

Evident.

I-REC Registry User Guide

UG-03: Registrant

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1 Becoming a Registrant

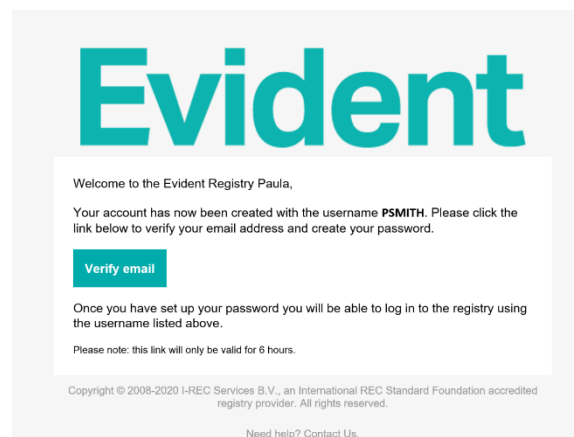
To become a Registrant and submit your renewable energy projects for registration it is first necessary to have a contract with an Issuer. Issuers may provide services in one or more countries.

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 username and password.

If you have forgotten your access details or password, please contact the I-REC Helpdesk at:
helpdesk@evident.global



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.

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

You need to know which Issuer you will be using for the registration process.

Each Issuer or country may have a different set of documentation required to support a Device registration. If you are unsure, please check with your Issuer beforehand to determine what information and supporting documents that they require to process a Device registration and have that documentation ready to be uploaded 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

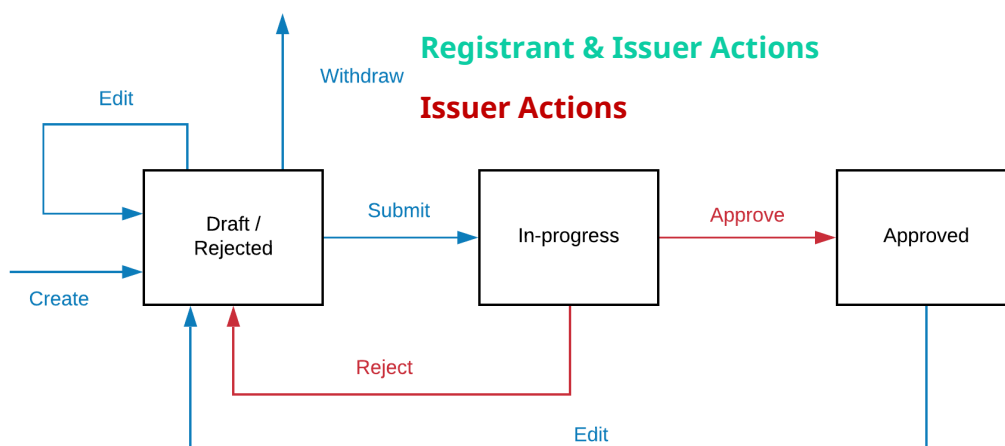


Figure 1 Production Device Registration Process



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.

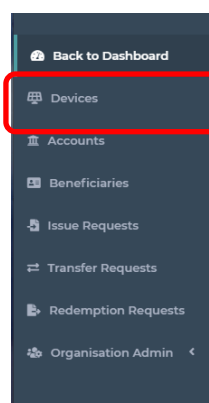
Once a Device registration request has been approved by the Issuer the Device will be viewed by the Registry as being *Approved*. At this point, issue requests may be made against the Device and the Device will appear on the Registry's public Device register.

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 Device"

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





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3.5.3 Enter Device Details

Enter the general information relating to the Device.

Device Name *	<input type="text"/>	The name of the device.
Default Account Code	<input type="text"/>	If you are planning to deposit issue requests into a trade account owned by your organisation, you can select the default account to deposit them to. (This can be overwritten when making an issue request). If you are planning to deposit issue requests into another organisations' account please leave this value blank.
Issuer Code *	<input type="text" value="Please choose..."/>	The issuer you wish to issue certificates for this device.

Next

The following table describes the data fields on this form:

Field	Description
Device Name	The name of the Device, for example “Sheffield Wind Farm”. The device name must be consistent with any name used elsewhere, such as registration with a network operator or in planning documents. This field must be longer than 4 characters.
Default Account Code	This field is optional. 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. If you do not have Participant permissions, or do not wish to set this, you may leave it blank. Please note, when creating an issue request this value can be changed.
Issuer Code	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.



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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.

