# REC Registry permissions model

As part of redesigning the REC Registry the user permissions model has changed. Permissions are granted to REC Registry users so that they can gain access to certain functionality within their account. Account administrators can grant or revoke permissions to users within their account. The permissions model in the redesigned REC Registry will work as outlined below:
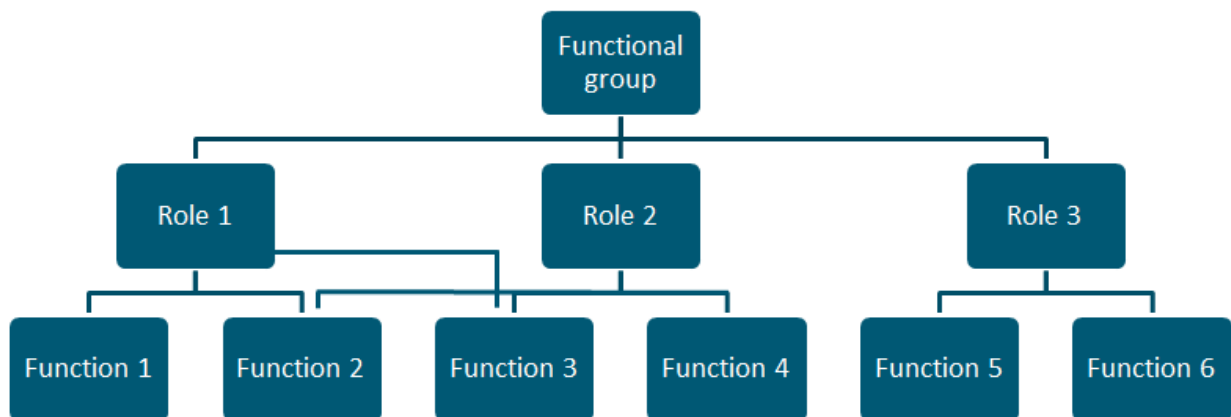
Functional group

- Represents a business unit/function.
- It will comprise of all the required roles required by the users of that business unit/function to do their tasks.
- Functional group will be displayed as a heading on the REC registry permissions page for users to easily locate the required permissions to assign or revoke for particular user.

Role

- Is what will be seen on the screen as a checkbox that will assign or revoke access to underlying features by checking or unchecking the relevant checkbox.

- Is sometimes, also referred to as a permission.
- A role packages all the required functions that are needed to perform a task. For example, the "Update permissions" role comes with "Update Permissions" and "Search users" functions. This is because in order to update permissions, the user will need to search users first.

Function

- Each function maps to a particular menu, user interface page or function as required.
- Granting or revoking a role will control access for a user to the associated user interface page.
- A function may be associated with multiple roles.

How it works

Each user will be assigned one or more roles that will control their access to the associated functions for their REC Registry account thereby providing them access to certain features in the REC Registry application. Only roles required for the appropriate account type will be displayed for selection.

Default roles

There are certain roles that will be assigned by default to account administrators relevant to account types as outlined below:

- When a new general account is approved, all the required roles that a general account would need are granted by default to the first account user (account administrator).
- The account administrator is granted these roles so that they can manage other users and grant roles as required for the account.
- Similarly, when a new account type is approved for registered person, registered agent, STC clearing house and liable entity account types, the roles required to access respective functions are granted to first user (account administrator) of the account.
- When an account upgrade application for additional account types is approved, the default roles for the new account type(s) are then granted to all existing account administrators.

Permission matrix for external users

Below is the permissions matrix for the REC Registry. The matrix covers all the three levels as depicted in the diagram to show what roles each group consists of, which roles will be granted by default to administrators and an overview of what functions map to each role.

