

Evident.

I-REC Registry User Guide

UG-04: Participant

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1 Becoming a Participant

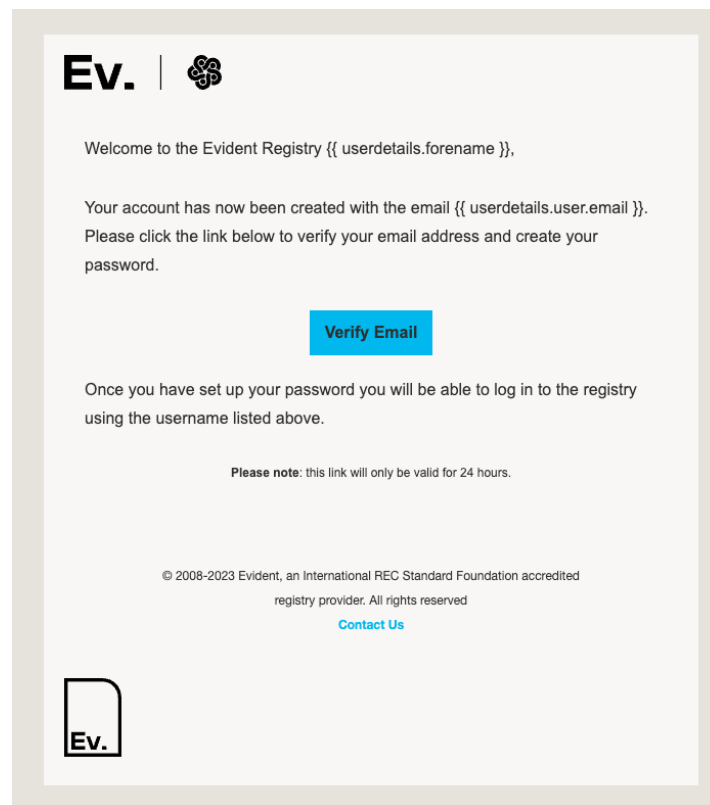
To become a Participant and trade or redeem I-REC certificates, it is first necessary to have a contract with Evident, who provides global Registry services for Participants.

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.

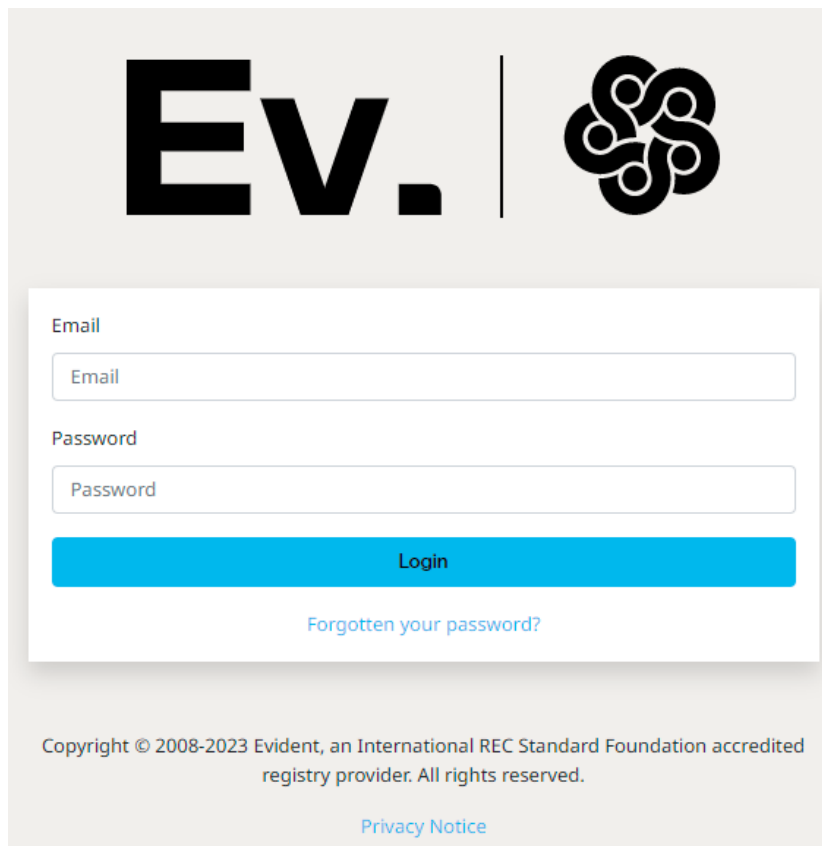


2 Access to the Registry

2.1 Login to the Registry

The Registry can be accessed at <https://evident.app>.

Please login to the Registry using your email address and password.



The screenshot shows the Evident login interface. At the top, the 'Ev.' logo is on the left and a circular icon with four interlocking loops is on the right. Below the logos is a white login box. Inside the box, there are two input fields: 'Email' and 'Password'. Below these fields is a blue 'Login' button. Under the button is a link that says 'Forgotten your password?'. At the bottom of the page, there is a copyright notice: 'Copyright © 2008-2023 Evident, an International REC Standard Foundation accredited registry provider. All rights reserved.' and a link for 'Privacy Notice'.

If you have forgotten your access details or password, please click **"Forgotten your password?"**.



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 and Platform Operators. 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 and Platform Operators. 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).

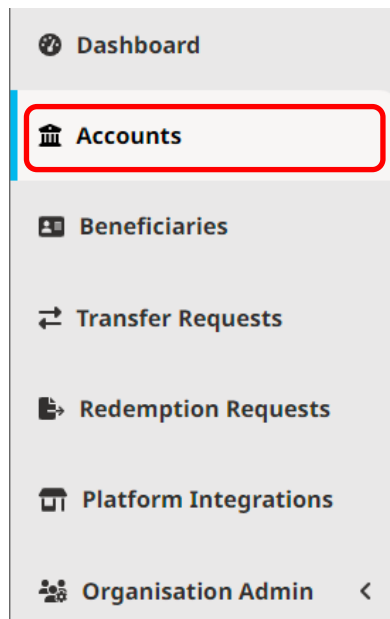
A single Redemption Account can be used for multiple Beneficiaries.



3.2 Create an Account

3.2.1 Navigate to Accounts

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



3.2.2 Click on “Create New Account”

In the top right corner, click the **Create New Account** button.

+ Create New Account

3.2.3 Enter Account Details

Enter the information relating to the Account.

Create Account

Name *

Account Type *

Please choose...

Country *

☐ Private

☐ Restricted

☒ Active

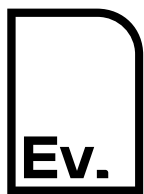
Notes

Upload Files

Drop files here or click here to upload.

✓ Save

✕ Close



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The following table describes the data fields on this form:

| Field | Description |
|---------------------|---|
| 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 *Note: Account Codes are now automatically generated upon Account creation. 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:

- **Save** – 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.





