



**Information
Services
Corporation**

Administrator's Guide: Corporate Registry



Corporate Registry

July 2016



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 Although we do everything we can to ensure transactions are processed in a timely way, use of outdated forms may result in delays or incomplete transactions.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 ISC does not accept responsibility for any losses resulting from the use of outdated forms.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

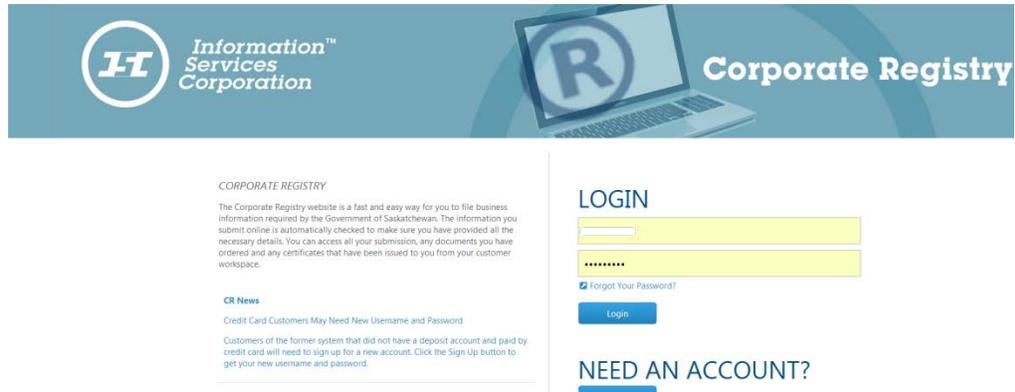
Key Points

- 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

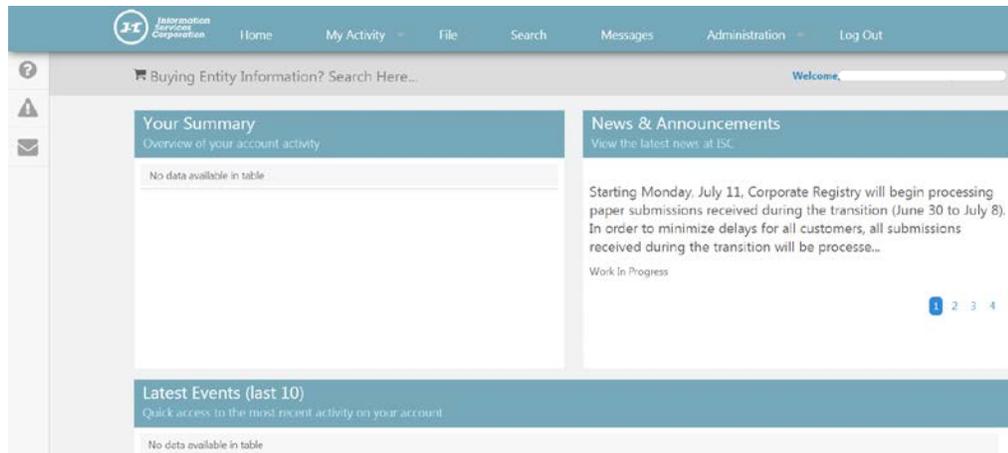
To start:

1. Go to <https://corporateregistry.isc.ca/>
2. Enter your username and password.



The screenshot shows the Corporate Registry login page. At the top, there is a banner with the Information Services Corporation logo and the text "Corporate Registry". Below the banner, there is a "CORPORATE REGISTRY" section with a brief description of the website's purpose. To the right, there is a "LOGIN" section with a form containing two input fields (username and password), a "Forgot Your Password?" link, and a "Login" button. Below the login section, there is a "NEED AN ACCOUNT?" section with a "Sign Up" button.

