Evident.

I-REC Registry User Guide

UG-04: Participant

Version: 2.11

Release Date: 09 October 2022

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I-REC STANDARD

Document Control

Document ID	EC-IRE-UG04
Document Name	Evident. I-REC Code for Electricity UG-04: Participant
Version	2.11

Author	Evident
Owner	Evident Ev Limited
Authoriser	Evident

Release Date	09 October 2022

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1 Becoming a Participant

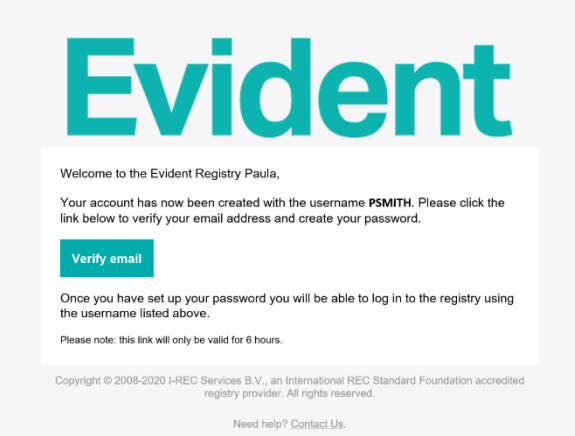
To become a Participant and trade or redeem I-REC certificates it is first necessary to have a contract with Evident, who provides global Registry services for Participants.

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 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.

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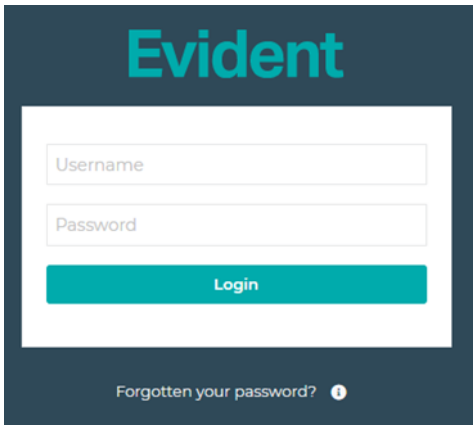
2 Access to the Registry

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

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3 Accounts

Participants can self-manage their Accounts within the Registry.

Accounts within the Registry function in a similar way to a bank account. I-REC certificates can be transferred between Accounts as evidence of ownership.

3.1 Participant Account Types

There are two categories of Account that Participants can create.

3.1.1 Trade Accounts

Trade Accounts are only available to Participants. Trade Accounts are accounts where certificates can be transferred in and out without restriction, similar to a conventional bank account. When an Issuer creates I-RECs they must be deposited into a Trade account.

Certificate holdings within a Trade Account are not eligible for an End User claim until they have been **redeemed** (see section 6).

3.1.2 Redemption Accounts

Redemption Accounts are only available to Participants. Redemption Accounts are accounts where certificates can be transferred in for the sole purpose of allocating the benefit to an End User (known as a Beneficiary). This process represents the final action in a certificate's life and cannot be reversed.

Certificate holdings within a Redemption Account are uniquely allocated to a Beneficiary for the purposes of End User claims (see section 5).

A single Redemption Account can be used for multiple Beneficiaries.

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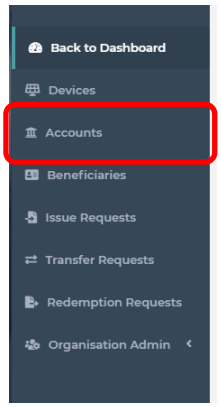
3.2 Create an Account

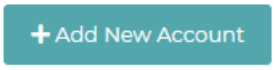
3.2.1 Navigate to Accounts

On the left-hand navigation column, click **Accounts**.



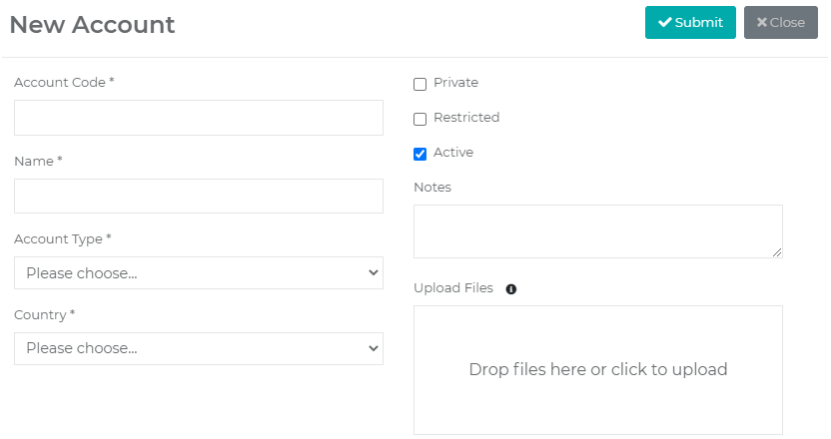
3.2.2 Click on "Add New Account"

In the top-right hand corner, click the button **Add New Account** button.



3.2.3 Enter Account Details

Enter the information relating to the Account.



The following table describes the data fields on this form:

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Field	Description
Account Code	An 8-12 character, no spaces, uppercased code for the account. For example: “TRADEACC001”, “REDACC002”.
Name	The full name of the account.
Account Type	For Participants this must be Trade or Redemption.
Country	The country you wish to associate the account with.
Private	Whether or not the account should be private.
Restricted	Whether or not the account should be restricted.
Active	Whether or not the account should be active. An inactive account cannot be used for any new transactions.
Notes	Any additional notes or comments for the account. For example, explaining what this account will be used for.
Upload Files	Any files that are associated with the account.

Once created, an Account cannot be deleted or have its Account Code or Account Type modified. If an Account is no longer required, it should be marked as **Inactive**.

3.2.4 Create Account and Save

Once all the information supplied is complete and correct you can save the Account details. There are two options to choose from:

- **Submit** – This will create your new account and return you to the main Account Management page.
- **Close** – Cancel and close the form, any changes will be lost.

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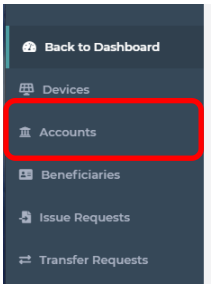
3.3 Edit an Account

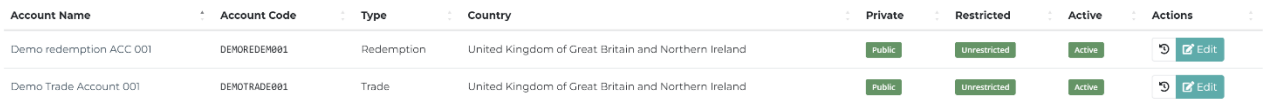
3.3.1 *Navigate to Accounts*

On the left-hand navigation column, click **Accounts**.



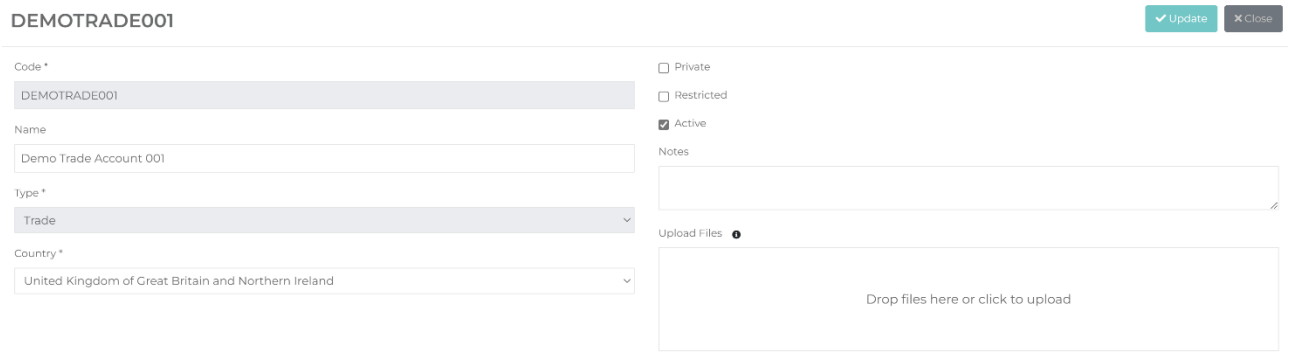
3.4 Select an Account

Click the Edit button to view the account details.