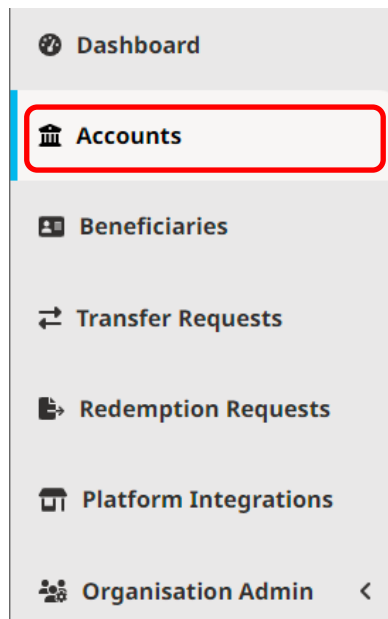
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3.3 Edit an Account

3.3.1 Navigate to Accounts

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



3.4 Select an Account

Click the Edit button to view the account details.

| Account Name | Account Code | Account Type | Balance | Country | Private | Restricted | Active | Actions |
|---------------------------|--------------|--------------------|--------------------|-------------------------------|---------|--------------|--------|------------------|
| Demo Trade Account 1 | T1NSCSUE | Trade Account | 21,088,871,211 MWh | United Kingdom of Great Br... | Public | Unrestricted | Active | Summary Holdings |
| Demo Redemption Account 1 | RBHKL453 | Redemption Account | 100,000,000 MWh | United Kingdom of Great Br... | Public | Unrestricted | Active | Summary Holdings |



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3.4.1 Edit Account Details

Enter the information relating to the Account.

Edit Account T1NSCSUE

✓ Save × Close

Account Code *

T1NSCSUE

Account Organisation

PARTICIPANTORG2

Name *

Demo Trade Account 1

Account Type *

trade

Country *

GB - United Kingdom of Great Britain and Northern Ireland × ▼

☐ Private

☐ Restricted

☒ Active

Notes

Account Files

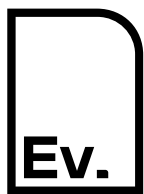
There are currently no files associated with this.

Upload Files ⓘ

Drop files here or click here to upload.

The following table describes the data fields on this form:

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

- **Save** – 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 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.



4 Transfers

4.1 Prerequisites

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.

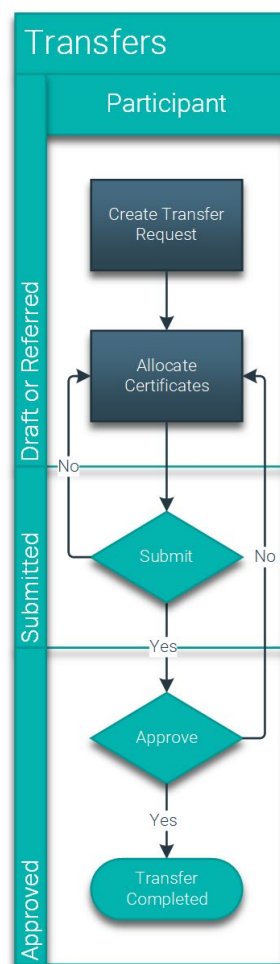


Figure 1 Transfer Process

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.



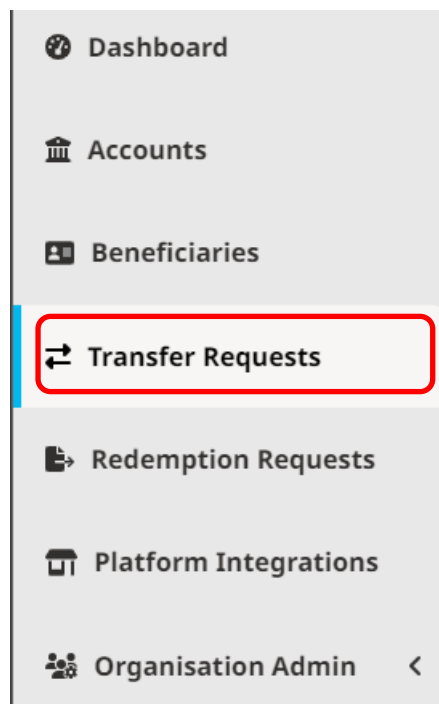
A Transfer Request that has not been *Approved* can be deleted.

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 navigation column, click **Transfer Requests**.



4.3.2 Click on Create Transfer

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



4.3.3 Enter Transfer Details

Enter the details relating to the Transfer Request you wish to create.



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Create New Transfer

✓ Save & Allocate

✓ Save

✕ Close

Source Account Code *

T1NSCSUE - Demo Trade Account 1

Create a new trade account

>>

Destination Account Code *

T659NQ02

Volume *

10.987654

✓

MWh

Notes

Transfer Files

There are currently no files associated with this.

Upload Files

Drop files here or click here to upload.

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 total number of I-REC certificates you wish to transfer in MWh. Any sub-MWh volume can be recorded as well, using six decimal places to allow recording volume to the Wh level. Volume will be recorded as: <ul style="list-style-type: none">○ '1.000000' = 1MWh○ '0.001000' = 1kWh○ '0.000001' = 1Wh |
| 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:



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- **Save and Allocate** – This will save the Transfer Request and open the screen for allocating certificates to the transfer.
- **Save** – 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 **Save and Allocate** button previously described, or by selecting the appropriate **Allocate** button on the list of draft Transfer Requests.

| Source Account | Destination Account | Reserved / Requested Volume | Last Actioned | Status | Actions |
|----------------|---------------------|-----------------------------|----------------|--------|----------|
| T1NSCSUE | TFLIID3P | 0.000000 / 10.987654 MWh | 14 seconds ago | Draft | Allocate |

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

| Select I-RECS to transfer | | | | | | | | | | Close |
|---------------------------|-------|------------------------|--|-----------|--------|--------------|------------|----------------|--------------|----------|
| Device | Fuel | Technology | Country | Supported | Offset | Period Start | Period End | Available Vol | Selected Vol | |
| TC150 test device | Solar | Solar Thermal Conce... | United Kingdom of Great Britain and Northern Ireland | Yes | Inc | 2020-01-01 | 2020-01-31 | 629.676567 MWh | 0.000000 MWh | Allocate |
| TC140 test device | Solar | PV Aggregated | United Kingdom of Great Britain and Northern Ireland | Yes | Inc | 2020-01-01 | 2020-01-31 | 100.000000 MWh | 0.000000 MWh | Allocate |

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

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



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

Allocate

Select the volume of certificates to be reserved. If allocating granular certificates (i.e. a decimal amount), please type out the amount below and do not use the slider.

If you wish to remove an allocation, please set the value to 0 or click the unallocate button below.

Available

629.676567

To be Reserved

MWh

X Cancel

✓ Allocate

Enter the number of these certificates from this row you wish to add to the Transfer Request in the **To be Reserved** text box or drag the slider underneath the text box.

