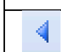
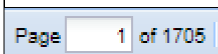
# 3. Registry Pages/ Tables and Navigating them

Users can navigate or perform functions within the registry via the buttons available on the tables or by sorting the columns from tables.

While each of the Registry's pages involve different functions, the navigation functionality is similar throughout the Registry's sections.

## 3.1 Table navigation

Navigation within a widow can be done through an array of buttons found surrounding any window. These buttons increase the registry's efficiency by allowing you to quickly navigate through your projects and holdings.

| Button | Action |
|---|---|
|  and  | Skip to first or skip to final page of table |
|  and  | Move forward or back one page in table |
|  | Skip to a certain page of the table |
|  | Refresh table/screen |
|  | Hides additional details (e.g. project serial number, standard or project status) |
|  | Displays additional details |
|  and  | Hides or displays a table |

The IHS Markit Environmental Registry consists of eight tabs that provide users with different data and functionality.

1) My Account Summary**:**

   The **My Account Summary** page is the IHS Markit Environmental Registry landing page used for viewing notifications, and account settings and credit summary of the user's portfolio.

2) Manage My Units:

   The **Manage My Units** page lists all credit issuances, holdings, and retirements. It is the portfolio management screen from which all transactions are initiated.

3) My Projects and Issuances**:**

   The **My Projects and Issuances** page lists the status and details of all projects and issuances initiated by the account.

4) RFI (Request For Information):

   The **RFI** page is the Request for Information Platform that connects buyers and sellers on the

IHS Markit Environmental Registry.

5) User Admin:
The **User Admin** page displays account user information.

6) Reports:
The **Reports** page displays lists of activities by transaction type over any timeframe.

7) Activity Log:
The **Activity Log** page displays a log of all transactions and changes of statuses of credits and projects in an account.

## 3.2 My Account Summary

Account login brings users to the Registry home page. This page displays account information, holdings and notifications.


### Credit Summary

The Credit Summary box in the center of the page displays account information. This information is sorted vertically by standard and account holder and horizontally by credit status: issuances, holdings, and retirements as well as displaying pending issuances and pending transfers.

| Field | Definition |
|---|---|
| Standard | The standard of the project activities. |
| Measure | Unit of measurement of credits (e.g. VER ($tCO_2e$), PVC ($tCO_2e$), etc.) |
| Issuances | Total amount of credits issued into the account |
| Holdings | Total amount of credits currently held in the account |
| Retirements | Total amount of credits retired in the account |
| Pending Issuance | Total amount of credits in the process of being issued into the account |
| Pending Transfer | Total amount of credits in the process of being transferred into or out of the account |

### Accounts

This field allows users to view all accounts for which they are permissioned. Clicking on an individual account displays the account's credit information in the **Credit Summary** box. Credit summaries for multiple accounts can be viewed by holding down the Control button and clicking on all desired accounts.

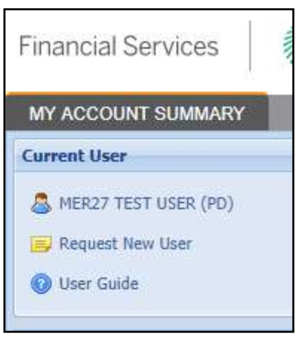
**NOTE:** Accounts and sub-accounts can be created by clicking the **New** button.



- To view your Account ID, simply select your account and push the **Open** button and view the Account ID field in the Account Details window.

## Current User

This field displays current user information and allows for requesting new users.