Account management

Roles	Overview of functions	Account types where default roles are given to account administrators
Account administration	This role will allow a user to complete account administrator tasks which includes updating account details, updating user details, resetting user passwords, updating user permissions, updating user email preferences, updating user business area contact preferences, suspending users and deleting users. The first user who applied for the account will, by default, be made account administrator in order to manage other users and set up permissions	General
Account - read only	**This role will be granted to all REC Registry users by default**. It is not a role which can be granted or revoked. This role will allow the user to search certificates, search certificate transfers, search certificate tags and view the account certificate summary holdings.	General
Manage users - read only	This is a read only role that allows a user to search for users for the account and to view user details.	General
Apply to upgrade account type	This role allows a user to apply to upgrade the account type and withdraw any account upgrade applications lodged for the account.	General
Account applications - read only	This role is a read only role which allows the user to view all the account applications lodged for the account.	-

Finance

Roles	Overview of functions	Account types where default roles are given to account administrators
Manage fees and invoices	This role will allow users to search fees, create and search payment advices or invoices and to pay an invoice by credit card.	General
Update bank details	This role will allow a user to update bank details. Bank details are required for selling or buying STCs on the STC clearing house and is associated with the STC clearing house account type.	-
Fees and invoices - read only	This is a read only role that will allow users to view fees and payment advices or invoices for the account.	General

Certificates and transfers

Roles	Overview of functions	Account types where default roles are given to account administrators
Tag certificates	This role allows a user to search certificates and tag certificates.	General
Transfer certificates	This role will allow a user search and view certificate transfer details and allow them to offer certificates for transfer as well as withdraw, accept or reject or transfer offers for the account.	General
Transfer certificates - read only	This is a read only that role will allow a user search and view certificate transfer details for the account.	General

Roles	Overview of functions	Account types where default roles are given to account administrators
Search certificate activity log	This role will allow a user to search and view all certificate transactions on the certificate activity log.	General
Sell to STC clearing house	This role will allow a user to offer certificates to sell on STC clearing house as well as withdraw sell offers.	-
Buy from STC clearing house	This role will allow a user to request to buy certificates from the STC clearing house.	-

Surrender

Roles	Overview of functions	Account types where default roles are given to account administrators
Liability surrender	This role will allow a user to offer certificates for annual or quarterly surrender for liability purposes as well as withdraw surrender offers.	Liable entity
Voluntary surrender	This role will allow a user to offer certificates for voluntary surrender purposes as well as withdraw voluntary surrender offers.	General
Non-compliance surrender	This role will allow a user to offer certificates for non-compliance surrender purposes as well as withdraw non-compliance surrender offers.	-
Voluntary and non-compliance surrender read only	This is a read only that role will allow a user search and view voluntary and non-compliance surrender offer details.	General

Liability

Roles	Overview of functions	Account types where default roles are given to account administrators
Liability statements	This role will allow a user to lodge an energy acquisition statement (EAS) or a revision to the EAS as well as view the lodged and assessed EAS and revisions for the account.	Liable entity
Liability - read only	This is a read only role that will allow a user view the lodged and assessed EAS and revisions for the account, search and view liability surrender offer details.	Liable entity

Power stations

Roles	Overview of functions	Account types where default roles are given to account administrators
Create LGCs	This role will allow a user to create LGCs for an accredited power station for the account.	Registered person - when power station application approved
Update primary contact	This role will allow a user to update the power station primary contact.	Registered person - when power station application approved
Electricity generation return	This role will allow a user to search, lodge and view electricity generation returns for power stations.	-
Power station - read only	This is a read only role that will allow a user to search and view all power station applications, power station details, electricity generation returns and LGC eligibility.	Registered person - when power station application approved

Small-scale systems

Roles	Overview of functions	Account types where default roles are given to account administrators
Register solar water heaters and air source heat pumps	This role will allow a user to register a solar water heater (SWH) and to search and view all SWH registrations and drafts.	Registered person
Register small generation units	This role will allow a user to register a small generation unit (SGU) and to search and view all SGU registrations and drafts.	Registered person
Bulk register small-scale systems	This role will allow a user to bulk register small generation units (SGU) and solar water heaters (SWH). It will also allow them to search and view all SGU and SWH registrations.	-
Small-scale system registrations - read only	This is a read only permission which allows a user to search and view all solar water heater and small generation unit registrations and drafts.	-