

## Online Services Portal - Presenter Groups for CSPs and RPs

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Corporate Services Providers (CSPs) and Regulated Presenters (RPs) are eligible for enhanced access to the Online Services Portal.

### Corporate Services Providers

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CSP presenter groups can be set up for holders of a full fiduciary licence with the Guernsey Financial Services Commission (GFSC). They have enhanced permissions on the Online Services Portal which allows them to:

- Access all companies on the register in order to make submissions or to add them to their 'My Companies' watch list without the need for PIN numbers
- Access all submission types, including company incorporation, name reservation and registration of directors.

### Regulated Presenters

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RP presenter groups can be set up for entities holding other licences with the GFSC. They will also have some enhanced permissions on the Online Services Portal to:

- Access all companies on the register in order to make submissions or to add them to their 'My Companies' watch list without the need for PIN numbers
- Access most submission types, including the ability to make online director registrations but **not** company incorporations.

### Setting up a CSP/RP presenter group

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To set up a new CSP or RP presenter group you will need to email a request to [enquiries@guernseyregistry.com](mailto:enquiries@guernseyregistry.com) including the following details:

- Name of licence holder
- Type of licence held with the GFSC
- Address and telephone number
- Name and email address of the person to be set up as System Administrator

The Registry will consider the request and, if approved, the group will be set up. The system administrator will be sent log-in details for the Online Services Portal.

## Adding presenters to a group

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The System Administrator is able to add further users to the Presenter Group. Once logged on, go to 'Group Users' and select 'Add New User'. The new user **should not** select the Register option on [www.greg.gg](http://www.greg.gg) as this will not add them to the presenter group.

Individuals in presenter groups SHOULD have their own personal logon. It is not advisable to have a group logon.

If you get a message saying 'Please choose a different Email Address. This address has already been registered', please contact the Registry. It may be that the person you are trying to add has previously registered themselves to use the website as an individual rather than as part of the CSP/ RP presenter group.

You will be able to assign the new user one of the following presenter roles:

### System Administrator

- Create and Complete Submissions
- Search Submissions in 'My Workspace'
- Manage Presenter Group Workspace
- Add Companies to the Presenter Group Company Portfolio
- Manage the Presenter Group Company Portfolio
- Add a Registry credit account to the Presenter Group
- View Registry Account Statements and Transactions
- Administer your Presenter Group
- View and print all Presenter group certificates in 'Group Events'
- Add/Remove Presenters in the Presenter Group
- Use the Data Download Functionality

### Operator

- Create and Complete Submissions
- Search submissions in 'My Workspace'
- Add Companies to the Presenter Group Company Portfolio
- View Registry Account Statements and Transactions
- View and print Presenter certificates in 'My Events'
- Use the Data Download Functionality

### Clerk

- Create Draft Submissions
  - Search submissions in 'My Workspace'
  - Add Companies to the Presenter Group Company Portfolio
  - View Registry Account Statements and Transactions
  - View and print Presenter certificates in 'My Events'
  - Use the Data Download Functionality
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## Adding an account to a presenter group

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If you have had an application for a credit account accepted, you will be posted details of the account number and account PIN. You will need both of these to add the account to the Presenter Group.

**Note:** This needs to be done by a presenter group administrator.

To do this go to 'Group Profile' and select 'Add Account' and enter the account details you have been provided with. Once you have added the account to the Presenter Group, you will need to add it to each user you want to have access to the account.

Go to 'Group Users' and select the icon next to the person you want to assign the account to, and then select 'Add Account'.

You can then view account statements and transactions for the account in 'My Accounts'. For further information on accessing account statements please see the 'Accessing online account statements' guidance note.

## Removing a presenter from the group

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If a user on your Presenter Group leaves the organisation or you no longer want them to have access to the online services portal, a System Administrator can make their login 'Inactive' by going to 'Group Users', selecting the 'pen and paper' icon next to the person's name and changing their status to 'Inactive'. This will then change the icon to 'N/A'.

If you later want to reinstate a person to the Presenter Group, you will need to request the Registry to change their status back to 'Active'.

## Managing group submissions

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If a Clerk drafts a submission, it will need to be moved to an Operator or System Administrator to be submitted.

To do this, a System Administrator will need to go to 'Group Workspace' and tick the box next to the submission to be moved and then go to the dropdown list called reassign and select the person they wish to assign it to. This can then be viewed in the 'my workspace' of the person it was reassigned to.

The submissions in the Group Workspace can be filtered by User and by Status. They can also be sorted by each of the 6 headings by clicking on the heading name.

Registered submissions can be reassigned to other users from the group workspace, This will enable the submitted documents to be viewed in the individuals 'my workspace'. **Add search functionality 'workspace'**

**Please note:** any submissions deleted from the group or presenter's workspace does not delete the submission from the Registry system.

## Adding companies to 'My Companies'

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Any presenter can add companies to their 'My companies'. This can be done by clicking 'My companies' and then 'add company'. You will then need to enter the company registered number and click 'search'. The company will come up and you will need to click the 'select' circle and then 'add company'.

Notifications will be sent to the user's 'My Events' each time a submission is filed against the company.

They can also view the company's details by selecting the icon next to the name in 'My Companies'.

The company will also be added to the 'Group Portfolio' which can then be viewed and transferred to a different presenters 'my companies' by a group administrator.

To do this you will first need to go to 'Group Portfolio'. You will need to tick the boxes of the companies you want to reassign and then select the presenter it is to be reassigned to from the 'reassign selected to' drop down menu. The new presenter will then be able to view the company in their 'my companies'.

## Office opening hours & contact details

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If you need any more information please contact the Registry:

**Opening hours for telephone enquiries:** Mon-Fri 9:30am - 5pm (10am - 5pm on Wednesdays)

**Telephone:** +44 (0)1481 743800

**Email:** [enquiries@guernseyregistry.com](mailto:enquiries@guernseyregistry.com)

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