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

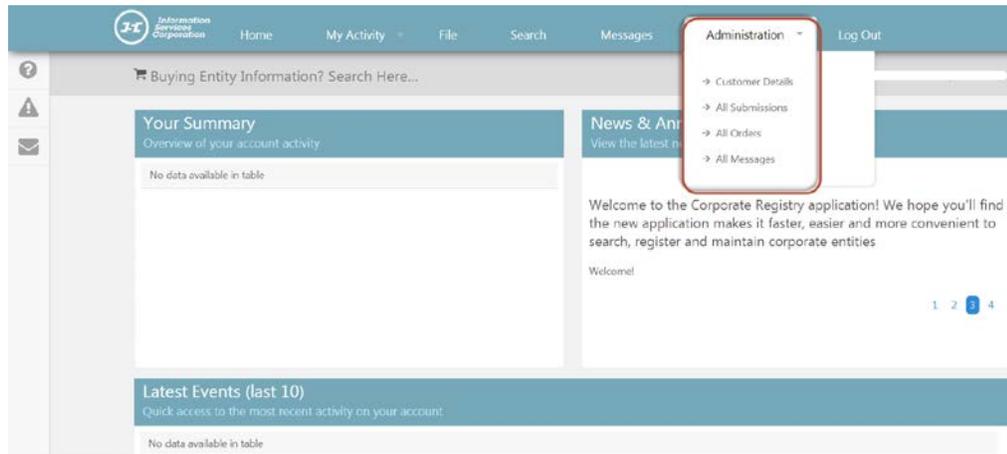


The screenshot shows the Corporate Registry dashboard. At the top, there is a navigation bar with the Information Services Corporation logo and links for Home, My Activity, File, Search, Messages, Administration, and Log Out. Below the navigation bar, there is a search bar with the text "Buying Entity Information? Search Here...". The dashboard is divided into several sections: "Your Summary" (Overview of your account activity) with a table showing "No data available in table"; "News & Announcements" (View the latest news at ISC) with a news item about starting Monday, July 11, and a "Work In Progress" status; and "Latest Events (last 10)" (Quick access to the most recent activity on your account) with a table showing "No data available in table".

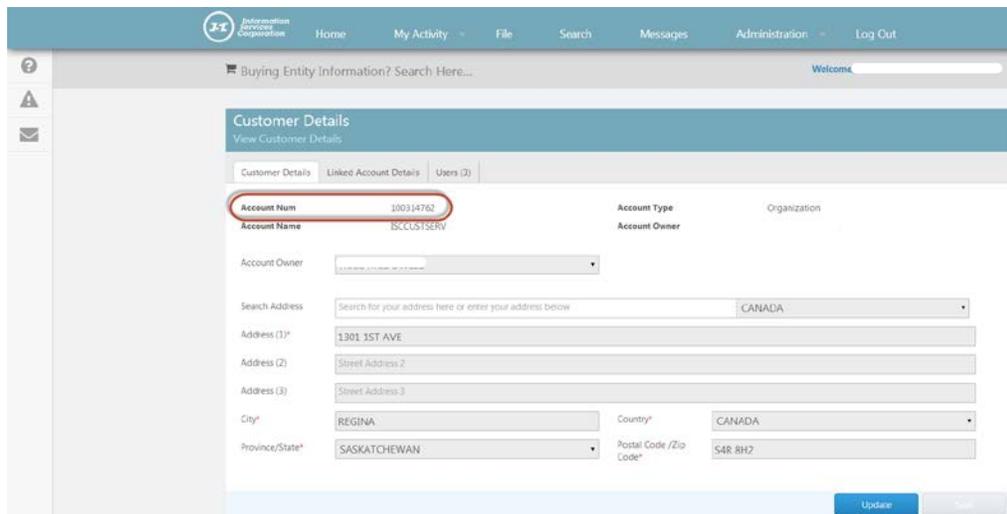
Account Management

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

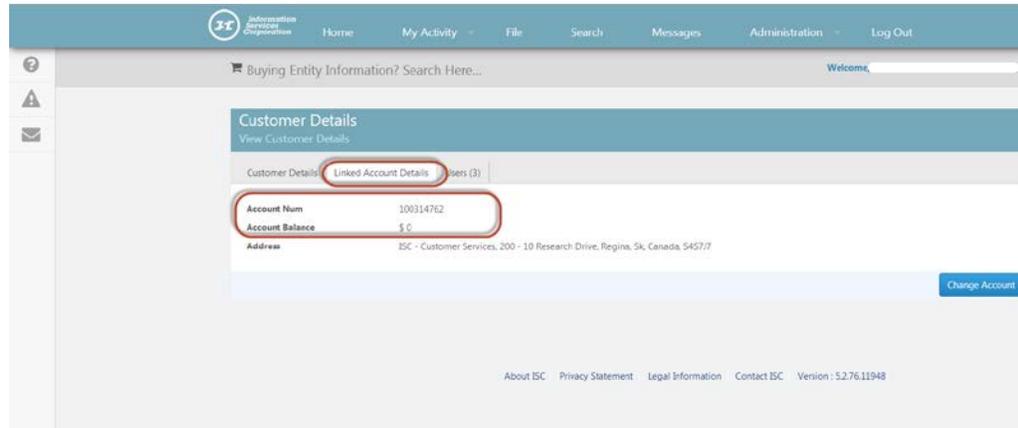
1. Click the **Administration** menu.