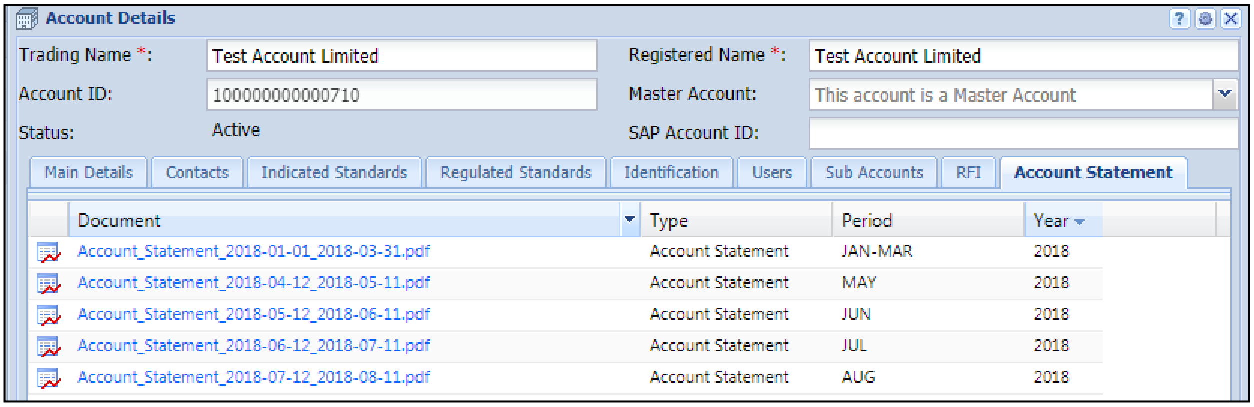



- Click on the blue username link to open a User Details window that displays all user information as currently stored in the Registry.
- Click on the **Request New User** button to access the new user application form.

## Quarterly Account Statement

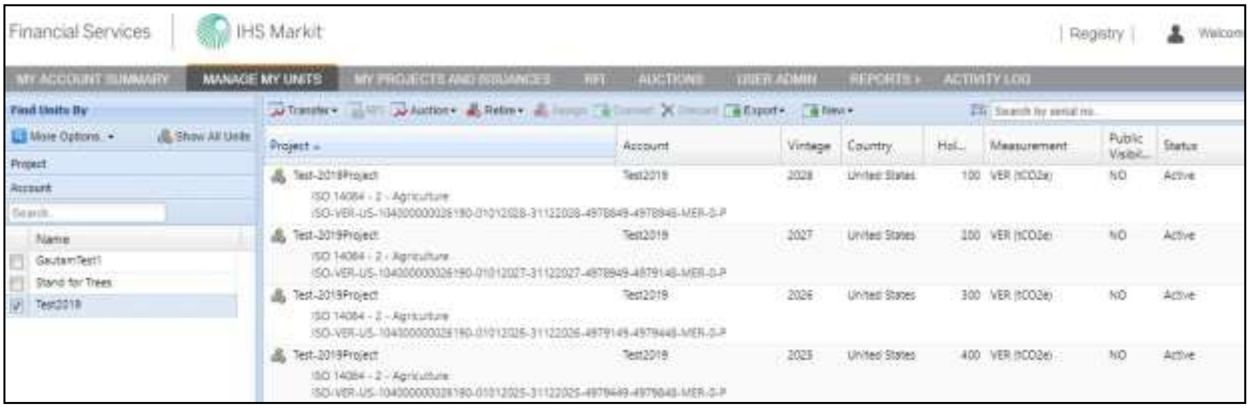
- Account Statements are created to provide a concise summary of activity (issuances, transfers, etc.) in your account for the most recent calendar quarter. Users will be notified via email when the new Statement in PDF format is available for download.

- Double click on the account name located on the left panel under My Account Summary to view and download the Account Statement.

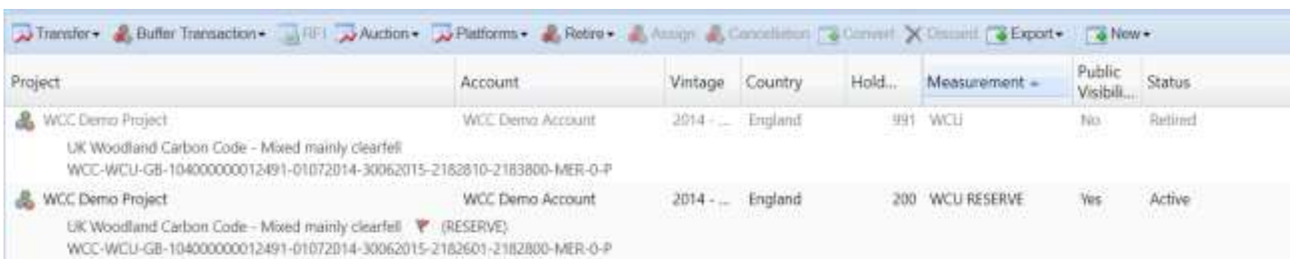

Account Details
Trading Name *:
Test Account Limited
Registered Name *:
Test Account Limited
Account ID:
100000000000710
Master Account:
This account is a Master Account
Status:
Active
SAP Account ID:
Main Details
Contacts
Indicated Standards
Regulated Standards
Identification
Users
Sub Accounts
RFI
Account Statement
Document
Type
Period
Year
Account_Statement_2018-01-01_2018-03-31.pdf
Account Statement
JAN-MAR
2018
Account_Statement_2018-04-12_2018-05-11.pdf
Account Statement
MAY
2018
Account_Statement_2018-05-12_2018-06-11.pdf
Account Statement
JUN
2018
Account_Statement_2018-06-12_2018-07-11.pdf
Account Statement
JUL
2018
Account_Statement_2018-07-12_2018-08-11.pdf
Account Statement
AUG
2018

## 3.3 Manage My Units

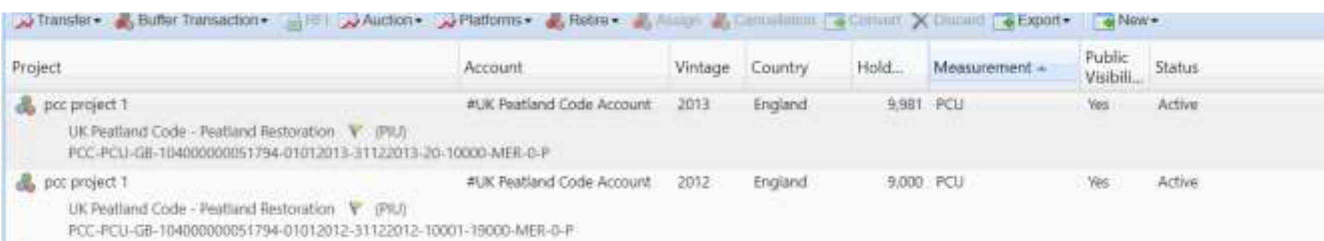
The “Manage My Units” page is the credit portfolio-management page of the Registry. In this section of the registry the client will be able to manage the credits by assigning, transferring, retiring, or listing credits in our RFI platform. The main window displays all credits held or retired in accounts permissioned to the user.




**WCC holdings**




**Peatland Holdings**

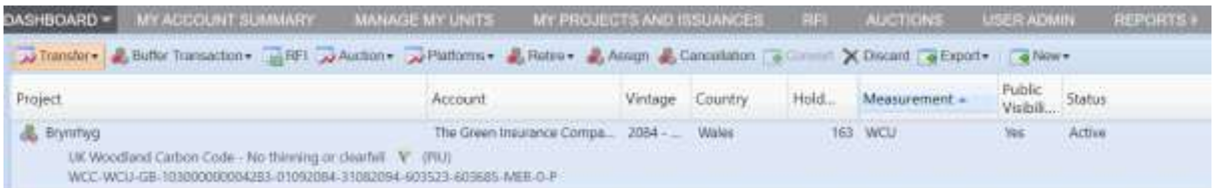



**Credit Window**

Credit information in the credit window (the main right-hand part of the ‘Manage my units’ page) is displayed with Project Title, Account, Vintage, Origin, Holdings, Measurement, Status and Additional Certification.