Device Fuel *	<div>Please choose... ▼</div>	Select the fuel type used by this device.
Device Technology *	<div>Please choose... ▼</div>	Select the specific technology the device uses.
Capacity *	<div>123.456789 MW</div>	Enter the device's capacity in mega watts (MW).
Commissioning Date *	<div>Year ▼ Month ▼ Day ▼</div>	Select the date the device was commissioned. This date must be in the past.
Requested Effective Registration Date *	<div>Year ▼ Month ▼ Day ▼</div>	Select the date you wish this device registration to be effective from. This date must be in the past and after the commissioning date.
Other Labelling Scheme	<div>▼</div>	If this Device qualifies for another labelling scheme, please specify which scheme here.

Previous

Next

The following table describes the data fields on this form:



Field	Description
Device Fuel	<p>Please choose from the dropdown menu the primary fuel used by this Device.</p> <p>This can be changed when issuing certificates from this Device.</p>
Device Technology	<p>Please enter the technology type used by this Device from the dropdown menu.</p>



Field	Description
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 recoding capacity to the W level. Capacity will be recorded as:</p> <ul style="list-style-type: none">○ '1.000000' = 1MW○ '0.001000' = 1kW○ '0.000001' = 1W
Commissioning Date	<p>Please enter the date in which the Device was first commissioned.</p>
Requested Effective Registration Date	<p>Please enter the date in which the Device was registered.</p>
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.



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3.5.5 Enter Location Information

Enter the location information relating to the Device.

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.

Country Code *


Please choose...

Select the country where the device is located.

Latitude * Longitude *

53.405088 -1.744222

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



Previous Next

The following table describes the data fields on this form:

Field	Description
Address	Enter the full address for the Device you wish to register.
Country code	Enter the country for the Device you wish to register.
Latitude/Longitude	Either manually enter in 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

The Issuer may, as part of the Device registration process, require evidence and other documentation to be provided to support their review. If you are unsure, please check with your Issuer beforehand to determine what information and supporting documents that they require to process a Device registration and have that documentation ready to be uploaded into the Registry. Common requirements include Single Line Diagrams (SLDs), Owner's Declarations, Photographs, and Sample Production Evidence.

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.

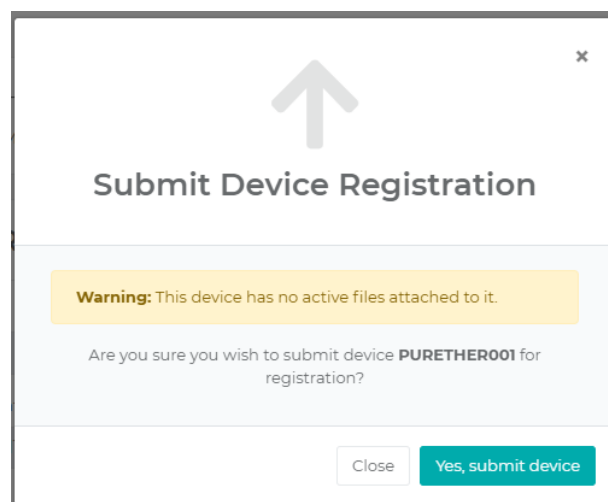


There are four options to choose from:

- **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, this cannot be undone.
- **Close** – Cancel and close the form, any changes will be lost.

3.6.2 Confirmation

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



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



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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.

A screenshot of a 'Legal Confirmation' dialog box. At the top is a large upward-pointing arrow and the title 'Legal Confirmation'. Below this is a light blue box with the text 'Info: Please read the following legal confirmation carefully.' The main body contains several paragraphs of legal text regarding the I-REC Code, including statements about agreement to terms, planned changes, unplanned changes, and the requirement for a signed registration form CSD04. At the bottom right are two buttons: 'Close' and '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.

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

ID	Name	Issuer	Country	Fuel Type	Status	Actions
SOLARPRK01	Sheffield Solar Park	The Green Certificate Company (Central Issuer)	GB	ES100 - Solar	In-progress	

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.

DGADGADG	SHEFFIELD01	Test Issuer	KZ	ES300 - Hydro electric	SID and metering evidence missing.	Edit
STCHAMASHYD	Saint Chamas Hydro Power Plant	Test Issuer	FR	ES300 - Hydro electric	Rejected	Edit



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 where you will be able to **Archive** (delete) files that have been uploaded to it, as shown below.



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

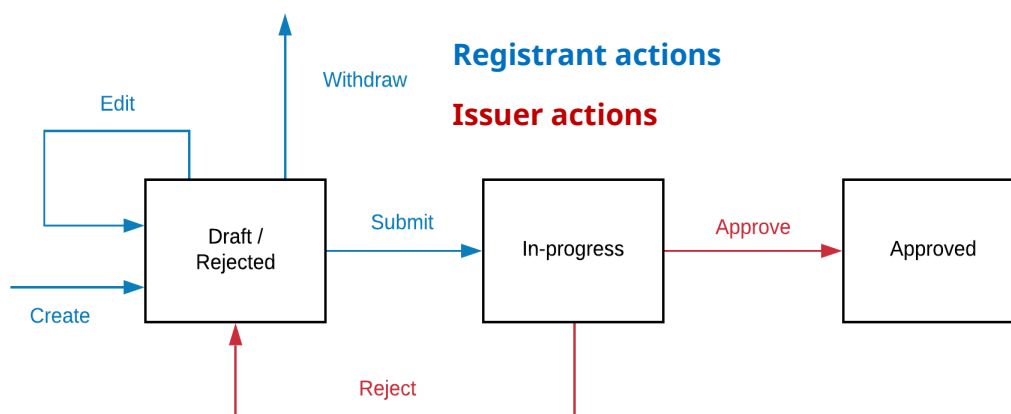


Figure 2 Issue Request Process

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*.



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.

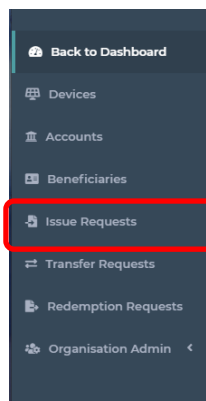
Once a Registrant has submitted an Issue Request for approval, the Issuer may **Reject** it back to them, leaving a note explaining the reasoning behind the rejection. When an Issue Request has been rejected the Registrant will need to amend it by editing, saving and re-submitting it; alternatively,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

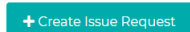
4.4.1 Navigate to Issue Requests

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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New Issue Request✓ Create draft✕ Close

Device code *

Please choose...

Recipient account code *

Trade account code

Fuel code *

Please choose...

Start date *

Year ▾ Month ▾ Day ▾

End date *

Year ▾ Month ▾ Day ▾

Period Production *

123.456789

MWh

Notes

Upload Files

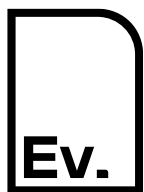
Drop files here or click to upload

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

Once that 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.
Period production	<p>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:</p> <ul style="list-style-type: none">○ '1.000000' = 1MWh○ '0.001000' = 1kWh○ '0.000001' = 1Wh



Data field	Description
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 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.

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.




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4.5.1 Submit for Approval

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

Device	Recipient Account	Fuel Code	Start Date	End Date	Period Production	Status	Actions
Sheffield Wind Farm 01	DEMO001	ES200 - Wind	2020-01-01	2020-11-30	25,000	Draft	 Edit

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

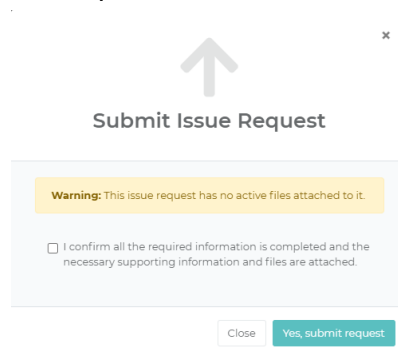


There are four options to choose from:

- **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, this 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 requesting confirmation that the information is complete, and that all required files and documents have been uploaded.



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.

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.

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

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 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	Status
Sheffield Wind Farm 01	DEMO001	ES200 - Wind	2020-01-01	2020-11-30	25,000	In-progress

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



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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.

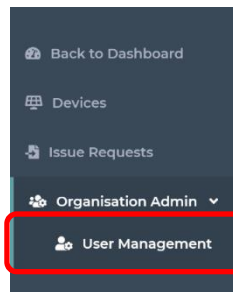


5 Managing Users

5.1 Create a New User

5.1.1 Navigate to User Management

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



5.1.2 Select "Create New User"

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



5.1.3 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.

The following table describes the data fields on this form:

Field	Description
Username	An 8-12 character, no spaces, uppercased code for the user. For example: "TOMSMITH", "SLJONES".

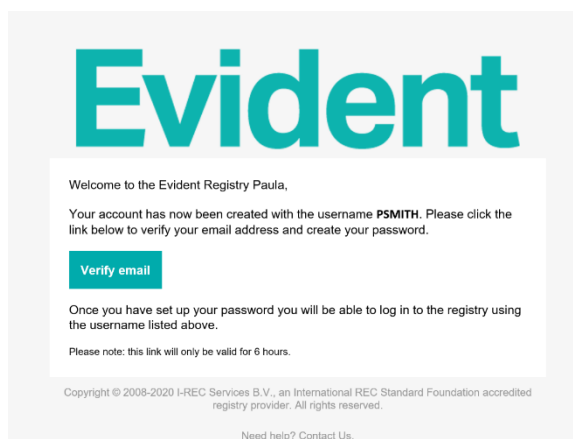


Field	Description
Title	The title of the user.
Forename	The forename of the user.
Surname	The surname of the user.
Telephone	A contact number for the user.
Email	The user's email address. This must be a valid email address so the newly created user can verify their account.
Active	Whether or not the 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 5.2).
- **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.