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

- **Allocate** – 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 right corner of the page.

Currently selected: 0.000000 / 10.987654 MWh
Remaining: 10.987654 MWh

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.



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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.

Currently selected: **10.987654** / 10.987654 MWh
Remaining: 0.000000 MWh

| Draft / In-progress Transfer Requests | | | | | | |
|---------------------------------------|---------------------|-----------------------------|----------------|--------|---------|-----|
| Search... | | | | | | CSV |
| Source Account | Destination Account | Reserved / Requested Volume | Last Actioned | Status | Actions | |
| T1NSCSUE | TFLIID3P | 10.987654 / 10.987654 MWh | 24 seconds ago | Draft | Submit | |

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:

- **Submit Transfer** – This will submit the Transfer Request for approval.
- **Close** – Cancel and return.

Input the total volume in the 'Confirm total volume' field to be able to submit the Transfer Request.

Submit Transfer

Transferring 10.987654 Certificates

Source account
T1NSCSUE
Trade Account

>>

Destination account
TFLIID3P

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|-----------------------------|--------------|------------|---------------|
| TC150 test device | Solar | Solar Thermal Concentrat... | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

Confirm total volume

The Confirm field is required

Submit Transfer

Close

Once a Transfer Request has been Submitted, it becomes available for Approval or Referral.



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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 yellow **X** button in the relevant row.

| Source Account | Destination Account | Reserved / Requested Volume | Last Actioned | Status | Actions |
|----------------|---------------------|-----------------------------|---------------|-----------|---------|
| T1NSCSUE | TFLIID3P | 10.987654 / 10.987654 MWh | 1 seconds ago | Submitted | Approve |

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

- **Refer Transfer** – This will refer the Transfer Request.
- **Close** – Cancel and return.

Refer Transfer ×

Source account
T1NSCSUE
Trade Account

Transferring 10.987654 Certificates
»

Destination account
TFLIID3P

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|-----------------------------|--------------|------------|---------------|
| TC150 test device | Solar | Solar Thermal Concentrat... | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

↓ Refer Transfer

× Close

4.3.7 Approve a Transfer Request

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

| Source Account | Destination Account | Reserved / Requested Volume | Last Actioned | Status | Actions |
|----------------|---------------------|-----------------------------|---------------|-----------|---------|
| T1NSCSUE | TFLIID3P | 10.987654 / 10.987654 MWh | 1 seconds ago | Submitted | Approve |

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

- **Close** – Cancel and return.
- **Approve Transfer** – This will complete the transfer process.



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Input the total volume in the 'Confirm total volume' field to be able to approve the Transfer request.

Approve Transfer

x

Transferring 10.987654 Certificates

>>

Source account
T1NSCSUE
Trade Account

Destination account
TFLIID3P

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|-----------------------------|--------------|------------|---------------|
| TC150 test device | Solar | Solar Thermal Concentrat... | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

Confirm total volume

Please note that this process cannot be undone, please be certain you wish to approve this transaction before proceeding.

Approve Transfer

Close

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.



5 Archive and Cancel

Evident provides two central accounts where you can transfer any I-REC(E)s you no longer wish to retain for sale or redemption. Each of these options is described below.

Both accounts are managed by Evident Ev Limited as Registry Operator and are visible as "Trade Accounts" in the Registry.

5.1 Archive Certificates

To archive certificates, the Destination Account Code field shall be set to '**ARCHIVEDCERTS**'.

You will retain ownership of I-RECs transferred into this account and may restore them by contacting the Evident helpdesk – helpdesk@evident.global. Restoration will incur fees as set out in the relevant published tariff.

5.2 Cancel Certificates

The primary distinction between cancelling certificates and transferring certificates also lies in the selection of the Destination Account Code. To cancel certificates, the Destination Account Code field shall be set to '**CANCELLEDCERTS**'.



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Create Transfer

✓ Save & Allocate

✓ Save

✕ Close

Source Account Code *

Please choose...

▼

[Create a new trade account](#)

>>

Destination Account Code *

CANCELLEDCERTS

✓

Volume *

MWh

Notes

Transfer Files

There are currently no files associated with this.

Upload Files

●

Drop files here or click to upload.

Transfers to this account are irreversible. I-REC(E)s transferred into this account are deemed cancelled and permanently removed from the Registry.



6 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.

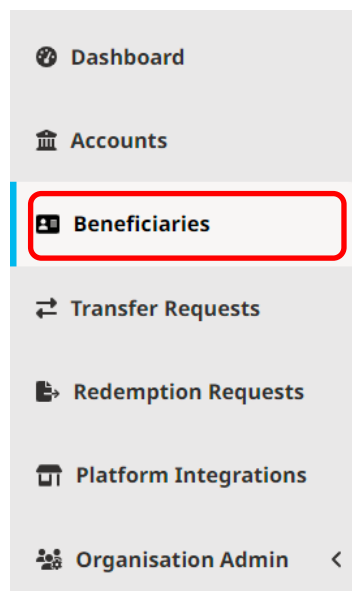
All Redemptions require a Beneficiary to be assigned. Beneficiary details will be presented on any redemption statement made against said Beneficiary. See section 7.

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.

6.1 Create a Beneficiary

6.1.1 Navigate to Beneficiaries

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



6.1.2 Click on “Add New Beneficiary”

In the top right corner, click the **Create New Beneficiary** button.

+ Create New Beneficiary



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6.1.3 Enter Beneficiary Details

Enter the details for the Beneficiary you wish to create.

Create New Beneficiary

✓ Save

✕ Close

Name *

Country *

Location *

☒ Active

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 wish 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**.

6.1.4 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:

- **Save** – 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.



6.2 View or Update Beneficiary Record

6.2.1 Select Beneficiary

Navigate to the Beneficiary Management page (see section 5.1.1). 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.

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

6.2.2 Activate or Deactivate a Beneficiary

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



6.3 Troubleshooting & FAQs

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

The Registry is fully flexible about 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.

6.3.2 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.



7 Redemption Requests

7.1 Prerequisites

When redeeming certificates, it is a requirement that the Account Code of the intended receiving account is 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.

7.2 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.

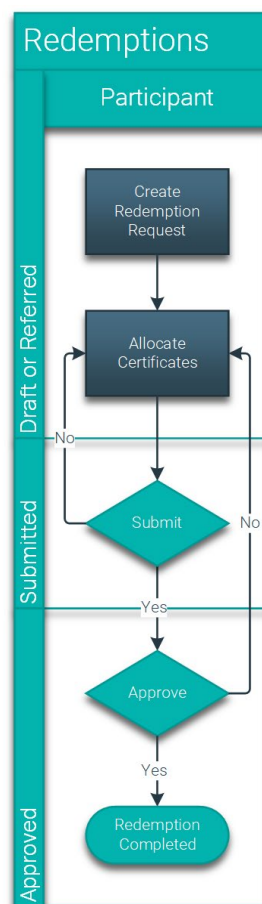


Figure 2 Redemption Process



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.

