Information Services Corporation

Administrator's Guide: Corporate Registry

Corporate Registry

July 2016

Information Services Corporation

Disclaimer

Materials in this document are for demonstration purposes only. The characters and events depicted are fictional. Any similarity to real events or persons (whether living or deceased) is unintentional.

Transaction forms can change from time to time. Although we do everything we can to ensure transactions are processed in a timely way, use of outdated forms may result in delays or incomplete transactions. Using the most up-to-date form will help ensure your transactions are processed without delay.

Visit the Information Services Corporation (ISC) website to access the most recent versions of the forms. ISC does not accept responsibility for any losses resulting from the use of outdated forms.

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Revision History

Version #	Revision Date	Summary of Changes	Pages Changed
0.1	July 27, 2016	First draft	

Formatting Note

In this manual, underlining is used to emphasize important points.

Bold type is used to identify key terms the first time they appear in the manual. It is also used for:

- The names of documents. The titles of standardized documents, such as forms, are capitalized as well as bolded.
- Computer applications.
- Specific screens, screen sections, buttons, menus, menu options and fields in those applications.

Italics are used for the titles of acts and regulations.

Green text is used for cross-references. If you are using a PDF version of this document, you can click on this text to go directly to the page number or section indicated.

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Getting Started

If you are the **Administrator** for your company this means you have administrative capabilities that allow you to manage your users and account(s) effectively including:

- **Account management**
  - Determine which payment account is linked to this Corporate Registry account
    - This requires an account password
  - Determine which users can charge to this account
  - Change Account owner
- **User management**
  - Determine who gets access to use your account
    - Add Users and control their privileges
      - Administrator
      - Create Submission
      - Submit Submission
      - Charge Account
    - Control and manage user access
      - Including creating and re-setting passwords

Key Points

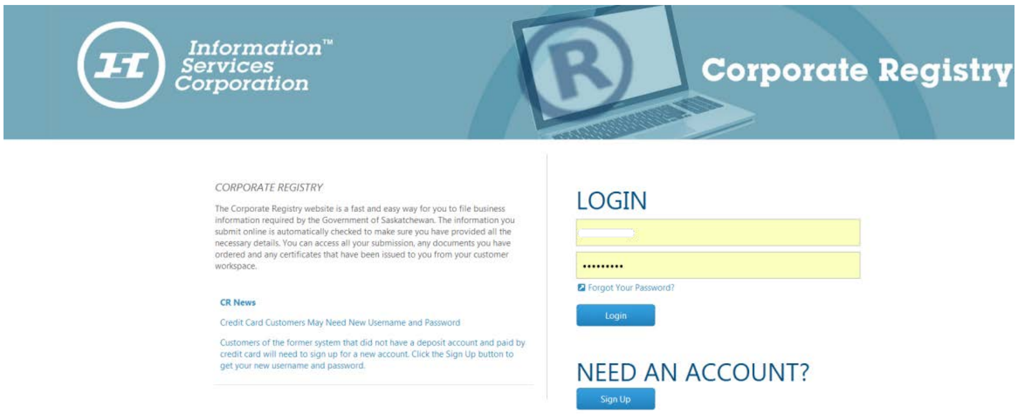
- Most offices will identify at least 2 administrators to ensure there is always a backup in the office
- The most common account and user management needs can be resolved by an Administrator in your office, without requiring you to contact ISC
- Administrators can view all submissions, document orders and any messages for all users working in the account

Logging in to Corporate Registry

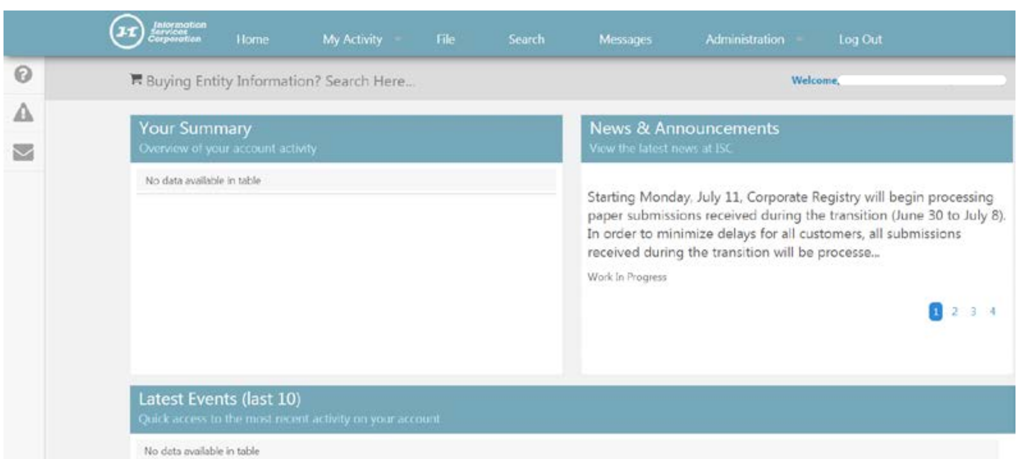
To start:

1. Go to https://corporateregistry.isc.ca/

2. Enter your username and password.



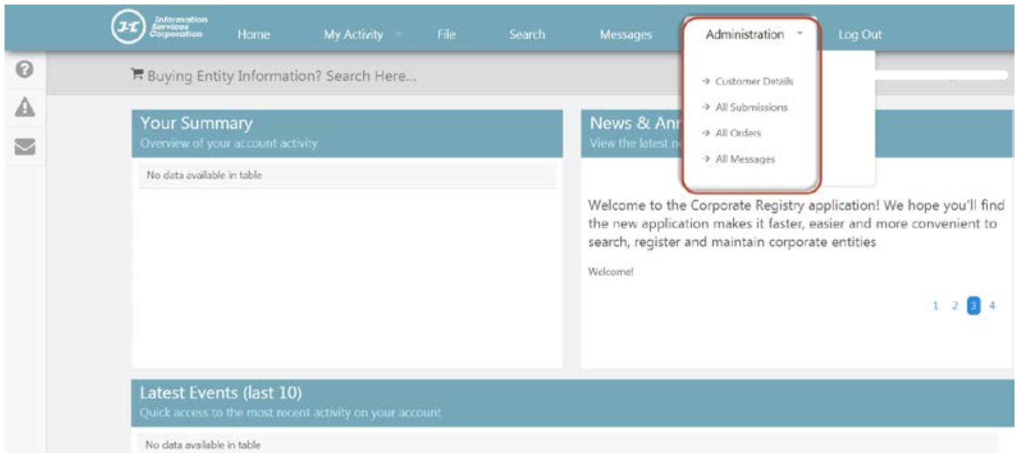
3. Click **Login**. Your **dashboard** will display.



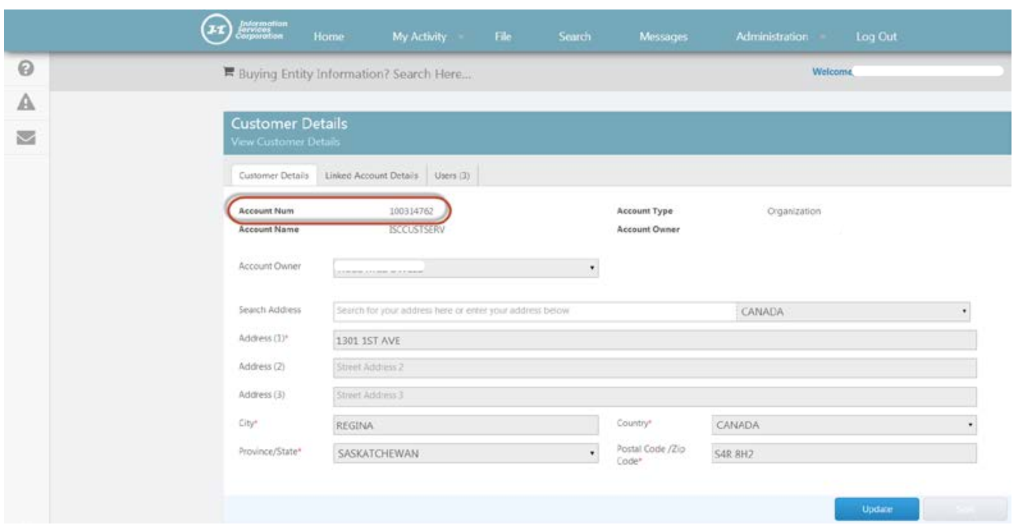
Account Management

One of the first things an Administrator should verify is that the account being charged is correct.

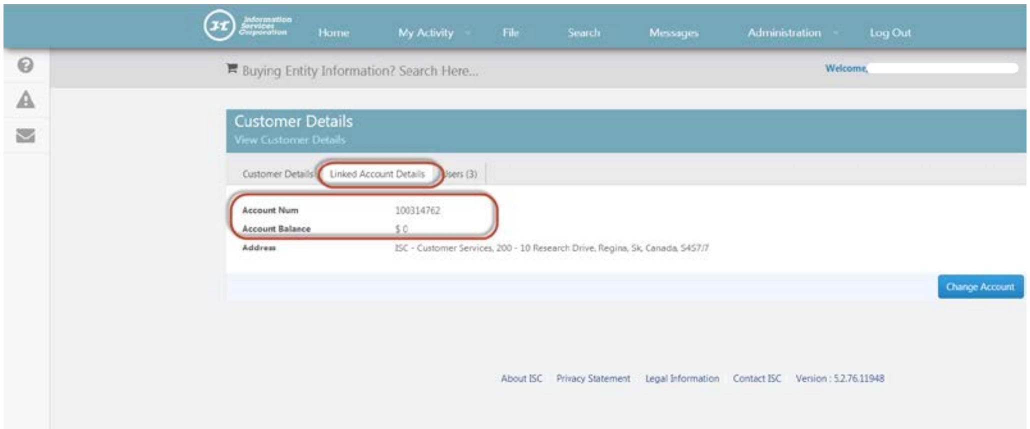
1. Click the **Administration** menu.



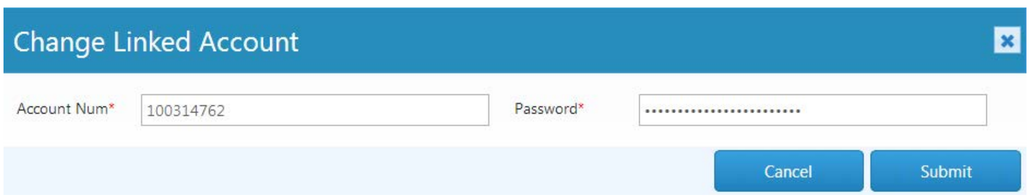
2. Click **Customer Details** and verify your account number.



3. If you want to change the billing account and you know the account number and password for a different billing account, click **Linked Account Details**.



4. Click **Change Account.** A new window will appear.



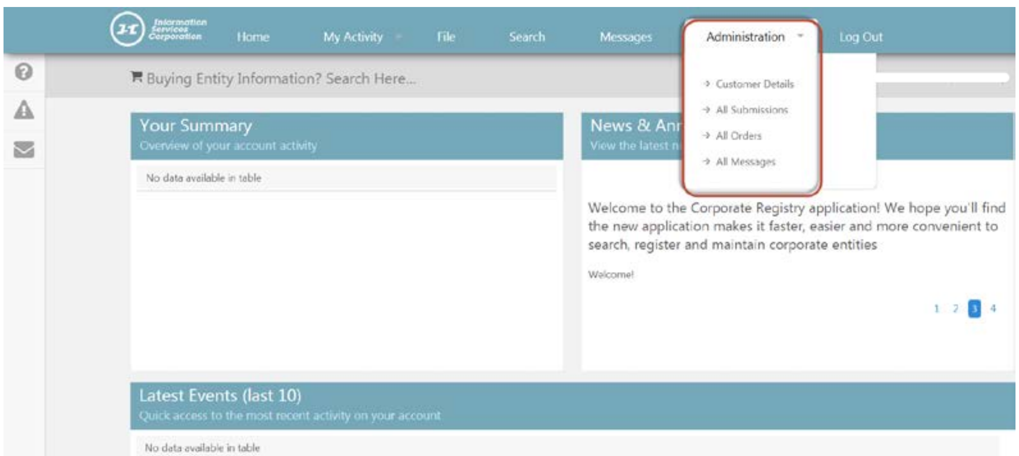
If you want to change the billing account and don't know your account number or password, contact ISC.