3.4.1 *Edit Account Details*

Enter the information relating to the Account.



The following table describes the data fields on this form:

Field	Description
Account Code	This cannot be changed.
Name	The full name of the account.

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Field	Description
Account Type	This cannot be changed.
Country	The country you wish to associate the account with.
Private	Whether or not the account should be private.
Restricted	Whether or not the account should be restricted.
Active	Whether or not the account should be active. An inactive account cannot be used for any new transactions.
Notes	Any additional notes or comments for the account. For example, explaining what this account will be used for.
Upload Files	Any files that are associated with the account.

If an Account is no longer required, it should be marked as **Inactive**.

3.4.2 Update Account and Save

Once all the information supplied is complete and correct you can save the Account details. There are two options to choose from:

- **Update** – This will update your account and return you to the main Account Management page.
- **Close** – Cancel and close the form, any changes will be lost.

3.5 Troubleshooting & FAQs

3.5.1 What is a private account?

If a Trade Account is marked as **private**, only members of your organisation can transfer certificates into this account.

Trade Accounts that are not private can be used to receive certificates from other organisations. You need at least one Trade Account that is not private.

Redemption Accounts are always restricted to your organisation so there is no need to set them as private.

3.5.2 What is a restricted account?

If an Account is marked as **restricted**, only selected users from your organisation can have access to the Account. A dropdown list of users within your organisation will appear when

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creating a restricted account. Only users selected from the drop-down list will be able to view, edit, access or transfer certificates out of this Account, regardless of permissions.

If an Account is not marked **restricted**, any users within your organisation with the permissions to do so, will be able to view, edit, access and transfer certificates out of this Account.

3.5.3 What Accounts do I need to set up?

A Participant that wishes only to trade, but not redeem, needs only a Trade Account. Participants can set up as many Trade Accounts as they wish in order to manage their business as they see fit, but only one is required.

A Participant that wishes to redeem I-RECs needs a Redemption account. Participants can set up as many Redemption Accounts as they wish in order to manage their business as they see fit, but only one is required.

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4 Transfers

4.1 Pre-requisites

When transferring certificates, it is a requirement that the Account Code of the intended receiving account be known. Account codes are verified to ensure that they are valid.

4.2 Process Overview

Creating a transfer request is a multi-step process, all actioned within the Participant organisation. It is not necessary for the recipient to confirm a transfer.

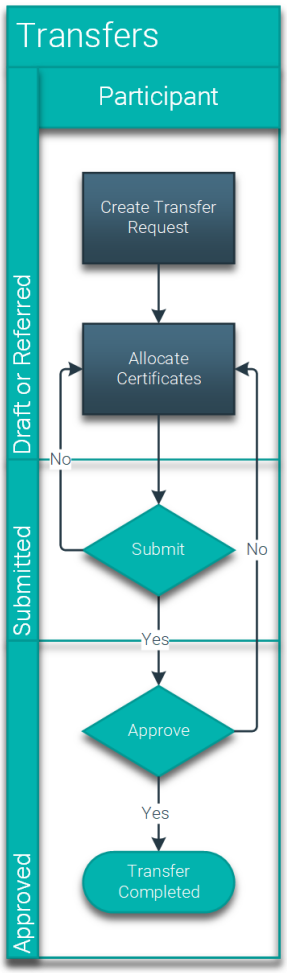

Figure 1 Transfer Process

Processing of a transfer moves through three primary states, *Draft*, *Submitted* and *Approved*. A *Submitted* transfer request can be *Referred* back to the *Draft* stage.

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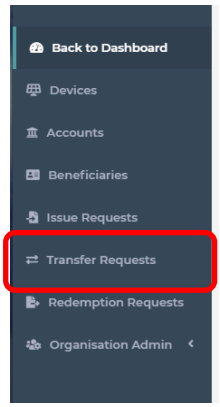
A transfer request that has not been *Approved* can be deleted.

A single user with appropriate permissions can process a transfer. Alternatively, a different user may approve a submitted transfer. If required, permissions can be set so that different users submit and approve transfers.

4.3 Transfer Certificates

4.3.1 Navigate to Transfer Requests

On the left-hand navigation column, click **Transfer Requests**.



4.3.2 Click on Create Transfer

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

4.3.3 Enter Transfer Details

Enter the details relating to the transfer request you wish to create.

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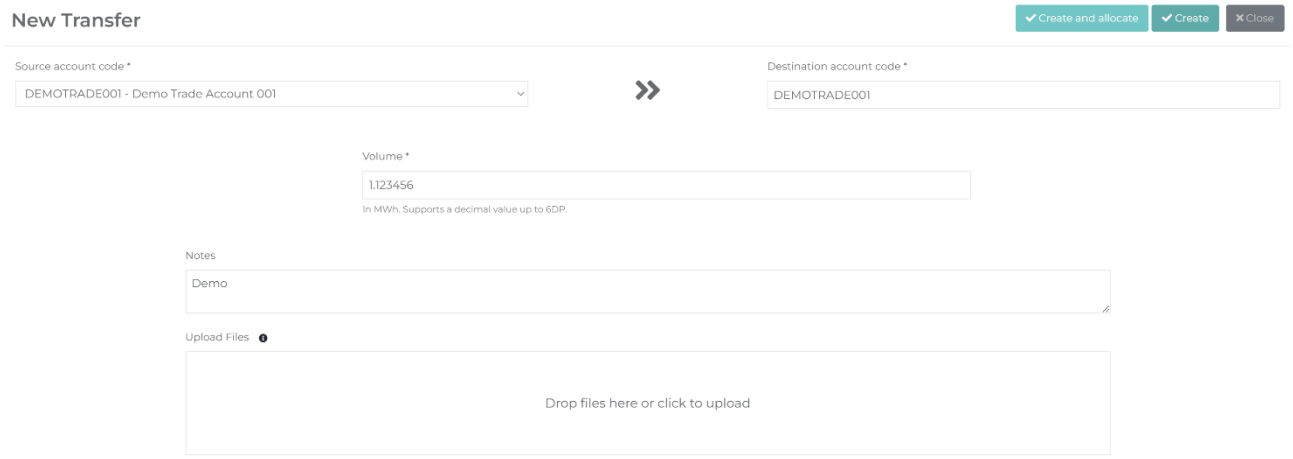


The following table describes the data fields on this form:

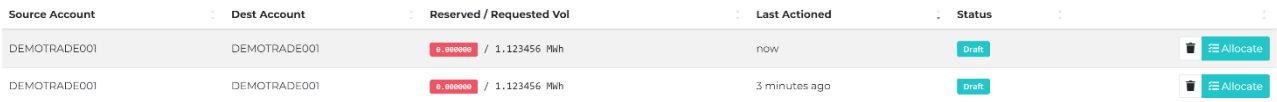
Field	Description
Source account code	The account code (owned by your organisation) from which you wish to transfer from.
Destination account code	The account code you wish to make the transfer to.
Volume	The amount of certificates you wish to transfer.
Notes	Any notes you wish to add to the transfer.
Upload Files	Any files that are associated with the transfer.

Once you have entered these details there are three options to choose from:

- **Create and allocate** – This will save the transfer request and open the screen for allocating certificates to the transfer.
- **Create** – This will save the transfer request and return to the previous page.
- **Close** – Cancel and close the form, any changes will be lost.

4.3.4 Allocate Certificates to Transfer Request

The screen for allocating certificates to a transfer is accessed either directly from the **Create and allocate** button previously described or by selecting the appropriate **Allocate** button on the list of draft transfer requests.



A list of available certificates from the selected source account will be then displayed.