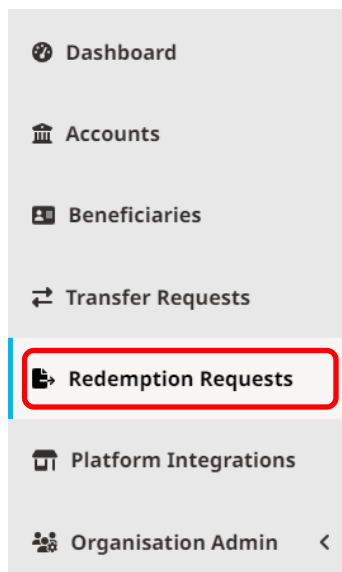
A Redemption Request that has not been *Approved* can be deleted.

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.

7.3 Redeem Certificates

7.3.1 Navigate to Redemption Requests

On the left navigation column, click **Redemption Requests**.



7.3.2 Click on Create Redemption

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



7.3.3 Enter Redemption Details

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



Evident . I-REC Code for Electricity

UG-04: Participant

Create New Redemption

✓ Save & Allocate

✓ Save

✕ Close

Source Account Code *

Please choose...

Create a new trade account

>>

Destination Account Code *

Please choose...

Create a new redemption account

Beneficiary *

Please choose...

Create a new beneficiary

Volume *

MWh

Consumption period start *

☐ No date selected

Consumption period end *

☐ No date selected

Purpose *

The purpose of the redemption for disclosure reporting. For example: 'Scope 2 Reporting'

Notes

Redemption Files

There are currently no files associated with this.

Upload Files

Drop files here or click here to upload.

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 recording volume to the Wh level. Volume will be recorded as: <ul style="list-style-type: none">○ '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. |



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| Field | Description |
|---------------------|--|
| Purpose | The purpose of the redemption you wish to be printed on the redemption statement. |
| Notes | Any notes you wish to add to the redemption. <i><u>Note: These will not be printed on the redemption statement.</u></i> |
| Upload Files | Any files that are associated with the redemption. |

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


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

7.3.4 Allocate Certificates to Redemption Request

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

| Draft / In-progress Redemption Requests | | | | | | | |
|---|--|-----------------------------|----------------|--------|---|---|--|
| Search... | | | | | | | CSV |
| Source Account | Redemption Account | Reserved / Requested Volume | Last Actioned | Status | Actions | | |
| T1NSCSUE |  RBHKL453 | 0.000000 / 10.987654 MWh | 19 seconds ago | Draft |  |  |  Allocate |
| T1NSCSUE |  RBHKL453 | 0.000000 / 1.999876 MWh | 2 days ago | Draft |  |  |  Allocate |

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

| Select I-RECS to redeem | | | | | | | | | | × Close |
|-------------------------|-------|---------------|--|-----------|--------|--------------|------------|----------------|--------------|--|
| Device | Fuel | Technology | Country | Supported | Offset | Period Start | Period End | Available Vol | Selected Vol | |
| TC140 test devi... | Solar | PV Aggregated | United Kingdom of Great Britain and Northern Ireland | Yes | Inc | 2020-01-01 | 2020-01-31 | 100.000000 MWh | 0.000000 MWh |  Allocate |

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



Evident . I-REC Code for Electricity

UG-04: Participant

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 Reserved**.

Enter the number of these certificates from this row that you wish to 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:

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

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

Currently selected: 5.987654 / 10.987654 MWh
Remaining: 5.000000 MWh

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.



Evident . I-REC Code for Electricity

UG-04: Participant

7.3.5 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.

Currently selected: **10.987654** / 10.987654 MWh
Remaining: 0.000000 MWh

| Draft / In-progress Redemption Requests | | | | | | |
|---|--------------------|-----------------------------|---------------|--------|---------|-----|
| Search... | | | | | | CSV |
| Source Account | Redemption Account | Reserved / Requested Volume | Last Actioned | Status | Actions | |
| T1NSCSUE | RBHKL453 | 10.987654 / 10.987654 MWh | 5 minutes ago | Draft | | |

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:

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

Submit Redemption

×

Redeeming 10.987654 Certificates

Source account
T1NSCSUE
Trade Account



Destination account
RBHKL453
for:

ben-1-active
Sheffield | United Kingdom of Great Britain and
Northern Ireland
Scope 2 Reporting
2022-03-01 - 2022-03-31

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|---------------|--------------|------------|---------------|
| TC140 test device | Solar | PV Aggregated | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

Confirm total volume

↑ Submit Redemption

× Close

Input the total volume in the 'Confirm total volume' field to be able to submit the Redemption Request. Once a Redemption Request has been Submitted, it becomes available for Approval or



Evident . I-REC Code for Electricity

UG-04: Participant

Referral. Referring a Redemption Request sends it one step to the equivalent of the Draft status and allows the Redemption Request to be modified.

7.3.6 Refer a Redemption Request

| Draft / In-progress Redemption Requests | | | | | | |
|---|--------------------|-----------------------------|---------------|-----------|---------|-----|
| Search... | | | | | | CSV |
| Source Account | Redemption Account | Reserved / Requested Volume | Last Actioned | Status | Actions | |
| T1NSCSUE | RBHKL453 | 10.987654 / 10.987654 MWh | 9 seconds ago | Submitted | Approve | |

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

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

- **Refer Redemption** – This will refer the redemption request.
- **Close** – Cancel and return.

Refer Redemption ×

Source account

T1NSCSUE

Trade Account

>>

Destination account

RBHKL453

for:

ben-1-active

Sheffield | United Kingdom of Great Britain and Northern Ireland

Scope 2 Reporting

2022-03-01 - 2022-03-31

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|---------------|--------------|------------|---------------|
| TC140 test device | Solar | PV Aggregated | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

↓ Refer Redemption

× Close



Evident . I-REC Code for Electricity

UG-04: Participant

7.3.7 Approve a Redemption Request

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

| Draft / In-progress Redemption Requests | | | | | |
|---|--------------------|-----------------------------|---------------|-----------|---------|
| Search... | | | | | CSV |
| Source Account | Redemption Account | Reserved / Requested Volume | Last Actioned | Status | Actions |
| T1NSCSUE | RBHKL453 | 10.987654 / 10.987654 MWh | 9 seconds ago | Submitted | |

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

- **Close** – Cancel and return.
- **Approve Redemption** – This will complete the transfer process.

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

Approve Redemption

Source account

T1NSCSUE

Trade Account

Redeeming 10.987654 Certificates

Destination account

RBHKL453

for:

ben-1-active

Sheffield | United Kingdom of Great Britain and Northern Ireland

Scope 2 Reporting

2022-03-01 - 2022-03-31

Certificate sources

| Device | Fuel | Technology | Period Start | Period End | Volume |
|-------------------|-------|---------------|--------------|------------|---------------|
| TC140 test device | Solar | PV Aggregated | 2020-01-01 | 2020-01-31 | 10.987654 MWh |

Confirm total volume

Please note that this process cannot be undone, please be certain you wish to approve this transaction before proceeding.

