

# RegData user guide

## Changing user details

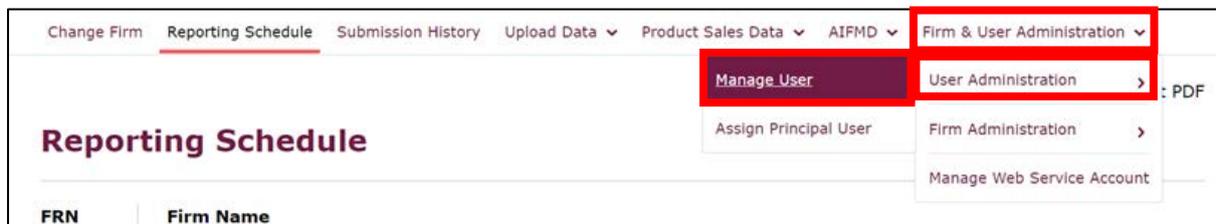
This user guide explains how to:

- change a user's details within RegData
- copy a user's permissions

### 1. Changing user details

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

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



Select the user you wish to change details for, and click on **Edit**:

## Manage User ? Help

FRN | Firm Name

**ADD USER**

**ASSIGN PRINCIPAL USER**

### Existing Users

Filter Users by

Select Access Level

Enabled

APPLY

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

You can edit any field that isn't greyed out (eg user ID). This includes the type of access the user has on RegData (whether they are a Firm Administrator or Firm User):

### Edit User Details ? Help

FRN | Firm Name

*\* Mandatory field(s)*

Title \*  First Name \*  Last Name \*

Email \*  User ID

Phone Country Code \*  Telephone Number \*  Mobile Number

Access Level \*  Status on Firm \*

Job Title \*

When you scroll down the screen, you'll find the permissions the user has for each item.

Tick or untick the relevant boxes to change what a user can do on a data item:

<b>Data Item Permissions</b>		 Copy Existing User Data Item Permissions			
<b>Data Item</b>	<b>Read Only</b>	<b>Editor</b>	<b>Submitter</b>	<b>Reminder Email(s)</b>	
	<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 different 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

After making your changes, click on **save details**:

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"/>

CANCEL **SAVE DETAILS**

At the top of the screen, you'll see confirmation once these details have been successfully updated.

## 2. Copying a user's permissions

If you wish to give a user the same permissions as another user, 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"/>

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

Copy Data Item Permissions				
FRN	Firm Name			
<b>Existing Users</b>				
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
<b>COPY PERMISSIONS</b>				

At the top of the screen, you'll see confirmation once these details have been successfully updated.