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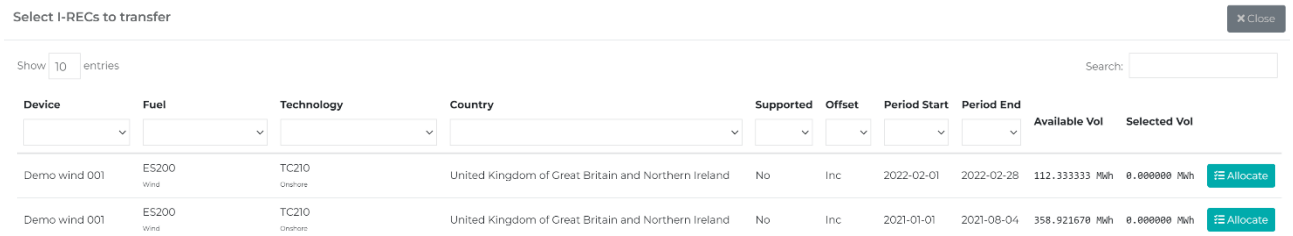
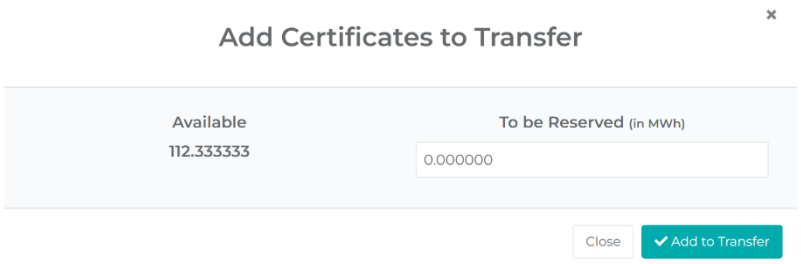


To allocate certificates from one of the rows to a transfer, click the **Allocate** button on the right-hand side of that row.

It is possible to select certificates from any number of rows up to the total volume specified for the transfer.

A pop-up box will appear with two values, **Available** and **To be Reserved**.

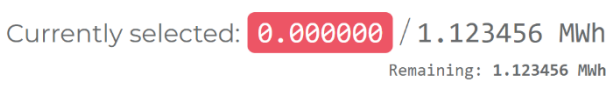


Enter the number of these certificates from this row that you wish to include add to the transfer request in the **To be Reserved** text box.

Once you have entered these details there are two options to choose from:

- **Add to Transfer** – This adds the requested volume to the draft transfer request.
- **Close** – Cancel and close the form, any changes will be lost.

The total of certificates allocated against the number required for the transfer is displayed in the top tight-hand corner of the page.



A transfer request can be kept as draft for as long as required.

Where certificates are allocated to a transfer request, they are not available to be added to other transfer or redemption requests.

4.3.5 Submit Transfer Request

Once the total required volume of certificates has been allocated the request, becomes available for submission. The selection display will be highlighted in green.

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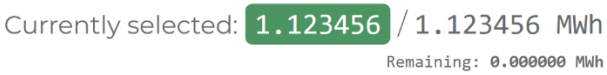
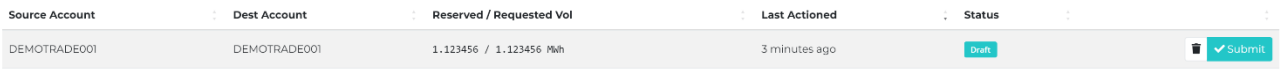
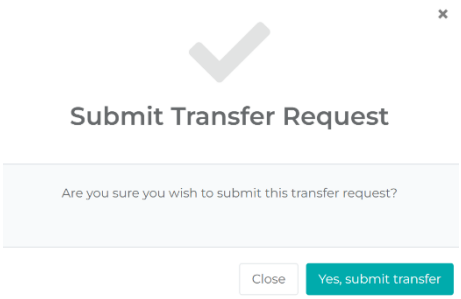




Click the **Submit** button at the right of the relevant row on the Transfer Requests list.

A confirmation form will be displayed with two options to choose from:

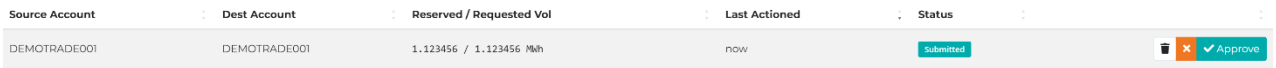
- **Yes, submit transfer** – This will submit the transfer request for approval.
- **Close** – Cancel and return.



Once a Transfer Request has been Submitted it becomes available for Approval or Referral. Referring a Transfer Request sends it one step to the equivalent of the Draft status and allows the Transfer Request to be modified.

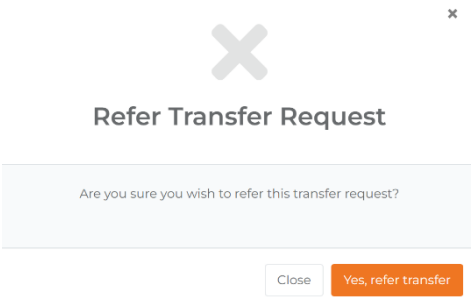
4.3.6 Refer a Transfer Request

To **Refer** a Transfer Request, click on the **X** button on the relevant row.



A confirmation form will be displayed with two options to choose from:

- **Yes, refer transfer** – This will refer the transfer request.
- **Close** – Cancel and return.



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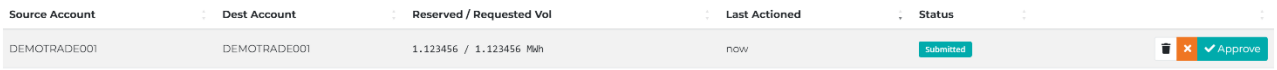
4.3.7 Approve a Transfer Request

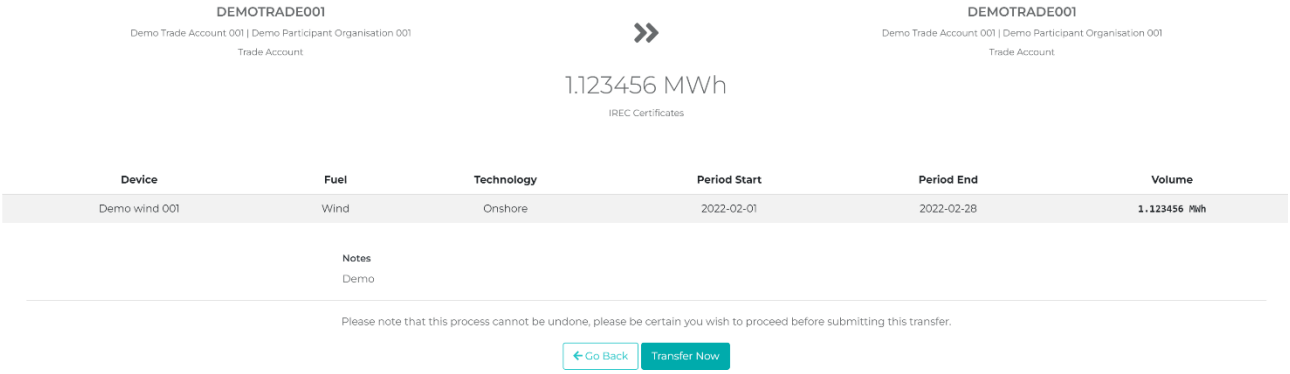
To Approve a Transfer Request, click the **Approve** button for the request you wish to verify.



A summary of the Transfer Request and the selected certificates will be displayed with two options to choose from:

- **Go Back** – Cancel and return.
- **Transfer Now** – This will refer complete the transfer process.

Warning: This process cannot be undone so please check the details carefully before continuing.



Once Approved, the completed Transfer Request will appear in the **Completed** Transfer Requests table.

Transfers complete immediately and the certificates will be lodged in the recipient account.

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5 Beneficiaries

A Beneficiary is an end-user, or consumer, who wishes to use a redemption statement in their consumption reporting. Where permitted, an energy retailer may also specify a "consumer tariff" as a Beneficiary.

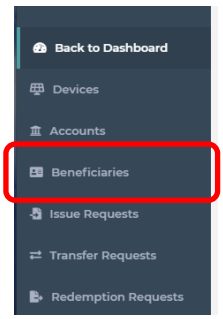
All Redemptions require a Beneficiary to be assigned. Beneficiary details will be presented on any redemption statement made against said Beneficiary. See section 7.