Approve Redemption

Close

Input the total volume in the Confirm total volume field to be able to approve the Redemption Request. Once Approved, the completed Redemption Request will appear in the **Completed** Redemption Requests table.



Evident . I-REC Code for Electricity

UG-04: Participant

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. It 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.



8 Evident Impact Programme

The Evident Impact Programme offers an alternative way to utilise I-REC(E)s, transforming their redemption into a direct mechanism for advancing social and environmental goals (see <https://evident.global/ev-impact-programme>). Redemptions to the Evident Impact Programme are charged at the standard fee rate.

*In order to make a donation to the Evident Impact Programme, please select your chosen Beneficiary that starts with '**Evident Impact Programme:**' in the drop-down.*

The screenshot shows the 'Create New Redemption' form. At the top right are buttons for 'Save & Allocate', 'Save', and 'Close'. The form is divided into two main sections by a double arrow '»'. The left section contains 'Source Account Code *' (a dropdown menu), 'Volume *' (a text input with a 'MWh' unit selector), 'Consumption period start *' (a date picker with 'No date selected'), 'Consumption period end *' (a date picker with 'No date selected'), 'Purpose *' (a text input), 'Notes' (a text area), and 'Redemption Files' (a section stating 'There are currently no files associated with this.'). The right section contains 'Destination Account Code *' (a dropdown menu) and 'Beneficiary *' (a dropdown menu, which is highlighted with a red rectangle). Below the 'Beneficiary *' dropdown is a link that says 'Create a new beneficiary'. At the bottom of the form is an 'Upload Files' section with a large box and the text 'Drop files here or click here to upload.'



9 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 evidence of assignment of the attributes contained within certificates to an end-user.

9.1 Generate Redemption Statement

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

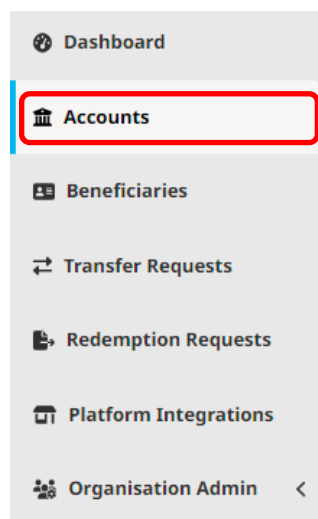
Redemption Statements are produced as PDF files. Embedded within the document is a QR Code and verification key which, when used together, provide secure access to the Registry for confirmation of the details contained within the Redemption Certificate.

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

9.1.1 Access via Accounts

9.1.1.1 Navigate to Accounts

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



9.1.1.2 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.



Evident . I-REC Code for Electricity

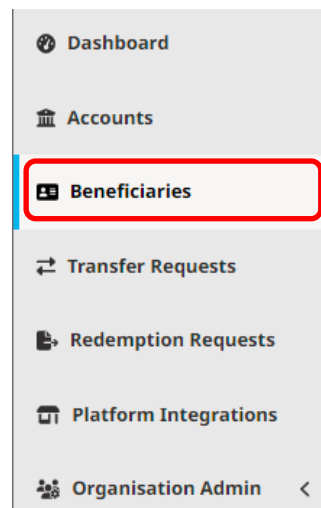
UG-04: Participant

| Accounts | | | | | | | | | |
|---------------------------|--------------|--------------------|------------------|-------------------------------|---------|--------------|--------|---------|---------------|
| Search... | | | | | | | | | CSV |
| Account Name | Account Code | Account Type | Balance | Country | Private | Restricted | Active | Actions | |
| Demo Trade Account 1 | T1NSCSUE | Trade Account | 20 778.883557... | United Kingdom of Great Br... | Public | Unrestricted | Active | Summary | Holdings Edit |
| Demo Redemption Account 1 | RBHKL453 | Redemption Account | 110.987654 MWh | United Kingdom of Great Br... | Public | Unrestricted | Active | Summary | Holdings Edit |

9.1.2 Access Via Beneficiaries

9.1.2.1 Navigate to Beneficiaries

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



9.1.2.2 Select Beneficiary

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

9.1.3 Select a Redemption Transaction

Select the transaction for which you wish to view the Redemption Statement by clicking on the corresponding Items button.

| Transactions | | | | | |
|------------------|------------|----------------|---------------------|-----------------|-------|
| Search... | | | | | CSV |
| Date | Type | Source Account | Destination Account | Volume Redeemed | |
| 2023-03-30 21:13 | Redemption | T1NSCSUE | RBHKL453 | 10.987654 MWh | Items |
| 2023-03-27 13:02 | Redemption | TFLIID3P | RDO464UR | 50.000000 MWh | Items |



Evident . I-REC Code for Electricity

UG-04: Participant

Details of the selected Redemption Statement will be displayed.

9.1.4 View Redemption Details

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

Items ×

Transaction ID: 01GWT2ECJX1NDJS06RMCRGCOST

redemption | 2023-03-30 09:13

| Device | Technology | Fuel Code | Period | Country | Supported | Offset | Volume |
|---------------------|-----------------------|---------------|--------------------------|--|-----------|--------|---------------|
| TC140 test devic... | PV Aggregated - TC140 | Solar - ES100 | 2020-01-01 - 2020-01-... | United Kingdom of Great Britain and Northern Ireland | Yes | Inc | 10.987654 MWh |
| | | | | | | | 10.987654 MWh |

Showing 1-1 of 1 rows

Page Size 10 First Prev 1 Next Last

[View Redemption Statement](#) × Close

9.1.5 Choose Redemption Statement Options

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

View Redemption Statement

Show Logos

☒ Show Participant Logo

Translation

English ▼

× Close ✓ Submit

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. |



Evident . I-REC Code for Electricity

UG-04: Participant

9.1.6 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.



Evident . I-REC Code for Electricity

UG-04: Participant

9.2 Sample Redemption Statement

**THE INTERNATIONAL
REC STANDARD**

This Redemption Statement has been produced for

BEN-1-ACTIVE

by

PARTICIPANTORG2

confirming the Redemption of

10.987654

I-REC Certificates, representing 10.987654 MWh of
electricity generated from renewable sources

This Statement relates to electricity consumption located at or in

Sheffield
United Kingdom of Great Britain and Northern Ireland

in respect of the reporting period

2022-03-01 to 2022-03-31

The stated Redemption Purpose is

Scope 2 Reporting

[Optional Participant
Logo]

Ev.

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

Redeemed Certificates

| Production Device Details | | | | | | |
|---------------------------|-------------------|---------------|---------------|-----------|--------------------|--------------------------------|
| Device | Country of Origin | Energy Source | Technology | Supported | Commissioning Date | Carbon (CO ₂ / MWh) |
| | | Solar | PV Aggregated | Yes | 2023-03-24 | 1.000000 |

Redeemed Certificates

| From Certificate ID | To Certificate ID | Number of Certificates | Offset Attributes | Period of Production | Issuer |
|---------------------|-------------------|------------------------|-------------------|-------------------------|------------|
| | | 10.987654 | | 2020-01-01 - 2020-01-31 | ISSUERORG1 |

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, either of which can be used to verify the authenticity of any Redemption Statement. See section 9.3.

9.3 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.



Evident . I-REC Code for Electricity UG-04: Participant

Ev. | 

Verify Redemption Statement

Please enter your 8 digit verification key in the boxes below in their respective box.

Verify

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.



**THE INTERNATIONAL
REC STANDARD**

Redemption Statement

This Redemption Statement has been validated against the Evident Registry.

This Redemption Statement has been produced for

BEN-1-ACTIVE

by

PARTICIPANTORG2



10 Platform Integrations

10.1 Introduction

Integrations / Platforms are third-party systems Participants can connect their organisations into, for additional functionality, technology, and processes not directly offered within the I-REC Registry.

A Platform is an organisation that offers one or more integrations directly into the I-REC Registry. An integration is offered by a Platform to allow users, such as Participants within the I-REC Registry, to connect their organisations into the third-party system.

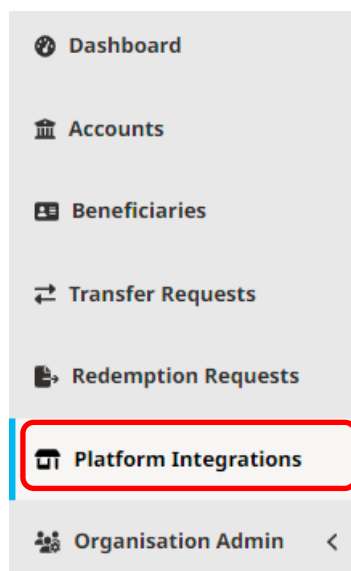
10.2 Prerequisites

An integration must be pre-approved by Evident before a Platform can offer it directly to end-users. The number of available integrations is expected to grow.

10.3 Setting up an Integration

10.3.1 Navigate to Platform Integrations

On the left navigation column, click **Platform Integrations**.





Evident . I-REC Code for Electricity

UG-04: Participant

10.3.2 View Integrations

Depending on the number of available organisations, you will see a list of approved integrations to choose from. To view an integration offered by a Platform, click **View Integrations**.

Platform Integrations

Platform Integrations

Platform Operator 001

Platform Operator 001 is a very ecofriendly company offering a system whereby users can trade and exchange their IREC certificates within it.

[View Integrations](#)

Platform Operator 002

Platform Operator 001 is a company offering read-only integrations aimed at participant users.

[View Integrations](#)

10.3.3 Enable Integration

To enable an integration, click **Enable Integration**.

Platform Operator 002

Platform Integrations / Platform Operator 002

Platform Operator 002 is a company offering marketplace integrations aimed at Participant users.

Company Address
<https://www.insertcompanyhere.com>

Marketplace Platform

Encumbrance Marketplace Not Enabled

+ Enable Integration

Description

Our I-REC marketplace connects buyers and sellers across 50 countries around the world.

Permissions Granted

2 Permissions

Account

View - Account

✓ Granted

Create - Account

✓ Granted

Global - Account

✗ Not granted

Balance - Account

✗ Not granted

Delete - Account

✗ Not granted

Edit - Account

✗ Not granted

History - Account

✗ Not granted

Items - Account

✗ Not granted

Statements - Account

✗ Not granted

Transactions - Account

✗ Not granted

It is possible to see what permissions are granted prior to enabling an integration in a dropdown list.



Evident . I-REC Code for Electricity

UG-04: Participant

10.3.4 Confirm Integration

Confirmation

×

Info: You are about to enable integration with Platform Operator 002.

This will enable data exchange between your account and the Platform Operator according to the permissions associated with the selected integration type. Are you sure you want to continue with the integration? Please confirm your decision below.

☐ I understand that I am granting information to a non-Evident company.

× Close

+ Enable Integration

A window will be displayed providing information about the data exchange, with a check box and two options to choose from:

- **Close** – Cancel and return.
- **Enable Integration** – This will create an API Key and enable the integration.



Evident . I-REC Code for Electricity

UG-04: Participant


10.3.5 API key

API Key Generated

×

Congratulations: The API key has been generated for Platform Operator 002

To ensure continuity of service, we recommend that you keep a copy of your API key in a safe place, as it will not be visible again. If you lose your API key, you will need to disable the integration and restart the integration process from scratch.

Your API Key is: **01GWTAPZQ4JB121ABXM5GXRJN|** 

Encumbrance Redemption Account:

ERC61C9P

Encumbrance Trade Account:

ET2WSG2R

Make sure you share this API key with Platform Operator 002 in order to complete the integration.

Please click the button below to confirm you have stored your API key.

Confirm API key is Stored

A window will be displayed with your auto-generated Integration API Key, and integration details. In this instance, the Platform Operator is offering an Encumbrance Integration, and a pair of Encumbrance Redemption and Encumbrance Trade Accounts have been generated.

Warning: This API key will only be shown on screen once, so please check and copy the API key before continuing. If the API key is lost, you will need to disable the integration and restart the integration process.



Evident . I-REC Code for Electricity

UG-04: Participant

An enabled integration will show a green badge, “Enabled” and the newly generated pair of Encumbrance accounts.

Platform Operator 002

[Platform Integrations](#) / Platform Operator 002

Platform Operator 002 is a company offering marketplace integrations aimed at Participant users.

Company Address
<https://insertcompanyhere.com>

Marketplace Platform

Encumbrance Marketplace Enabled

— Disable Integration

Description

Our I-REC marketplace connects buyers and sellers across 50 countries around the world.

Permissions Granted 2 Permissions

Account

↓

Connected Since: 2023-03-30

Redemption Account: ERC61C9P

Trade Account: ET2WSG2R

View Account

10.3.6 Completing the Integration

To complete the integration with your chosen Platform, share the API key directly with your chosen third-party Platform Operator.

10.3.7 Encumbrance Trade and Encumbrance Redemption Accounts

Both the Encumbrance Trade and Encumbrance Redemption Accounts function in the same way as a conventional Trade account. These are only available to Participants when they connect to an Encumbrance Integration.

It is possible to initiate a transfer request from a Trade Account to an Encumbrance Trade Account from within the I-REC Registry.

Note: Any certificates held within an Encumbrance Trade Account can only be managed via the third-party Platform. It is not possible to initiate a transfer request from an Encumbrance Trade Account within the I-REC Registry.

Regarding custodianship, the Participant is the owner of the certificates held within these Encumbrance accounts.

