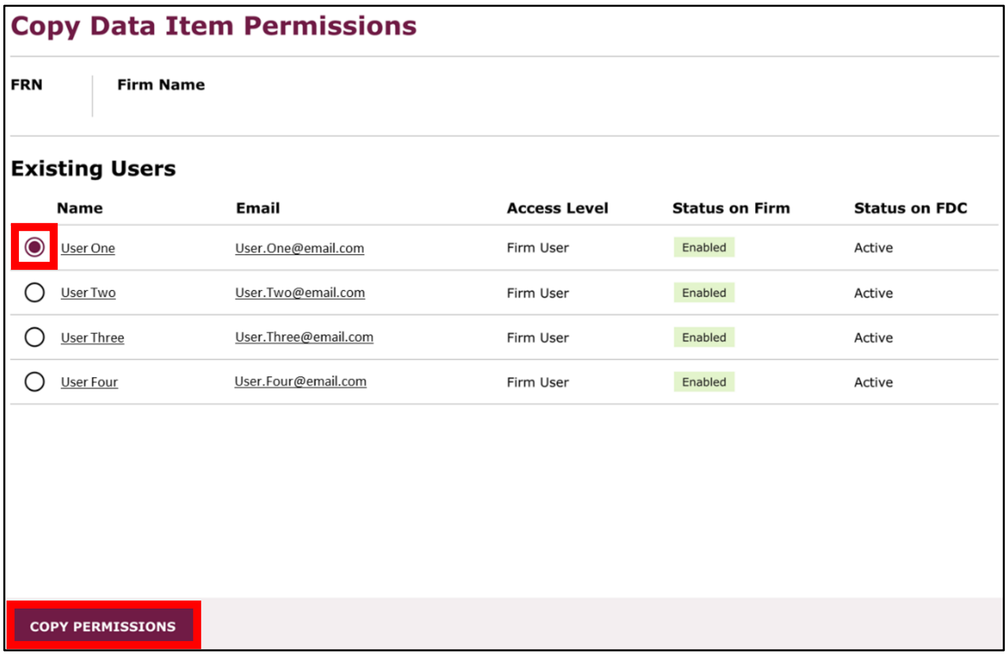
2. Copying a user's permissions

If you want a new user to have the same permissions as an existing user, you can copy their permissions.

Click on **Copy Existing User Data Item Permissions**:



Select the user you wish to copy permissions for, and click on **copy permissions**:



At the top of the screen, you'll see confirmation that you've successfully added the user. The new user will receive an email to inform them that they have been added: