



## Providing User Access to an Organization

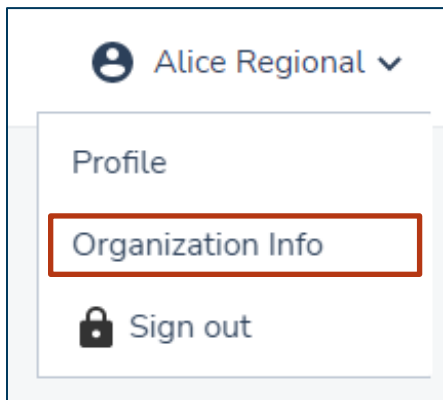
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Every person who logs into WREGIS must have their own login credentials. The activities of each user are tracked for auditing and security purposes. There is no limit to the number of users who can have access to a registered organization. Shared or generic emails cannot be used to create and maintain users.

Any user that does not work directly for your company is considered a third-party agent. Certain permissions, including the management of an organization, are not available for this type of user. All third-party agent users require the approval of the WREGIS Administrator. You must submit a completed [Notice of Agent Designation Form](#) to [wregishelp@wecc.org](mailto:wregishelp@wecc.org) to obtain approval.

To invite a new user to your Organization—

1. Click the arrow next to your name in the top-right corner of the screen and select **Organization Info**.



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2. Navigate to the **Users** tab and check that the user does not already exist on the list. If the user exists, but is **INACTIVE**, click **Edit User** to update the status to **ACTIVE**, set the appropriate permissions, and click **Save**.

| Organization Info   Billing Info <b>Users</b> Admin   Api Keys   Security |            |                    |        |          |                                    |
|---|------------|--------------------|--------|----------|------------------------------------|
|   |            |                    |        |          | <a href="#">Add New User</a>       |
| Billing   | Generators | Upload Generations | API    | Programs | User Status                        |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |

3. If the user does not exist on the list, click **Add New User**.

| Organization Info   Billing Info <b>Users</b> Admin   Api Keys   Security |            |                    |        |          |                                    |
|---|------------|--------------------|--------|----------|------------------------------------|
|   |            |                    |        |          | <a href="#">Add New User</a>       |
| Billing   | Generators | Upload Generations | API    | Programs | User Status                        |
| Manage  | Manage     | Yes                | Manage | Manage   | INACTIVE <a href="#">Edit User</a> |

4. Add the contact information for the new user and set the appropriate permissions.

### Add New User

#### NAME AND EMAIL

First Name \*

Last Name \*

Email Address \*

Email Address Confirmation \*

#### PERMISSIONS

Organization  
☒ None   ☐ Read   ☐ Manage

Transactions  
☒ None   ☐ Read   ☐ Manage

Accounts  
☒ None   ☐ Read   ☐ Manage

Generators  
☒ None   ☐ Read   ☐ Manage

Billing  
☒ None   ☐ Read   ☐ Manage

Programs  
☒ None   ☐ Read   ☐ Manage

Upload Generations  
☒ No   ☐ Yes

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5. If desired, limit user access to designated accounts by marking 'Yes' on **Advanced Account Permissions?** and selecting the accounts the user has access to. Not selecting any accounts after marking 'Yes' on **Advanced Account Permissions?** will give the user *no access* to any accounts of that type in the organization.

**ADVANCED ACCOUNT PERMISSIONS**

Advanced Account Permissions?

☒ Yes ☐ No

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**Active** Select Accounts

No accounts selected for these permissions.

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**Retirement** Select Accounts

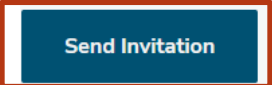
No accounts selected for these permissions.

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**Reserve** Select Accounts

No accounts selected for these permissions.

6. Verify that all information on the screen is correct, then click **Send Invitation**.

Send InvitationCancel

7. If the new user has never logged into the WREGIS system before, they will receive an email invitation to create a user profile and set a password. The password link is unique and expires after one use. Existing users will be able to login as normal—access to the new organization will automatically be added to their profile.