10.3.8 Disabling an Integration

When disabling an integration, first ensure that the balance of the Encumbrance Trade Account is zero (0). This can be done via the third-party Platform with which you have an integration.



Evident . I-REC Code for Electricity

UG-04: Participant

To disable an integration, click **Disable Integration**.

Marketplace Platform

Encumbrance Marketplace

Enabled

— Disable Integration

Description

Our I-REC marketplace connects buyers and sellers across 50 countries around the world.

Permissions Granted

2 Permissions

Account

↓

Connected Since:

2023-03-30

Redemption Account:

ERC61C9P

Trade Account:

ET2WSG2R

View Account

A window will be displayed with a warning, a checkbox and two options:

- **Close** – Cancel and return.
- **Disable Integration** – This will disable the API key and disable the permissions granted to the third-party Platform.

Warning

Warning: Are you sure you want to disable the integration with Platform Operator 002?

This will prevent any further data exchange between your account on the Registry and the Platform Operator 002. Any data that has already been shared will not be affected. This action cannot be undone. Please confirm your decision below.

☐ I understand that I am disabling this integration and the non-Evident company will no longer have access to my Evident accounts.

× Close

— Disable Integration

10.3.9 Disabled Integration

A disabled integration stops the third-party Platform from viewing and taking any actions on the pair of Encumbrance Accounts. Once disabled, the Integration page will show a badge, “Not Enabled”.



Evident . I-REC Code for Electricity

UG-04: Participant

Platform Operator 002

[Platform Integrations](#) / Platform Operator 002

Platform Operator 002 is a company offering marketplace integrations aimed at Participant users.

Company Address
<https://insertcompanyhere.com>

Marketplace Platform


Encumbrance Marketplace Not Enabled + Enable Integration

Description

Our I-REC marketplace connects buyers and sellers across 50 countries around the world.

Permissions Granted

2 Permissions

 Account

↓

The Encumbrance Trade and Encumbrance Redemptions Accounts are then marked as **Inactive**. The transaction history for these accounts can be found under the Accounts page.

It is also possible to re-enable an integration. A new API key will be generated and will need to be shared with your chosen third-party Platform.

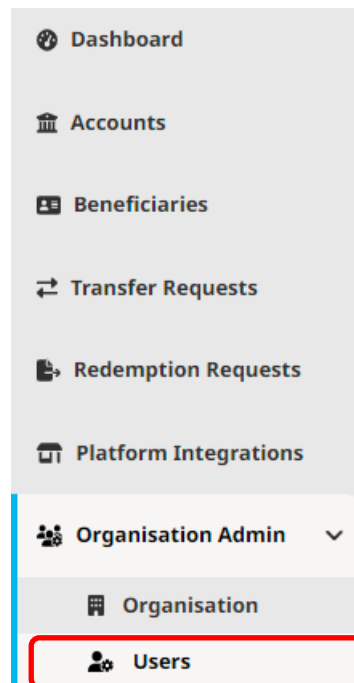


11 Managing Users

11.1 Create a New User

11.1.1 Navigate to User Management

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



11.1.2 Select “Create New User”

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

11.1.3 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.



Evident . I-REC Code for Electricity

UG-04: Participant

Create New User

✓ Save & Configure Permissions

✓ Save

✕ Close

Username *

Title

Email address *

Forename *

Surname *

Telephone *

☐ Active

Notes

User Files

There are currently no files associated with this.

Upload Files

Drop files here or click here to upload.

The following table describes the data fields on this form:

| Field | Description |
|----------------------|---|
| Username | A 3-12 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 address | 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. |

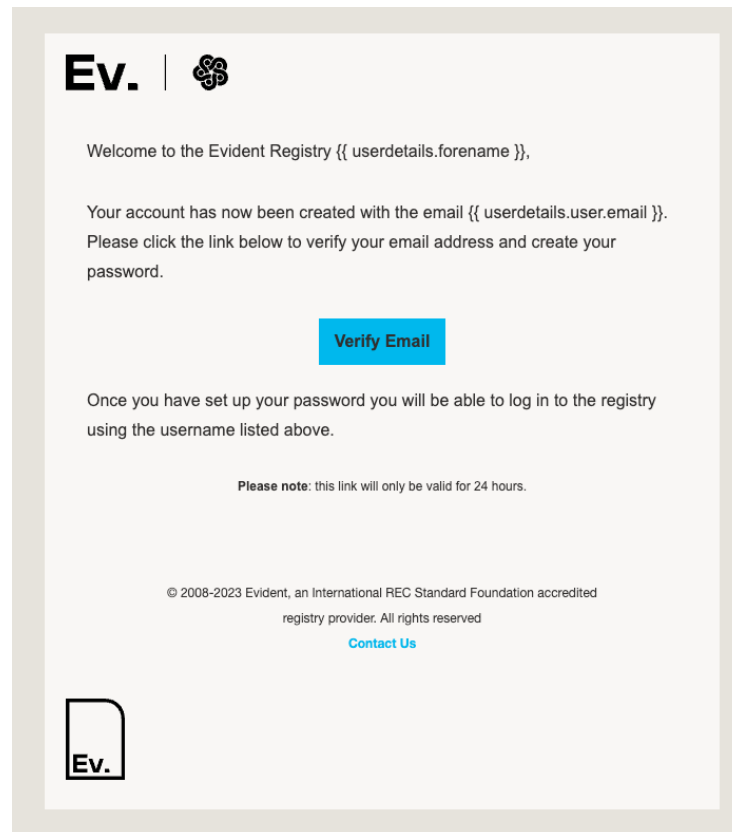
There are three options to choose from:

- **Save & configure Permissions** – This will save the user record and allow you to set their permissions manually (see section 9.2).
- **Save** – This will save the user record with default permissions.
- **Close** – Cancel and close the form, any changes will be lost.



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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.



11.2 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 the new user requires User and Organisation permissions, these can be requested.

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.



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Edit Permissions irecparticipantuser2@mail.com

Reset Permissions

Save

Close

Account

☒ **Global:** Allow user to execute all available actions on accounts

☐ **Balance:** Allow user to be able to see current account balance

☐ **Create:** Allow user to be able to create new accounts

☐ **Delete:** Allow user to be able to delete individual accounts

☐ **Edit:** Allow user to be able to edit individual accounts

☐ **History:** Allow user to be able to view changelog history for a specific account

☐ **Items:** Allow user to be able to see current account holdings

☐ **Statements:** Allow user to be able to view redemption statements within an account

☐ **Transactions:** Allow user to be able to see transactions for a specific account

☐ **View:** Allow user to be able to view individual accounts

Beneficiary

☒ **Global:** Allow user to execute all available actions on beneficiaries

☐ **Balance:** Allow user to be able to see current beneficiary balance

☐ **Create:** Allow user to be able to create new beneficiaries

☐ **Edit:** Allow user to be able to edit beneficiaries

☐ **Link:** [Coming Soon] Allow user to be able to link beneficiary organisation with a beneficiary site