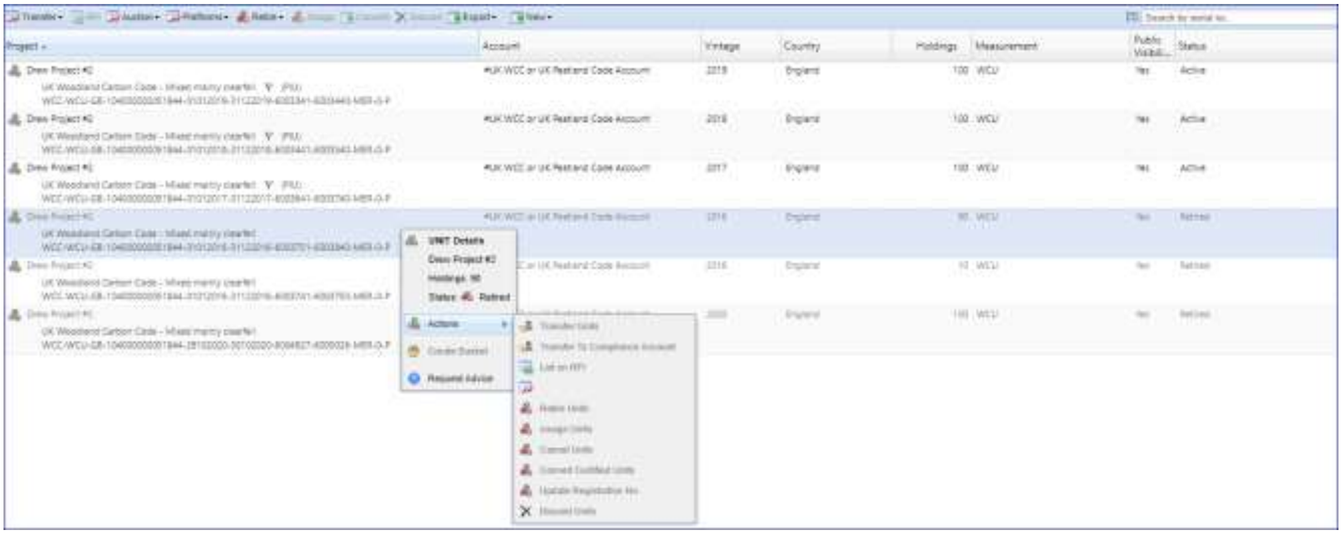
**NOTE:** Credit status can be displayed as one of the following: Active (ie WCU or PCU), Pending Issuance (ie PIU), Pending Transfer, Retired, RFI Listed.

The credit window has a menu of buttons across the top (eg to transfer, assign, or retire). These buttons are activated when a unit block or credits is selected. The buttons and fields enable the user to assign, transfer, retire credits, or place them on the RFI platform.