5.2 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 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.

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 7 for further details). You can select or

Edit Permissions for TESTUSER

Reset permissions Save Close

Device Management

- ☒ Set all permissions for device management
 - ☐ **Create:** Allow user to be able to create new devices
 - ☐ **Edit:** Allow user to be able to edit individual devices
 - ☐ **Index:** Allow user to be able to view device management section
 - ☐ **Submit:** Allow user to be able to submit devices for verification from your issuer
 - ☐ **View:** Allow user to be able to view individual devices
 - ☐ **Withdraw:** Allow user to be able to withdraw a device from the device registration process

File Management

- ☒ Set all permissions for file management
 - ☐ **Archive:** Allow user to be able to archive files from the registry
 - ☐ **Download:** Allow user to be able to download files from the registry
 - ☐ **Remove:** Allow user to be able to remove files from the registry
 - ☐ **Upload:** Allow user to be able to upload files into the registry

deselect a permission by clicking the box to the left of each option.

There are three options to choose from:

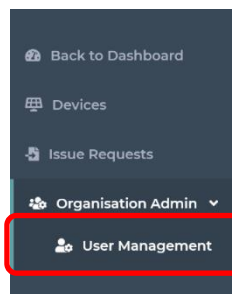
- **Reset permissions** – This will set the user's permissions for the default for their organisation.
- **Save** – This will save the user record with permissions set on the form.
- **Close** – Cancel and close the form, any changes will be lost.



5.3 Edit a User

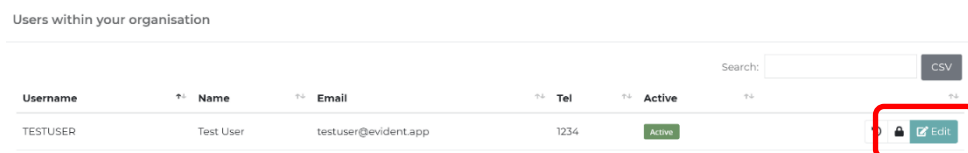
5.3.1 Navigate to User Management

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



5.3.2 Edit User Details

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



5.3.3 Update User Details

Update details as required.

The following table describes the data fields on this form:

Field	Description
Username	An 8-12 character, no spaces, uppercased code for the user. For example: "TOMSMITH", "SLJONES".
Title	The title of the user.
Forename	The forename of the user.



Field	Description
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 three options to choose from:

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

5.4 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.

Users within your organisation

					Search: <input type="text"/>	CSV
Username	Name	Email	Tel	Active		
TESTUSER	Test User	testuser@evident.app	1234	Active		 

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 7 for further details). You can select or deselect a permission by clicking the box to the left of each option.



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Edit Permissions for TESTUSER

Reset permissions Save Close

Device Management

- ☒ Set all permissions for device management
 - ☐ **Create:** Allow user to be able to create new devices
 - ☐ **Edit:** Allow user to be able to edit individual devices
 - ☐ **Index:** Allow user to be able to view device management section
 - ☐ **Submit:** Allow user to be able to submit devices for verification from your issuer
 - ☐ **View:** Allow user to be able to view individual devices
 - ☐ **Withdraw:** Allow user to be able to withdraw a device from the device registration process

File Management

- ☒ Set all permissions for file management
 - ☐ **Archive:** Allow user to be able to archive files from the registry
 - ☐ **Download:** Allow user to be able to download files from the registry
 - ☐ **Remove:** Allow user to be able to remove files from the registry
 - ☐ **Upload:** Allow user to be able to upload files into the registry

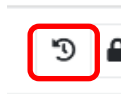
There are three options to choose from:

- **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 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.





7 Permissions

7.1 Device Management

Permission	Description
Device Management GLOBAL	Grants permission for all below permissions.
Device Management INDEX	Grants permission to view the Device management functions.
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 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.

7.2 Issue Requests

Permission	Description
Issue Request GLOBAL	Grants permission for all below permissions.
Issue Request INDEX	Grants permission to view the issue request functions.
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 WITHDRAW	Grants user the ability to withdraw (delete) an issue request.



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

7.3 User Management

Permission	Description
User Management GLOBAL	Grants permission for all below permissions.
User Management INDEX	Grants permission to view the user management functions.
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 view changes made to users in their organisation.
User Management PERMISSIONS	Grants user the ability to change a user's permissions.



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