Best practice is to create a single Beneficiary for each consumption location. A single end-user organisation may therefore have many Beneficiaries associated with it. Consolidated reporting for organisations with multiple locations will be introduced during 2021. When released, all pre-existing Beneficiaries can be allocated to consolidation groups.

5.1 Create a Beneficiary

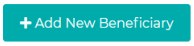
5.1.1 Navigate to Beneficiaries

On the left-hand navigation column, click **Beneficiaries**.



5.1.2 Click on "Add New Beneficiary"

In the top-right hand corner, click the **Add New Beneficiary** button.



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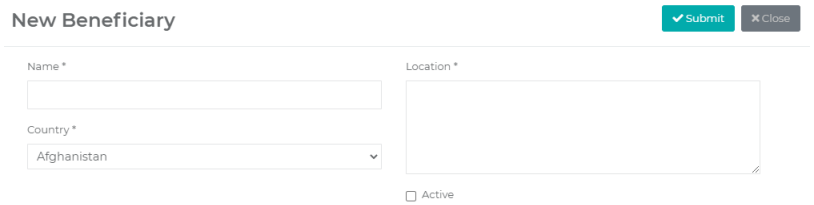
5.1.3 *Enter Beneficiary Details*

Enter the details for the Beneficiary you wish to create.



The following table describes the data fields on this form:

Field	Description
Name	The name of the end-user's company you wish to display on redemption statements.
Country	The country you wish to display on the redemption statements.
Location	A specific location or address you with to display on the redemption statements.
Active	Whether or not the beneficiary is active. If a beneficiary is marked as inactive, no further redemption statements may be made against it until it is marked as active again.

Once created, a Beneficiary cannot be modified. If a Beneficiary is no longer required, it should be marked as **Inactive**.

5.1.4 *Create Beneficiary and Save*

Once all the information supplied is complete and correct you can save the Account details. There are two options to choose from:

- **Submit** – This will create your new Beneficiary and return you to the main Beneficiary Management page.
- **Close** – Cancel and close the form, any changes will be lost.

5.2 View or Update Beneficiary Record

5.2.1 *Select Beneficiary*

Navigate to the Beneficiary Management page (see section5.1.1). A list of all Beneficiaries will be displayed.

Clicking on a Beneficiary name will display a record page for that Beneficiary, including a summary of all Redemptions.

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Redemption statements can be viewed from this page, see section 7.

5.2.2 Activate or Deactivate a Beneficiary

A Beneficiary may only be edited to change between the Active and Inactive states. To change the state, click on the appropriate button displayed in the top right-hand corner of the screen.

5.3 Troubleshooting & FAQs

5.3.1 Do I need to create a Redemption Account for each of my Beneficiaries?

The Registry is fully flexible for how you manage Redemptions. Whilst you may choose to have a separate Redemption Account for each Beneficiary, this is not necessary. You can equally use one Redemption account for all Redemptions.

5.3.2 What Beneficiary information is included on the redemption statement?

The following information is included on the redemption statement:

- Beneficiary name
- Beneficiary location
- Beneficiary country

See section 7.

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6 Redemption Requests

6.1 Pre-requisites

When redeeming certificates, it is a requirement that the Account Code of the intended receiving account be known. Account codes are verified to ensure that they are valid. A redemption may only be processed into a Redemption Account owned by the initiating Participant.

A Beneficiary must be assigned to a redemption and must be set up before creating the redemption request

6.2 Process Overview

Creating a redemption request is a multi-step process, all actioned within the Participant organisation. It is not necessary for the recipient to confirm a transfer.

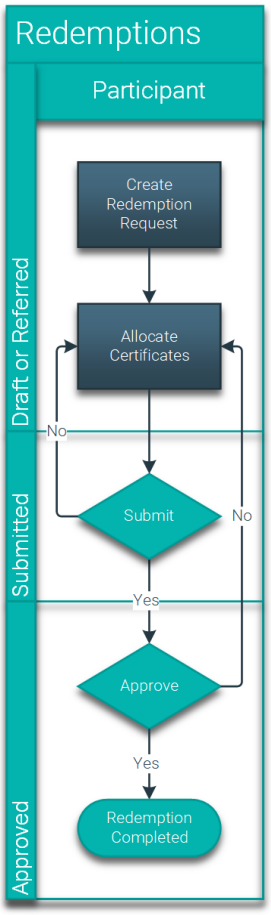

Figure 2 Redemption Process

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Processing of a redemption moves through three primary states, *Draft*, *Submitted* and *Approved*. A *Submitted* redemption request can be *Referred* back to the *Draft* stage.

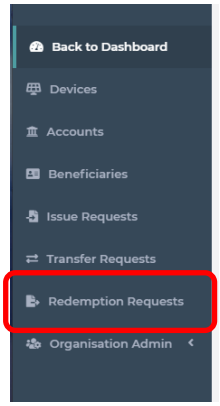
A redemption request that has not been *Approved* can be deleted.

A single user with appropriate permissions can process a redemption. Alternatively, a different user may approve a submitted redemption. If required, permissions can be set so that different users submit and approve redemptions.

6.3 Redeem Certificates

6.3.1 Navigate to Redemption Requests

On the left-hand navigation column, click **Transfer Requests**.



6.3.2 Click on Create Redemption

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

6.3.3 Enter Redemption Details

Enter the details relating to the redemption request you wish to create.

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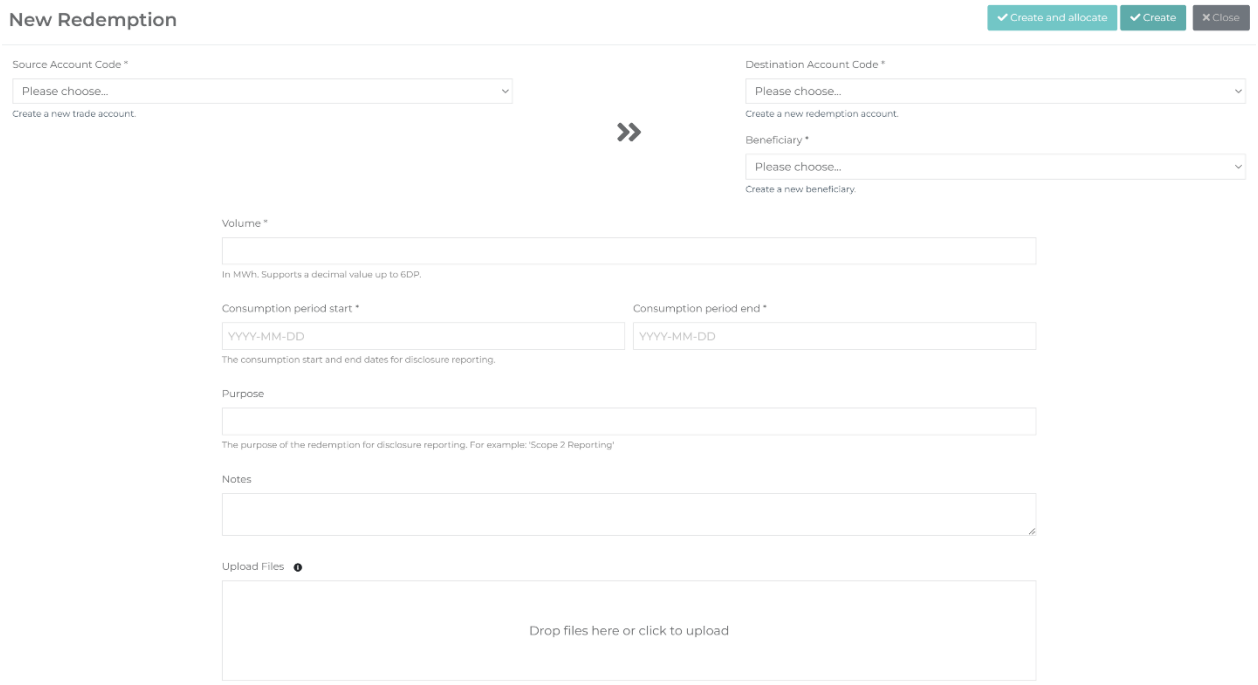

The following table describes the data fields on this form:

Field	Description
Source account code	The Trade account from which the certificates you wish to redeem are located in.
Redemption account code	The Redemption account which you wish to redeem to.
Beneficiary	The beneficiary / end-user you wish this redemption to be made against.
Volume	The total number of I-REC certificates you wish to redeem in MWh Any sub-MWh volume can be recorded as well using six decimal places to allow recoding volume to the Wh level. Volume will be recorded as: ○ '1.000000' = 1MWh ○ '0.001000' = 1kWh ○ '0.000001' = 1Wh
Consumption period start/end	The reporting period you wish to be printed on the redemption statement.
Purpose	The purpose of the redemption you wish to be printed on the redemption statement.

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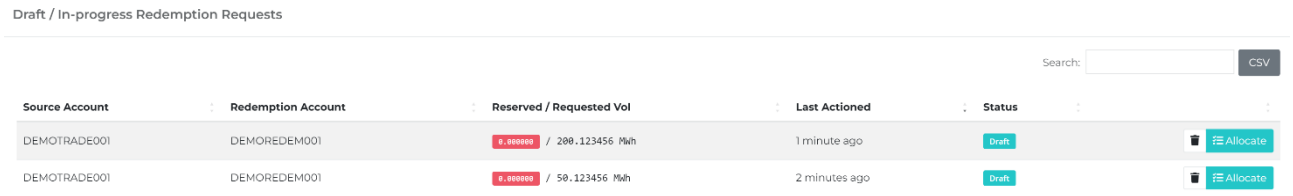
Field	Description
Notes	Any notes you wish to add to the redemption. These will not be printed on the redemption statement.
Upload Files	Any files that are associated with the redemption.

Once you have entered these details there are three options to choose from:

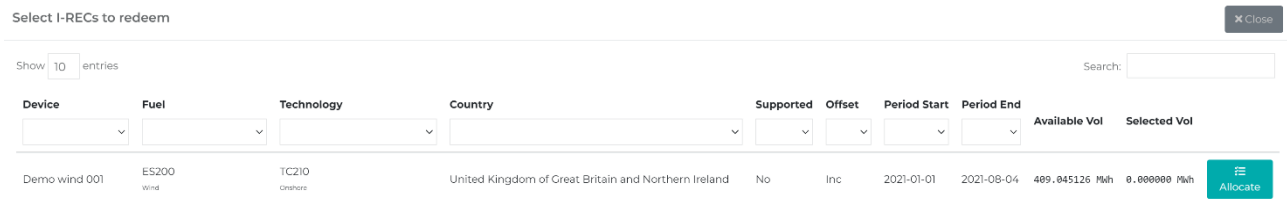
- **Create and allocate** – This will save the redemption request and open the screen for allocating certificates to the redemption.
- **Create** – This will save the redemption request and return to the previous page.
- **Close** – Cancel and close the form, any changes will be lost.

6.3.4 Allocate Certificates to Redemption Request

The screen for allocating certificates to a redemption is accessed either directly from the **Create and allocate** button previously described or by selecting the appropriate **Allocate** button on the list of draft redemption requests.



A list of available certificates from the selected source account will be then displayed.



To allocate certificates from one of the rows to a redemption, click the **Allocate** button on the right-hand side of that row.

It is possible to select certificates from any number of rows up to the total volume specified for the redemption.

A pop-up box will appear with two values, **Available** and **To be Redeemed**.

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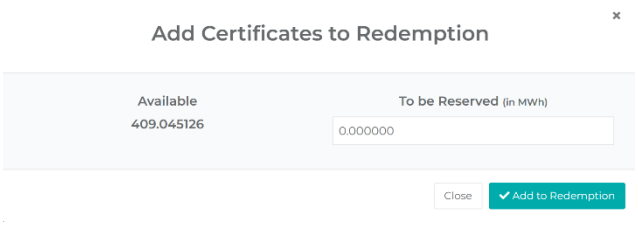
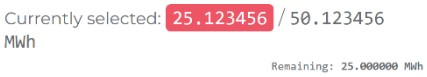


Enter the number of these certificates from this row that you wish to include add to the transfer request in the **To be Redeemed** text box.

Once you have entered these details there are two options to choose from:

- **Add to Redemption** – This adds the requested volume to the draft redemption request.
- **Close** – Cancel and close the form, any changes will be lost.

The total of certificates allocated against the number required for the redemption is displayed in the top tight-hand corner of the page.

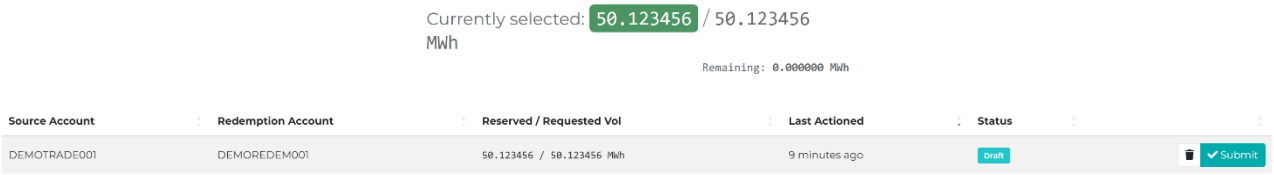


A redemption request can be kept as draft for as long as required.

Where certificates are allocated to a redemption request, they are not available to be added to other transfer or redemption requests.

6.3.5 Submit Redemption Request

Once the total required volume of certificates has been allocated, the request becomes available for submission. The selection display will be highlighted in green.



Click the **Submit** button at the right of the relevant row on the Redemption Requests list.

A confirmation form will be displayed with two options to choose from:

- **Yes, submit redemption** – This will submit the redemption request for approval.
- **Close** – Cancel and return.

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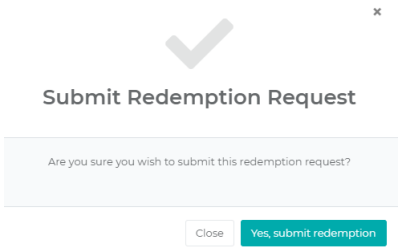
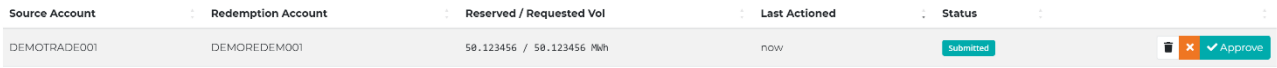


Once a Transfer Request has been Submitted it becomes available for Approval or Referral. Referring a Transfer Request sends it one step to the equivalent of the Draft status and allows the Transfer Request to be modified.

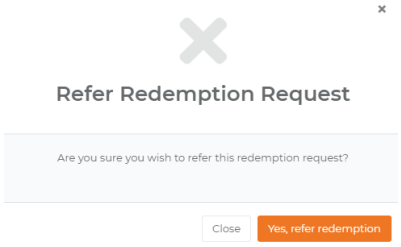
6.3.6 Refer a Redemption Request

To **Refer** a Transfer Request, click on the **X** button on the relevant row.



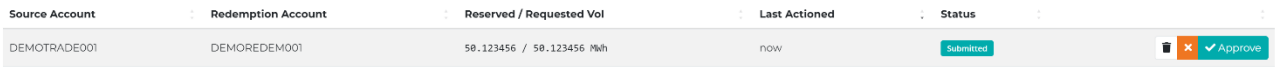
A confirmation form will be displayed with two options to choose from:

- **Yes, refer redemption** – This will refer the redemption request.
- **Close** – Cancel and return.



6.3.7 Approve a Redemption Request

To Approve a Transfer Request, click the **Approve** button for the request you wish to verify.



A summary of the Redemption Request and the selected certificates will be displayed with two options to choose from:

- **Go Back** – Cancel and return.
- **Redeem Now** – This will refer complete the transfer process.

Warning: This process cannot be undone so please check the details carefully before continuing.

