

# RegData user guide

## Adding a user

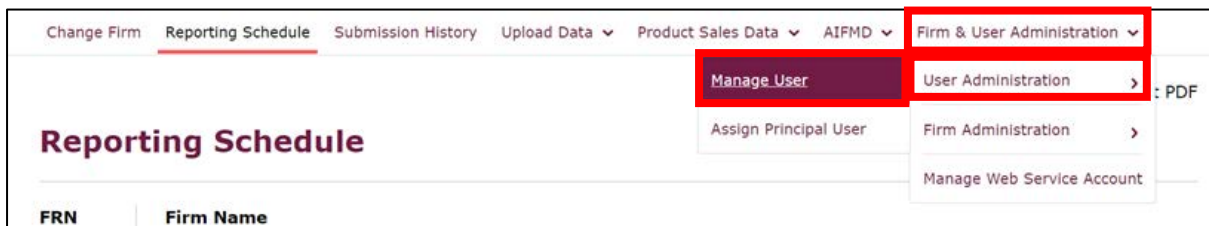
This user guide explains how to:

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

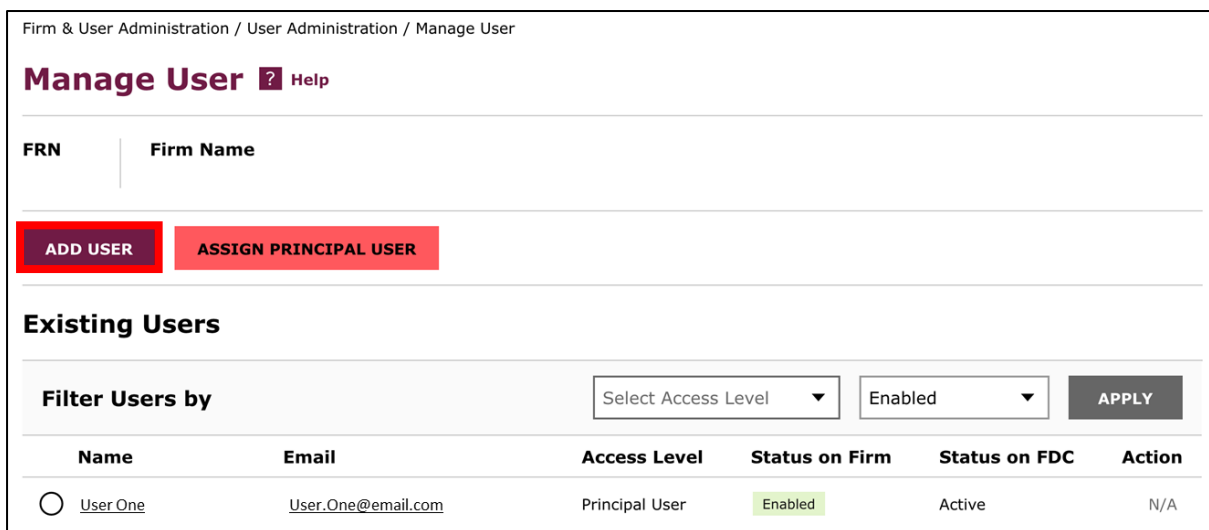
### 1. Adding a user

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:

**Add User** ? [Help](#)

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**FRN** | **Firm Name**

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\* Mandatory field(s)

Title \*      First Name \*      Last Name \*

Mr. ▼      User      Five

Email \*      User ID

User.Five@email.com      UFive5

Phone Country Code \*      Telephone Number \*      Mobile Number

+44 ▼      2071231234      07000000000

Access Level \*      Status

Firm User ▼      Enabled ▼

Job Title \*

Reporting Manager

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

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

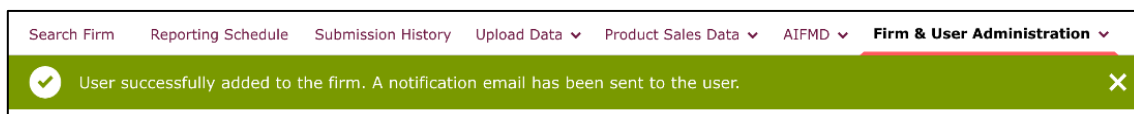
The options for user permissions on each form are:

- **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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MLA-A3 - Analysis of loans to customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MLA-A4 - Analysis of second charge loans to customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSD001 - Product Sales Data - Mortgage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSD002 - Product Sales Data - Retail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REP006 - Recovery Plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REP010 - List of Overseas Regulators and	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

 Copy Existing User Data Item Permissions

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

### Copy Data Item Permissions

FRN  Firm Name

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**Existing Users**

Name	Email	Access Level	Status on Firm	Status on FDC
<input checked="" type="radio"/> User One	User.One@email.com	Firm User	Enabled	Active
<input type="radio"/> User Two	User.Two@email.com	Firm User	Enabled	Active
<input type="radio"/> User Three	User.Three@email.com	Firm User	Enabled	Active
<input type="radio"/> User Four	User.Four@email.com	Firm User	Enabled	Active

**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

 User successfully added to the firm. A notification email has been sent to the user.