☐ **Statements:** Allow user to be able to view redemption statements for a beneficiary

☐ **Transactions:** Allow user to be able to see transactions for a specific beneficiary

☐ **View:** Allow user to be able to view individual beneficiaries

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

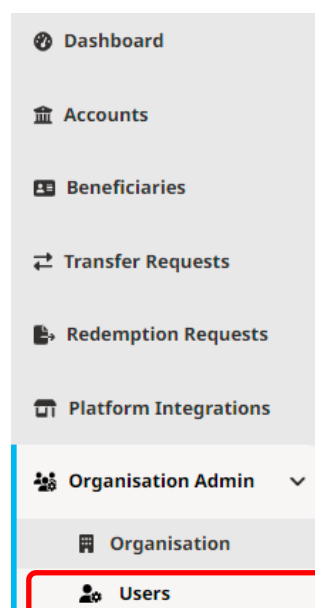
There are three options to choose from:

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

11.3 Edit a User

11.3.1 Navigate to Users

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





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11.3.2 Edit User Details

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

| Users within your organisation | | | | | | | |
|--|------------------|-------------------------------|-------------------------------|-----------|--------------------|--------|--|
| <input type="text" value="Search..."/> | | | | | | | CSV |
| Username | Name | Email | Organisation | Telephone | Organisation Roles | Active | Actions |
| PARTICIPANT2 | forename surname | irecparticipantuser2@mail.com | PARTICIPANT_ORG_2 - PARTIC... | 10912 | Participant | Active | ↺ 🔒 ✎ Edit |

11.3.3 Update User Details

Update details as required.

Edit User

✓ Save

✕ Close

Username *

PARTICIPANT2

Active

Notes

Title

Mr

Forename *

forename

Surname *

surname

Email address *

irecparticipantuser2@mail.com

Telephone *

10912

User Files

There are currently no files associated with this.

Upload Files

Drop files here or click here to upload.

The following table describes the data fields on this form:

| Field | Description |
|------------------|--|
| Username | A 3-12 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. |



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| | |
|---------------|--|
| 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 two options to choose from:

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

11.4 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.

| Users within your organisation | | | | | | | |
|--------------------------------|------------------|-------------------------------|-------------------------------|-----------|--------------------|--------|---------|
| Search... | | | | | | | CSV |
| Username | Name | Email | Organisation | Telephone | Organisation Roles | Active | Actions |
| PARTICIPANT2 | forename surname | irecparticipantuser2@mail.com | PARTICIPANT_ORG_2 - PARTIC... | 10912 | Participant | Active | |

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

| Edit Permissions irecparticipantuser2@mail.com | | Reset Permissions | Save | Close |
|---|--|-------------------|------|-------|
| Account | Beneficiary | | | |
| <input checked="" type="checkbox"/> Global: Allow user to execute all available actions on accounts | <input checked="" type="checkbox"/> Global: Allow user to execute all available actions on beneficiaries | | | |
| <input type="checkbox"/> Balance: Allow user to be able to see current account balance | <input type="checkbox"/> Balance: Allow user to be able to see current beneficiary balance | | | |
| <input type="checkbox"/> Create: Allow user to be able to create new accounts | <input type="checkbox"/> Create: Allow user to be able to create new beneficiaries | | | |
| <input type="checkbox"/> Delete: Allow user to be able to delete individual accounts | <input type="checkbox"/> Edit: Allow user to be able to edit beneficiaries | | | |
| <input type="checkbox"/> Edit: Allow user to be able to edit individual accounts | <input type="checkbox"/> Link: [Coming Soon] Allow user to be able to link beneficiary organisation with a beneficiary site | | | |
| <input type="checkbox"/> History: Allow user to be able to view changelog history for a specific account | <input type="checkbox"/> Statements: Allow user to be able to view redemption statements for a beneficiary | | | |
| <input type="checkbox"/> Items: Allow user to be able to see current account holdings | <input type="checkbox"/> Transactions: Allow user to be able to see transactions for a specific beneficiary | | | |
| <input type="checkbox"/> Statements: Allow user to be able to view redemption statements within an account | <input type="checkbox"/> View: Allow user to be able to view individual beneficiaries | | | |
| <input type="checkbox"/> Transactions: Allow user to be able to see transactions for a specific account | | | | |
| <input type="checkbox"/> View: Allow user to be able to view individual accounts | | | | |

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.



12 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.





13 Permissions

13.1 Account

| Permission | Description |
|--|---|
| Account Management GLOBAL | Grants permission for all below permissions. |
| 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 HISTORY | Allows the user to view Account history page. |
| 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 STATEMENTS | Allows the user to view redemption statements within an 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. |

13.2 Transfers

| Permission | Description |
|----------------------------------|--|
| Transfer Request GLOBAL | Grants permission for all below permissions. |
| 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 REFER | Grants user the ability to refer a transfer. |



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| Permission | Description |
|--------------------------------|---|
| Transfer Request SUBMIT | Grants user the ability to submit a transfer. |
| Transfer Request VERIFY | Grants user the ability to verify a transfer request. |
| Transfer Request DELETE | Grants user the ability to delete a transfer request. |

13.3 Beneficiaries

| Permission | Description |
|--|---|
| Beneficiary Management GLOBAL | Grants permission for all below permissions. |
| 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 STATEMENTS | Allows the user to view redemption statements for a beneficiary. |
| Beneficiary Management BALANCE | Allows the user to view the current balance for a specific beneficiary. |

13.4 Redemption

| Permission | Description |
|------------------------------------|--|
| Redemption Requests GLOBAL | Grants permission for all below permissions. |
| Redemption Request CREATE | Grants user the ability to create redemption requests. |
| Redemption Request VIEW | Grants user the ability to view a non-verified transfer request. |
| 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. |



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| | |
|----------------------------------|---|
| Redemption Request SUBMIT | Grants user the ability to submit a redemption request. |
| Redemption Request REFER | Grants user the ability to refer 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. |

13.5 User

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

13.6 Organisation

| Permissions | Description |
|----------------------------|--|
| Organisation GLOBAL | Allows user to execute all available actions on organisations. |
| Organisation EDIT | Allows user to edit own organisation. |
| Organisation VIEW | Allows user to view individual organisation. |

13.7 Organisation Document

| Permission | Description |
|-------------------------------------|--|
| Organisation Document CREATE | Allows user to create individual organisation documents. |
| Organisation Document VIEW | Allows user to view individual organisation documents. |

13.8 Integration

| Permission | Description |
|------------|-------------|
|------------|-------------|



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| | |
|-------------------------------|---|
| Integration GLOBAL | Allows user to execute all available actions on organisations. |
| Integration CONNECT | Allows user to connect to an available integration. |
| Integration DISCONNECT | Allows user to disconnect from an integration currently connected to their organisation. |
| Integration VIEW | Allows user to view all available platforms and integrations available to their organisation. |



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