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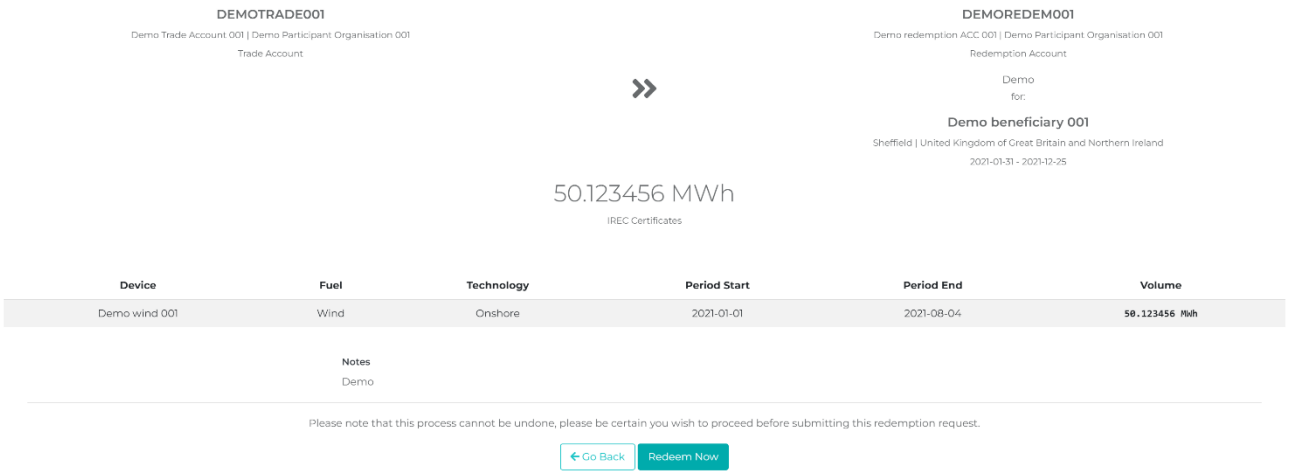

Once Approved, the completed Redemption Request will appear in the **Completed** Redemption Requests table.

Redemptions complete immediately and the certificates will be lodged in the redemption account.

Important: The redemption of an I-REC marks the end of its transferrable lifecycle. Once redeemed, an I-REC can no longer be traded therefore caution should be exercised when making redemption requests as the process is irreversible.

A redemption statement will also be created to certify the redemption request, this can be accessed either by navigating to the redemption account within the Account Management functions, or by navigating to the Beneficiary in the Beneficiaries function, see section 7.

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7 Redemption Statements

Redemption Statements provide evidence that a given volume of electricity has been generated from renewable sources.

Redemption Statements produced by the Registry are the only accepted form of evidence of assignment of the attributes contained within certificates to an end-user.

7.1 Generate Redemption Statement

Statements can only be viewed once a Redemption Request has been completed, marking the end of the certificate's lifecycle.

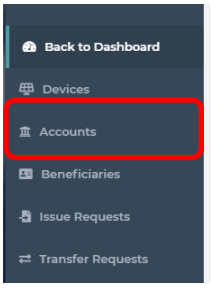
Redemption Statements are produced as PDF files. Embedded within the document is a QR Code and verification key which, when used together, provide secure access to the Registry for confirmation of the details contained within the Redemption Certificate.

Redemption Statements can be generated from both the Accounts and Beneficiaries screens.

7.1.1 Access via Accounts

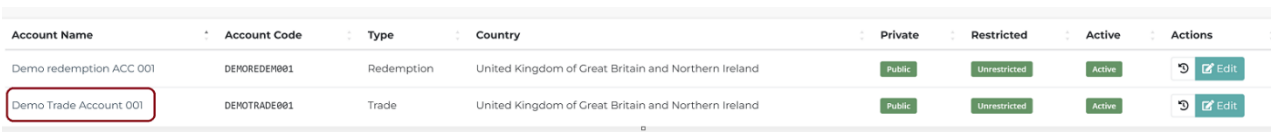
7.1.1.1 Navigate to Accounts

On the left-hand navigation column, click **Accounts**.



7.1.1.2 Select an Account

Click the Account Name link to view the account details and transactions. Redemption Statements can be accessed from both the source Trade Account and the destination Redemption Account.



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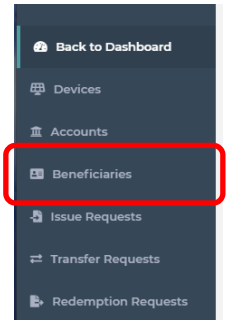
7.1.2 Access Via Beneficiaries

7.1.2.1 Navigate to Beneficiaries

On the left-hand navigation column, click **Beneficiaries**.

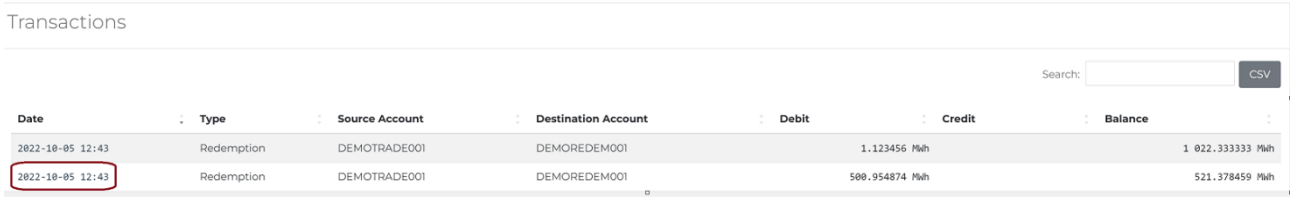


7.1.2.2 Select Beneficiary

Clicking on a Beneficiary name will display a record page for that Beneficiary, including a list of all Redemption transactions.

7.1.3 Select a Redemption Transaction

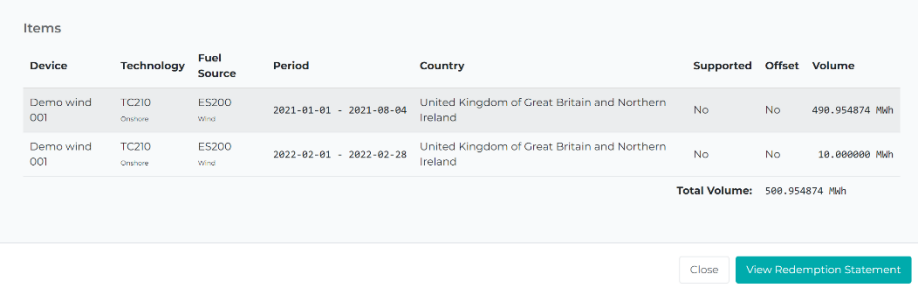
Select the transaction you wish to view the Redemption Statement for by clicking on the date link.



Details of the selected Redemption Statement will be displayed.

7.1.4 View Redemption Details

To view the statement, click **View Redemption Statement**.



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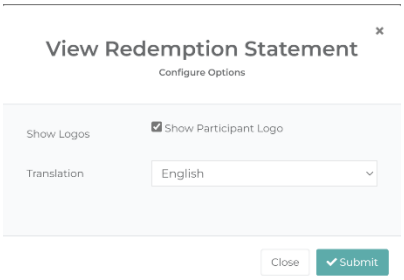
7.1.5 Choose Redemption Statement Options

A window will be displayed providing options for the Redemption Statement format.



The following table describes the option on this form:

Field	Description
Show Logos	Mark this box to show the logos for the Participant organisation.
Translation	The language in which the Redemption Statement will be presented.

7.1.6 Show Redemption Statement

Click **Submit** to show the Redemption Statement as a PDF. Depending on your browser settings this will either open a new browser tab or download the Redemption Statement.