User Management

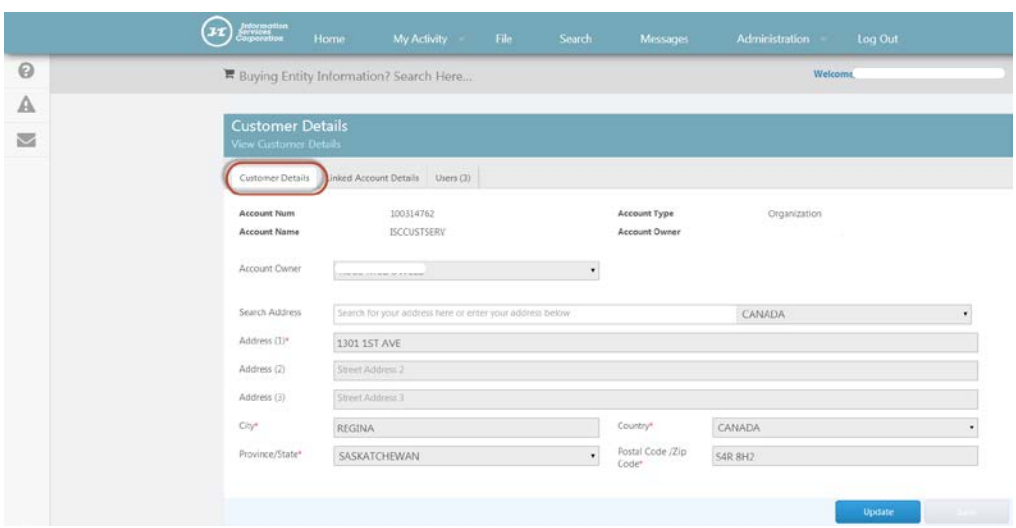
As an administrator you determine who gets access to use your account as well as the type of access for each user. Administrators can also create and reset passwords for any other users associated with this account. You can view, add, delete or modify existing users associated with this account.

The **Manage User's Profile Details** screen is used to setup a new user and modify an existing user with the following information:

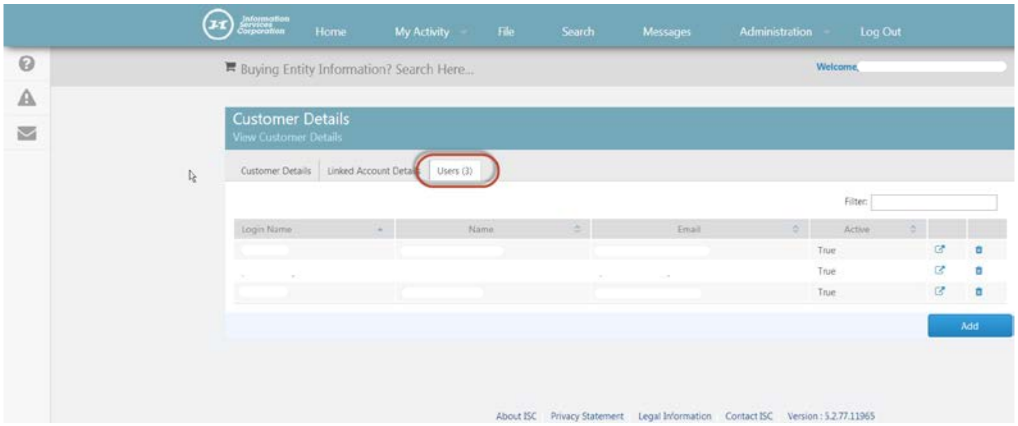
1. Click the **Administration** menu.



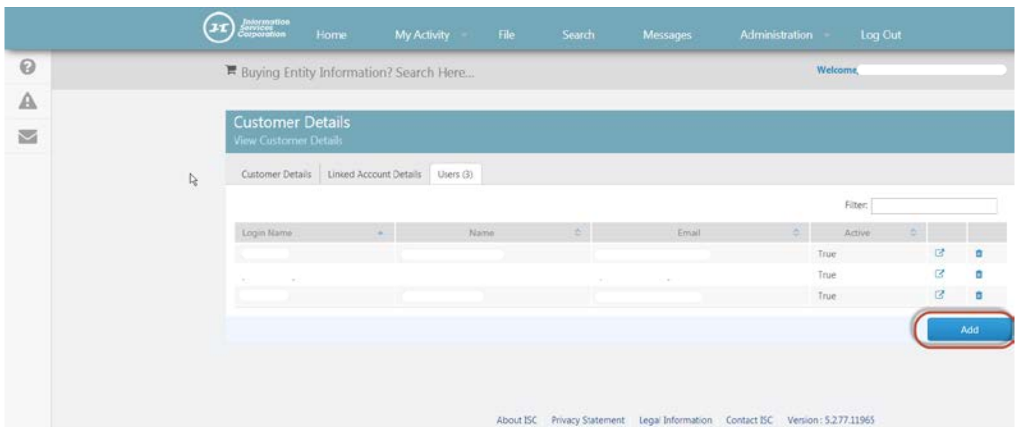
2. Click **Customer Details**.



