

## **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**:

Change Firm	Reporting Schedule	Submission History	Upload Data 🗸	Product Sales Data 🗸	AIFMD 🗸	Firm & User Administrat	ion 🗸	
				Manage User	c	User Administration	>	: PDF
Report	ing Sched	ule		Assign Princi	ipal User	Firm Administration	>	
	2					Manage Web Service A	ccount	
FRN	Firm Name					_		

On the Manage User screen, click on add user:

Firm & User Administration / User Administration / Manage User							
Manage User 2 Help							
FRN Firm	Name						
ADD USER	ASSIGN PRINCIPAL USER						
Existing User	'S						
Filter Users b	y	Select Access Level    Enabled   APPLY					
Name	Email	Access Level Status on Firm Status on FDC Action					
O User One	User.One@email.com	Principal User Enabled Active N/A					

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).

Add User 2 Help						
FRN Firm Na	ame					
* Mandatory field(s)						
Title *	First Name *	Last Name *				
Mr. 🔻	User	Five				
Email *		User ID				
User.Five@email.com	1	UFive5				
Phone Country Code *	Telephone Number *	Mobile Number				
+44 🔻	2071231234	0700000000				
Access Level *	Status					
Firm User 🔻	Enabled -					
Job Title *						
Reporting Manager						

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)	
	<b>~</b>				
AIF001 - AIFMD - Manager Data	~	~			
AIF002 - AIFMD - Fund Data	<b>~</b>		~		
CCR002 - Consumer Credit data: Volumes	<b>~</b>			<b>V</b>	
CCR003 - Consumer Credit data: Lenders	~				
CCR007 - Consumer Credit data: Key data for credit firms with limited permission			~		
Complaints - Complaints DISP 1 Ann 1R	<b>~</b>	×		<b>~</b>	
COR001 - COREP Own Funds and Leverage	<b>~</b>	<b>~</b>			

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:

MLA-A1-A2 - Balance Sheet	×	<b>V</b>		×
MLA-A3 - Analysis of loans to customers	1		×	
MLA-A4 - Analysis of second charge loans to customers	×			
PSD001 - Product Sales Data - Mortgage	×			
PSD002 - Product Sales Data - Retail	×			
REP006 - Recovery Plans	×			
REP010 - List of Overseas Regulators and	×			
			c	LEAR 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:

Data Item Permissions			Copy Existing User Data Item Permissions		
Data Item	Read Only Editor		Submitter	Reminder Email(s)	
	<b>~</b>				
AIF001 - AIFMD - Manager Data	~	~			
AIF002 - AIFMD - Fund Data	<b>~</b>		~		
CCR002 - Consumer Credit data: Volumes	×			×	
CCR003 - Consumer Credit data: Lenders	<b>~</b>				
CCR007 - Consumer Credit data: Key data for credit firms with limited permission			~		
Complaints - Complaints DISP 1 Ann 1R	<b>~</b>	~		<b>~</b>	
COR001 - COREP Own Funds and Leverage	<b>~</b>	~			

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

Со	Copy Data Item Permissions							
FRN	Firm Name							
Exi	sting Users							
	Name	Email	Access Level	Status on Firm	Status on FDC			
$\bigcirc$	<u>User One</u>	User.One@email.com	Firm User	Enabled	Active			
0	User Two	User.Two@email.com	Firm User	Enabled	Active			
0	User Three	User.Three@email.com	Firm User	Enabled	Active			
0	User Four	User.Four@email.com	Firm User	Enabled	Active			
со	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:

Search Firm	Reporting Schedule	Submission History	Upload Data 🗸	Product Sales Data 🗸	AIFMD 🗸	Firm & User Administration $\vee$
User su	iccessfully added to	the firm. A notificati	on email has bee	en sent to the user.		×