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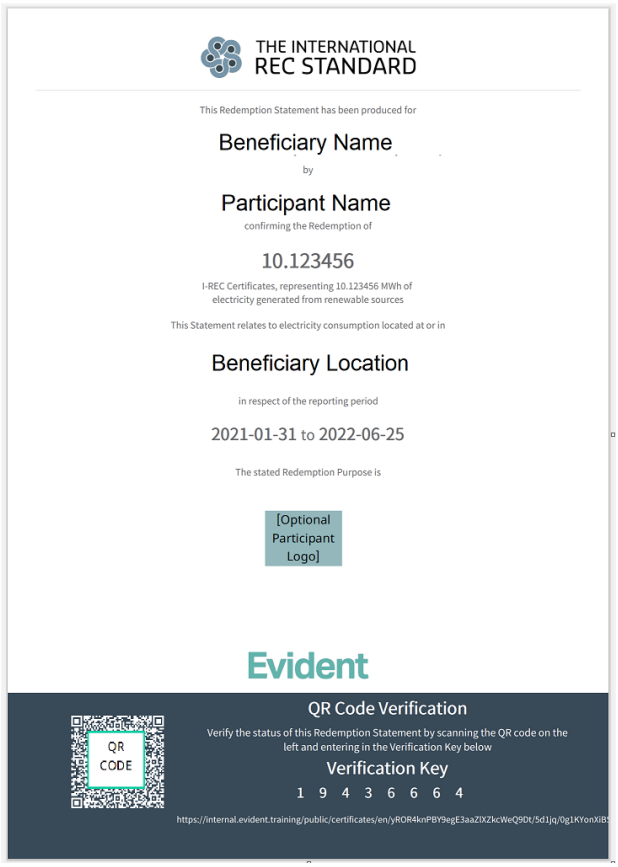
7.2 Sample Redemption Statement



THE INTERNATIONAL REC STANDARD

This Redemption Statement has been produced for

Beneficiary Name

by

Participant Name

confirming the Redemption of

10.123456

I-REC Certificates, representing 10.123456 MWh of electricity generated from renewable sources

This Statement relates to electricity consumption located at or in

Beneficiary Location

in respect of the reporting period

2021-01-31 to 2022-06-25

The stated Redemption Purpose is

[Optional Participant Logo]

Evident

QR Code Verification

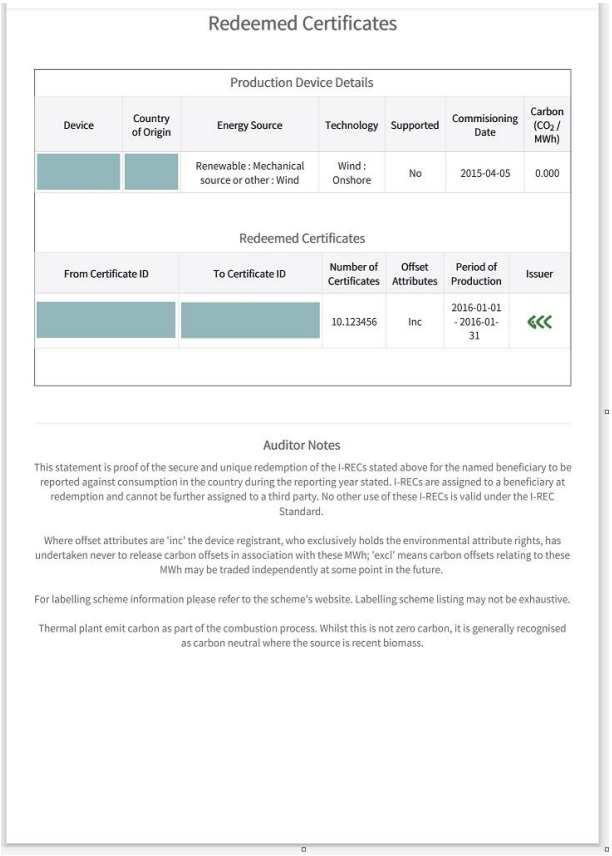
Verify the status of this Redemption Statement by scanning the QR code on the left and entering in the Verification Key below

QR CODE

Verification Key

1 9 4 3 6 6 6 4

https://internal.evident.training/public/certificates/en/yR0R4knPBY9egE3aaZIXZkcWeQ9Dt/5d1jq/0g1KYonXiB



Redeemed Certificates

Production Device Details

Device	Country of Origin	Energy Source	Technology	Supported	Commisioning Date	Carbon (CO_2 / MWh)
		Renewable : Mechanical source or other : Wind	Wind : Onshore	No	2015-04-05	0.000

Redeemed Certificates

From Certificate ID	To Certificate ID	Number of Certificates	Offset Attributes	Period of Production	Issuer
		10.123456	Inc	2016-01-01 - 2016-01-31	

Auditor Notes

This statement is proof of the secure and unique redemption of the I-RECs stated above for the named beneficiary to be reported against consumption in the country during the reporting year stated. I-RECs are assigned to a beneficiary at redemption and cannot be further assigned to a third party. No other use of these I-RECs is valid under the I-REC Standard.

Where offset attributes are 'inc' the device registrant, who exclusively holds the environmental attribute rights, has undertaken never to release carbon offsets in association with these MWh; 'excl' means carbon offsets relating to these MWh may be traded independently at some point in the future.

For labelling scheme information please refer to the scheme's website. Labelling scheme listing may not be exhaustive.

Thermal plant emit carbon as part of the combustion process. Whilst this is not zero carbon, it is generally recognised as carbon neutral where the source is recent biomass.

The Redemption Statement includes a QR code and URL for verification purposes. You can use this to verify the authenticity of any Redemption Statement. See section 7.3.

7.3 Verifying a Redemption Statement

To verify a printed or electronic Redemption Statement, navigate to the URL on the Redemption Statement by either scanning the QR Code with a mobile device or entering the displayed link in a web browser. The link is clickable in most PDF viewers.

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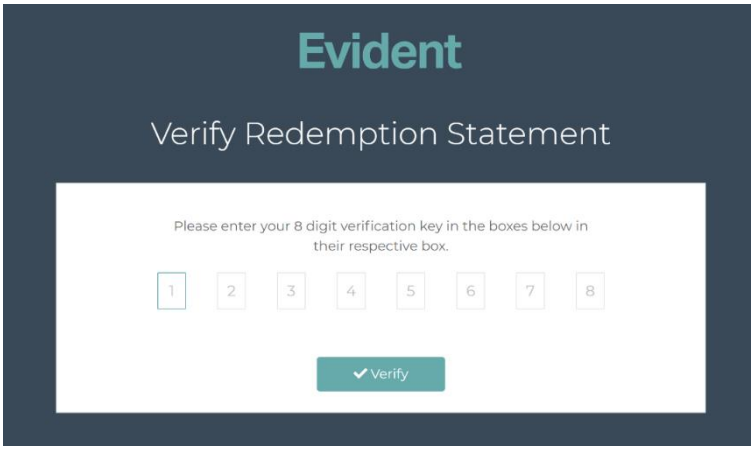

Enter the verification key as displayed on the Redemption Statement.

On successful verification, you will be presented with detailed information about the Redemption Statement including a link to the production device in the Evident registry.

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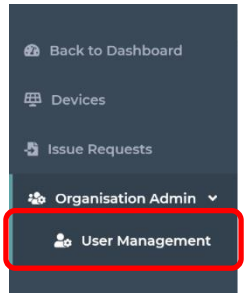
8 Managing Users

8.1 Create a New User

8.1.1 Navigate to User Management

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



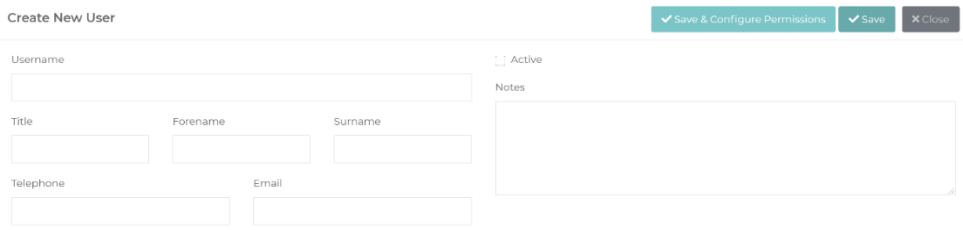
8.1.2 Select "Create New User"

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

8.1.3 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".