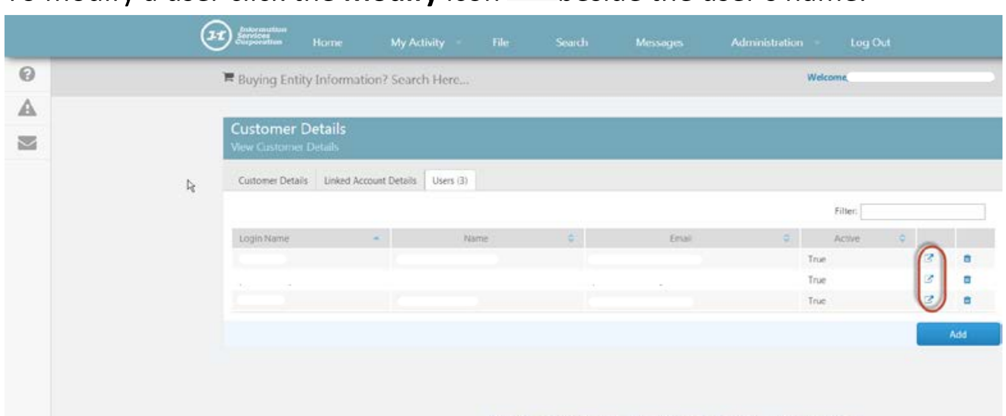
3. To view, add, delete or modify existing users associated with this account Click **Users**.



4. To add a user, click **Add**.



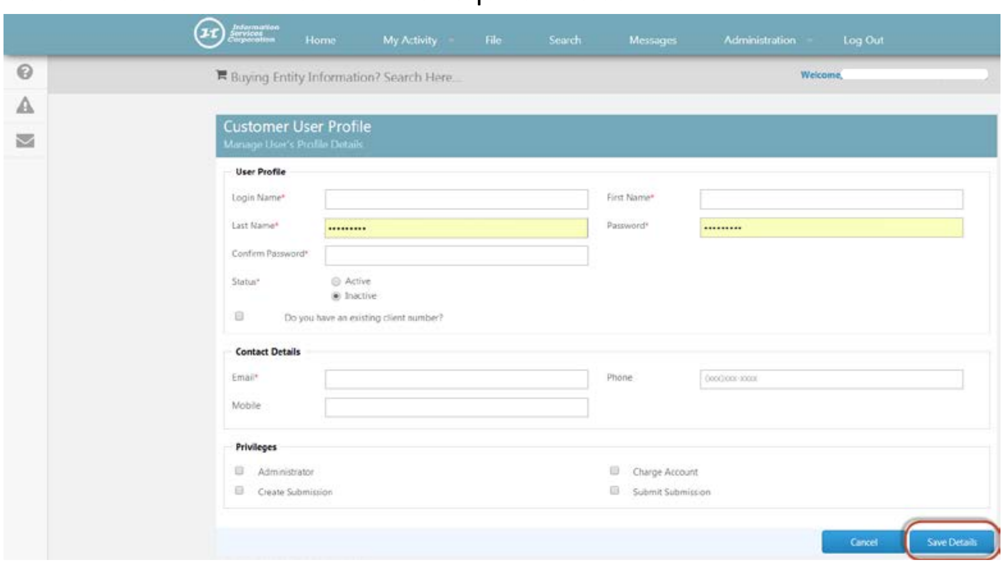
5. To modify a user click the **Modify** icon beside the user's name.



The following screen is the same for adding or modifying an existing user. From this screen you can:

- Create or edit a user name
- Create or edit a user's password
- Change Status of a user from Active to Inactive
- Add a client number
- Enter Contact Details
- Change user privileges
    - Administrator
        - Setup a user with administrator privileges
    - Create Submission
        - Allow a user to create a submission
    - Submit Submission
        - Allow a user to create and submit a submission
    - Charge Account
        - Allow a user top charge to a billing account

6. Supply/change all relevant information and click **Save Details**
   Note – items with an asterisk are required fields.



7. To delete a user, click the **Remove** icon beside the user's name.