RegData user guide

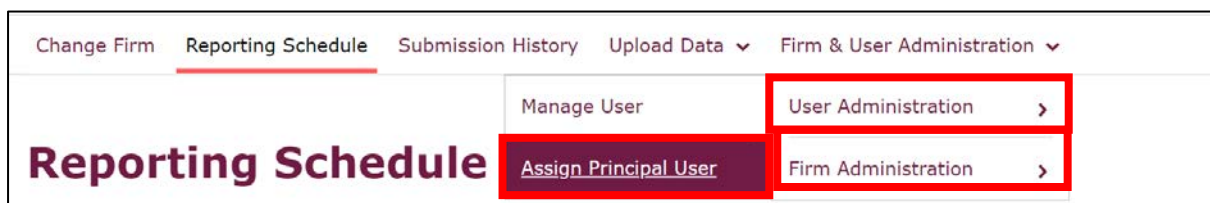## Reassigning the Principal User role

If you are a Principal User, you can reassign the Principal User in RegData.

This user guide explains how to assign the Principal User role to:

- an existing user, or
- a new user

1. Assigning the Principal User role to an existing user

At the top of the screen, hover over Firm & User Administration, then hover over User Administration, and then click on **Assign Principal User**:

Select the user from the list and click on **assign to existing user**:

To change the Principal User either choose an existing user from the list and then click Assign to Existing User, or choose a new user by selecting the Assign to New User button.

ASSIGN TO NEW USER

Existing Users

Name	Email	Access Level
○ User One	User.One@email.com	Firm User
◉ User Two	User.Two@email.com	Firm User
○ User Three	User.Three@email.com	Firm User
○ User Four	User.Four@email.com	Firm User

ASSIGN TO EXISTING USER

At the top of the screen, you'll see confirmation that you've successfully changed the Principal User:

Search Firm   Reporting Schedule   Submission History   Upload Data ⌄   Product Sales Data ⌄   AIFMD ⌄   **Firm & User Administration** ⌄

✓ Principal User has been successfully changed for the Firm. Emails detailing the change are sent to both previous and new Principal User.   ✕
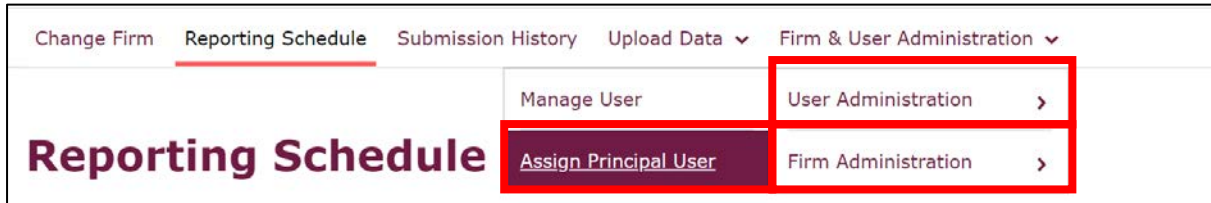
The new and previous Principal Users will both receive an email confirming the change.

The previous Principal User will now become a Firm User.

2. Assigning the Principal User role to a new user

Hover over Firm & User Administration, then hover over User Administration, and then click on **Assign Principal User**:

Click on **assign to new user**:

Enter details of the new Principal User, including title, name, email, phone number and job title. Fields marked with an asterisk (*) are mandatory.

Once complete, click on **assign to user**:

At the top of the screen, you'll see confirmation that you've successfully changed the Principal User:

The new and previous Principal Users will both receive an email confirming the change.

The previous Principal User will now become a Firm User.