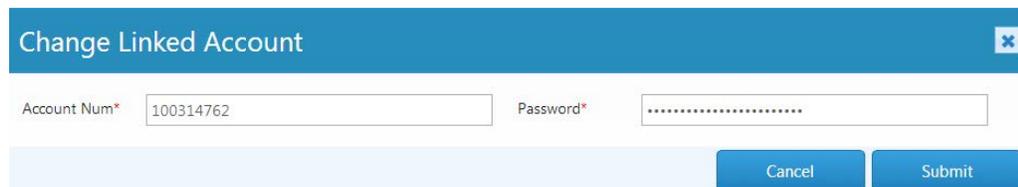
2. Click **Customer Details** and verify your account number.



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.



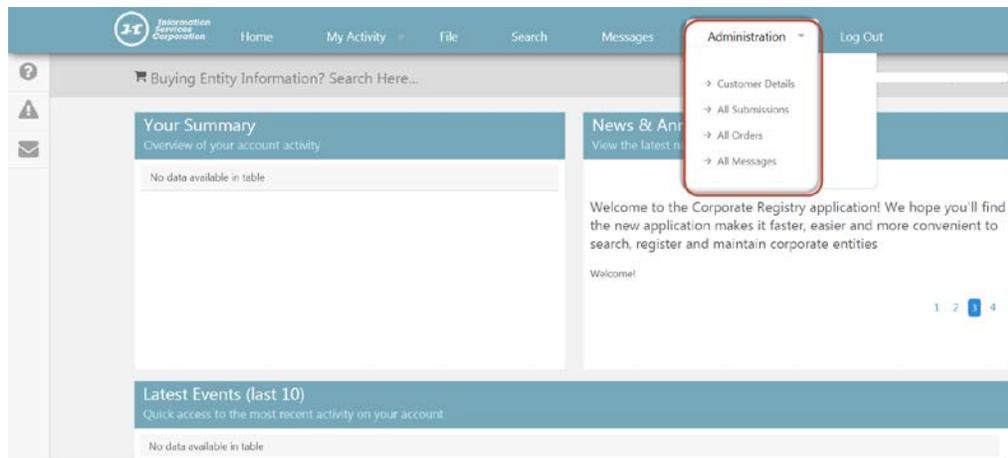
If you want to change the billing account and don't know your account number or password, contact ISC.

User Management

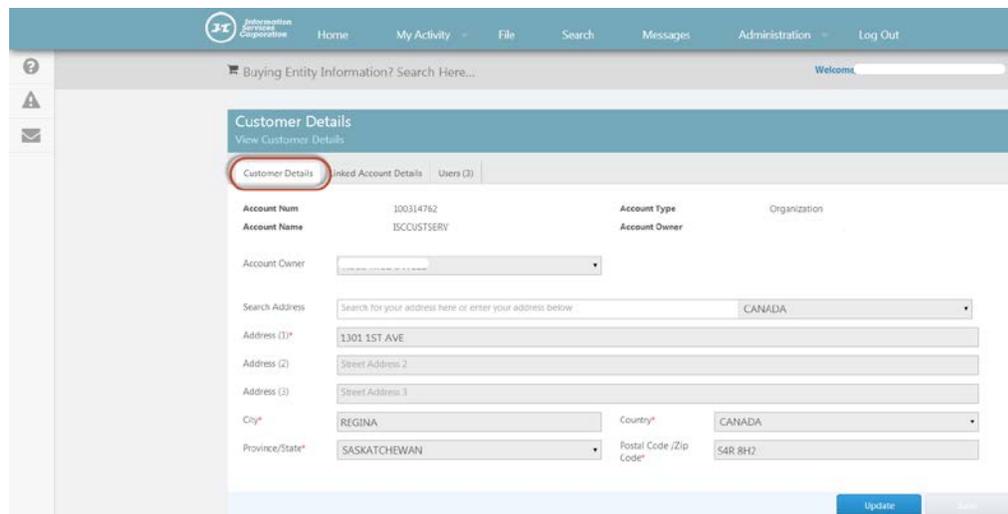
As an administrator you determine who gets access to use your account as well as the type of access for each user. Administrators can also create and reset passwords for any other users associated with this account. You can view, add, delete or modify existing users associated with this account.

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

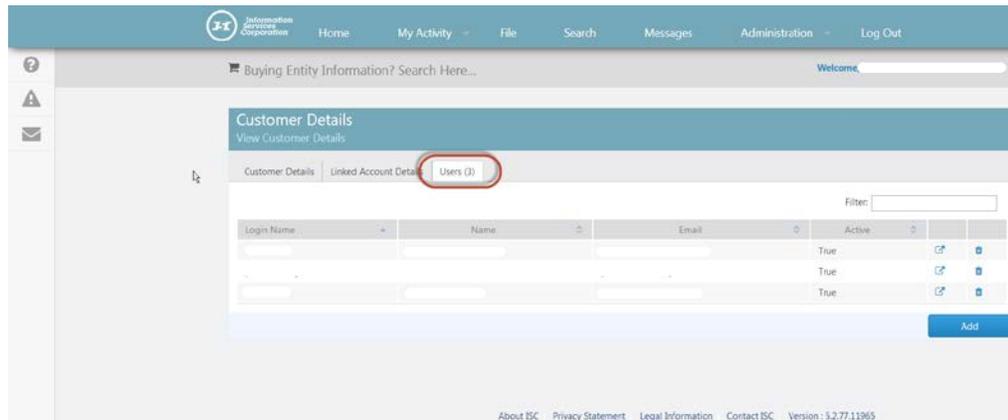
1. Click the **Administration** menu.



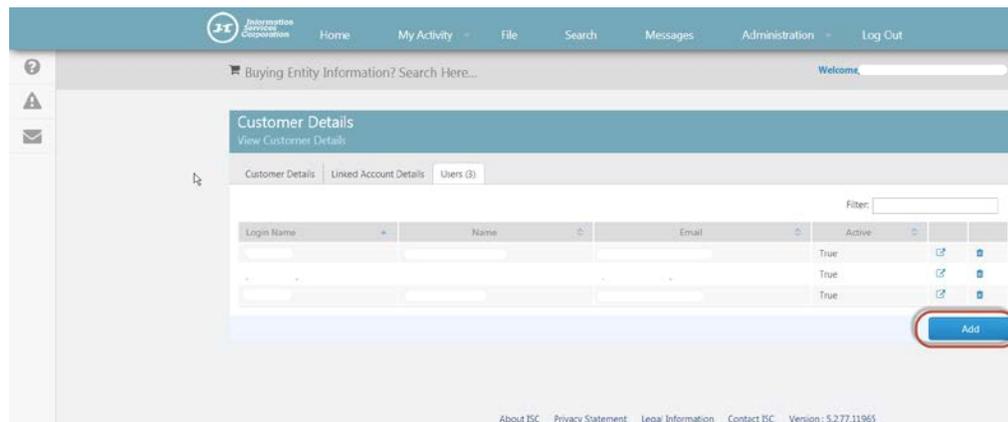
2. Click **Customer Details**.



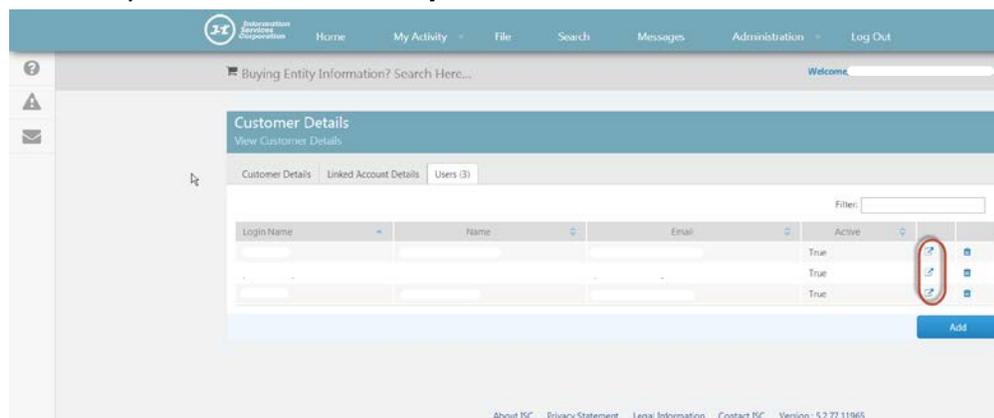
3. To view, add, delete or modify existing users associated with this account Click **Users**.



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



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

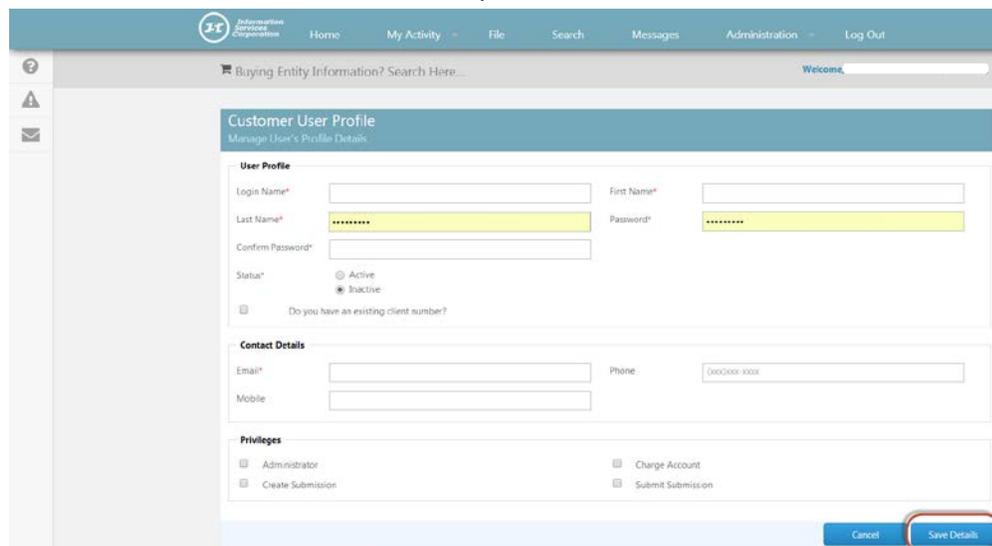


The following screen is the same for adding or modifying an existing user. From this screen you can:

- 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

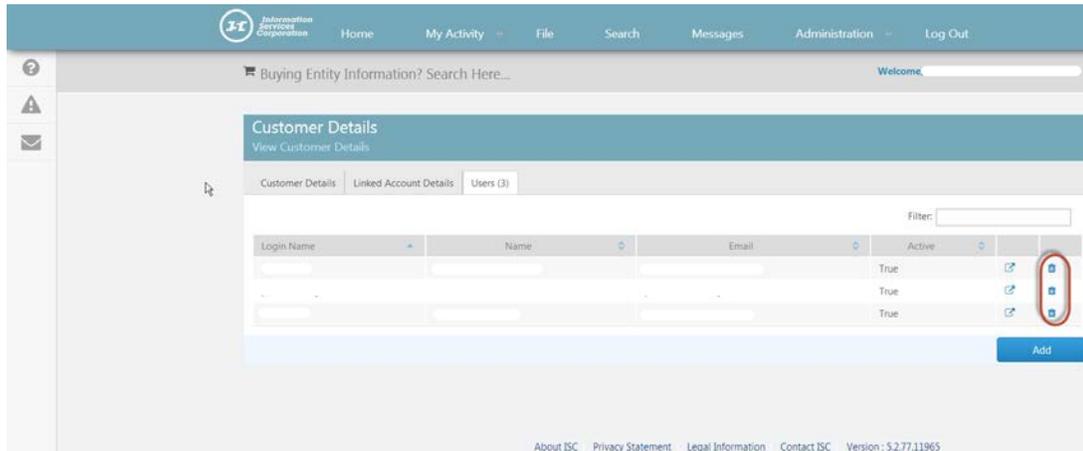
6. Supply/change all relevant information and click **Save Details**

Note – items with an asterisk are required fields.



The screenshot shows the 'Customer User Profile' form. The 'User Profile' section contains the following fields: Login Name* (text), First Name* (text), Last Name* (text), Password* (password), and Confirm Password* (password). The 'Status*' section has radio buttons for Active and Inactive. Below that is a checkbox for 'Do you have an existing client number?'. The 'Contact Details' section includes Email* (text), Mobile (text), and Phone (text with a mask). The 'Privileges' section has checkboxes for Administrator, Create Submission, Charge Account, and Submit Submission. At the bottom right, there are 'Cancel' and 'Save Details' buttons, with 'Save Details' highlighted by a red box.

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



Information Services Corporation Home My Activity File Search Messages Administration Log Out

Buying Entity Information? Search Here... Welcome

Customer Details

View Customer Details

Customer Details Linked Account Details Users (3)

Filter:

Login Name	Name	Email	Active	
			True	  
			True	  
			True	  

Add

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