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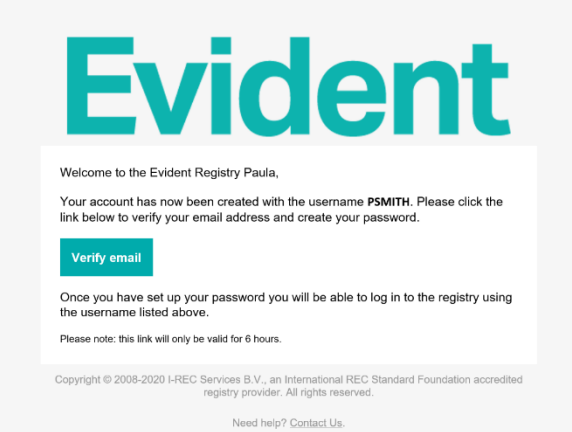
Field	Description
Title	The title of the user.
Forename	The forename of the user.
Surname	The surname of the user.
Telephone	A contact number for the user.
Email	The user's email address. This must be a valid email address so the newly created user can verify their account.
Active	Whether or not the 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 8.2).
- **Save** – This will save the user record with default permissions.
- **Close** – Cancel and close the form, any changes will be lost.

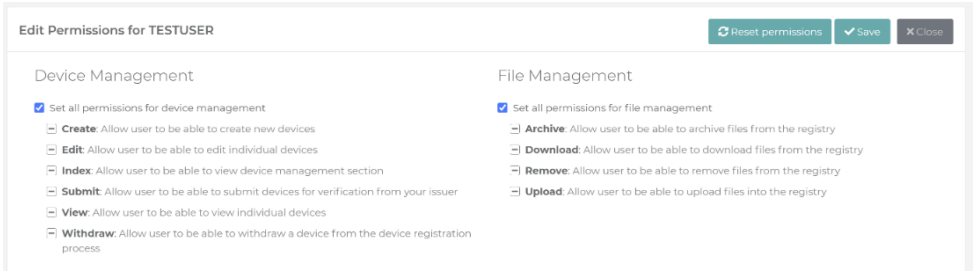
The new user will receive an email asking them to verify their account by creating a password. New users will not be able to access the Registry until they have verified their account.



8.2 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 10 for further details). You can select or deselect a permission by clicking the box to the left of each option.

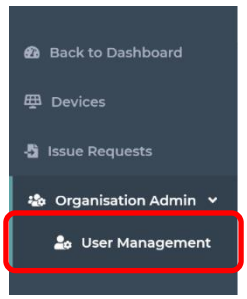
There are three options to choose from:

- **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.

8.3 Edit a User

8.3.1 Navigate to User Management

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



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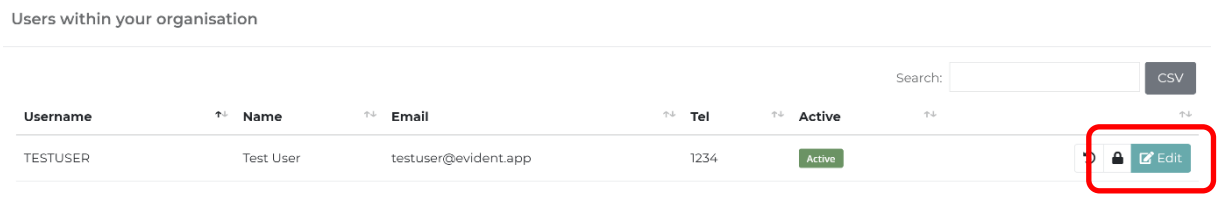
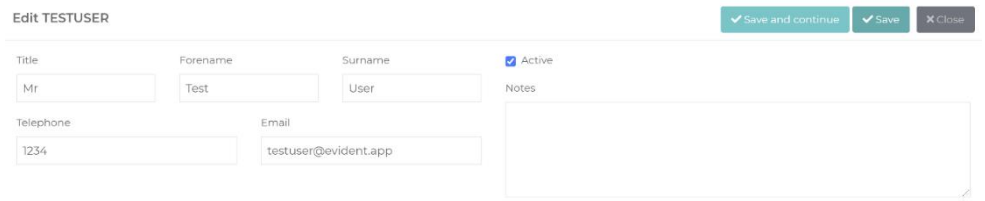
8.3.2 *Edit User Details*

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



8.3.3 *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.
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.

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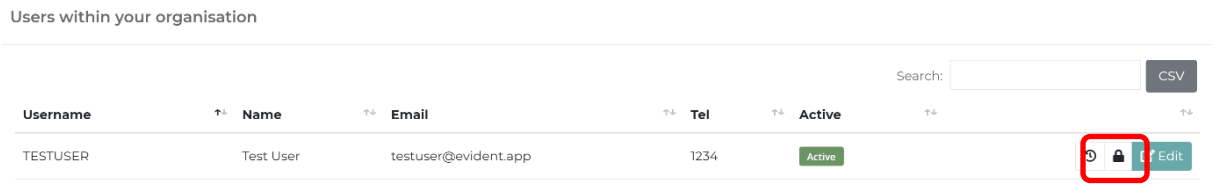
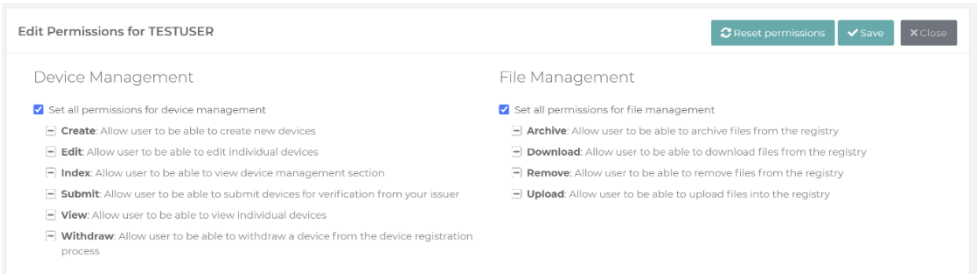
8.4 Update User Permissions

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 Participant, they will automatically inherit the default permissions for Participants.



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 10 for further details). You can select or 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.

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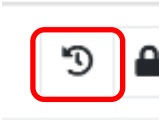
9 Record History

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.



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10 Permissions

10.1 Account Management

Permission	Description
Account Management GLOBAL	Grants permission for all below permissions.
Account Management INDEX	Grants permission to view the account management functions and see accounts.
Account Management CREATE	Grants user the ability to create new accounts.
Account Management VIEW	Allows the user to view individual accounts.
Account Management EDIT	Allows the user to edit accounts.
Account Management DELETE	Allows the user to disable accounts.
Account Management TRANSACTIONS	Allows the user to see all transactions associated with a specific account.
Account Management ITEMS	Allows the user to view all current account holdings.
Account Management BALANCE	Allows the user to view the current balance for a specific account.

10.2 Transfers

Permission	Description
Transfer Request GLOBAL	Grants permission for all below permissions.
Transfer Request INDEX	Grants permission to view the transfer request functions.
Transfer Request CREATE	Grants user the ability to create transfer requests.
Transfer Request EDIT	Grants user the ability to edit individual transfer requests.
Transfer Request ALLOCATE	Grants user the ability to allocate volumes to a transfer request.
Transfer Request VERIFY	Grants user the ability to verify a transfer request.

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Permission	Description
Transfer Request DELETE	Grants user the ability to delete a transfer request.

10.3 Beneficiaries

Permission	Description
Beneficiary Management GLOBAL	Grants permission for all below permissions.
Beneficiary Management INDEX	Grants permission to view the beneficiary functions.
Beneficiary Management CREATE	Grants user the ability to create new beneficiaries.
Beneficiary Management VIEW	Allows the user to view beneficiaries.
Beneficiary Management EDIT	Allows the user to edit beneficiaries.
Beneficiary Management TRANSACTIONS	Allows the user to see all transactions associated with a specific beneficiary.
Beneficiary Management BALANCE	Allows the user to view the current balance for a specific beneficiary.

10.4 Redemption Requests

Permission	Description
Redemption Request INDEX	Grants permission to view the redemption request functions.
Redemption Request CREATE	Grants user the ability to create redemption requests.
Redemption Request EDIT	Grants user the ability to edit a redemption request.
Redemption Request ALLOCATE	Grants user the ability to allocate volumes to a redemption request.
Redemption Request VERIFY	Grants user the ability to verify a redemption request.
Redemption Request DELETE	Grants user the ability to delete a redemption request.

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10.5 Redemption Statements

Permission	Description
Account Management STATEMENTS	Grants permission to view redemption statements for their redemption accounts.
Beneficiary Management STATEMENTS	Grants permission to view redemption statements for their beneficiary's redemption accounts.

10.6 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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