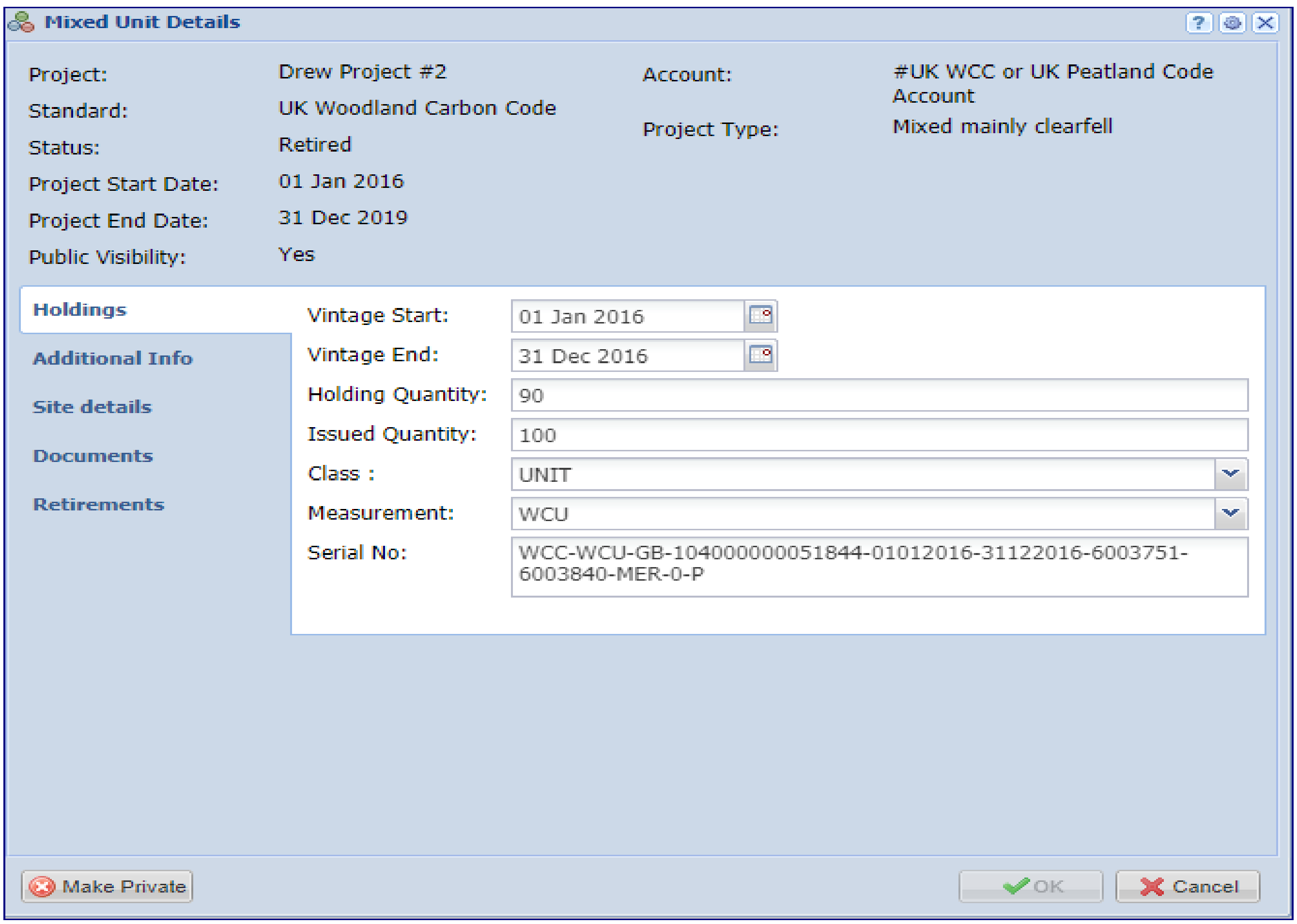




| Button/Field | Action |
|---|---|
| Transfer | Opens a window prompting the user to input details for transferring units to another account |
| RFI | Opens a window prompting the user to input details for listing credits on the RFI Platform |
| Auction | Opens a window prompting the user to input details for listing bids on an auction |
| Retire | Opens a window prompting the user to input details for retiring units within the account |
| Assign | An activity in which a holder of Validated Units commits to retire those Units upon verification. Assignment is irreversible, and an Assigned Unit will be retired immediately upon verification. |
| Convert | Not an active button for Registry users |
| Discard | Not an active button for Registry users |
| Export | Opens the reporting options menu |
| Export to Excel | Exports listings in window to an Excel spreadsheet |
| Export to PDF | Exports listings in window to an Adobe PDF document |
| New | Opens a menu for creating new projects and issuances |
| Search by serial no… | A search field for serial numbers. The functionality searches for serial numbers beginning with the characters typed into the field. |

- Right-click any of the unit blocks to display **Unit Details**. All actions and transaction options are listed that are enabled for those credits.

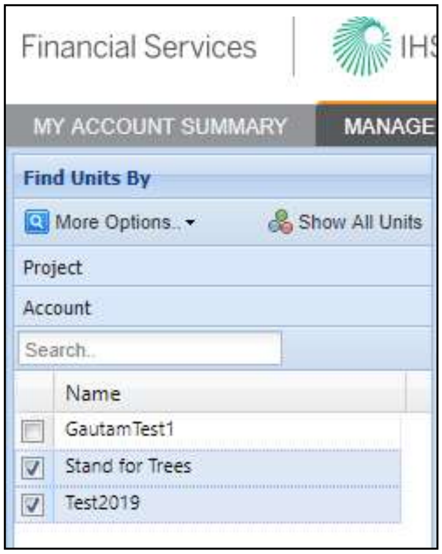


- Double-click on any credit to display all **Mixed Unit Details** including Unit, Project and Issuance Details like Vintage Period, Serial Number, and project documents.



## Find Units By

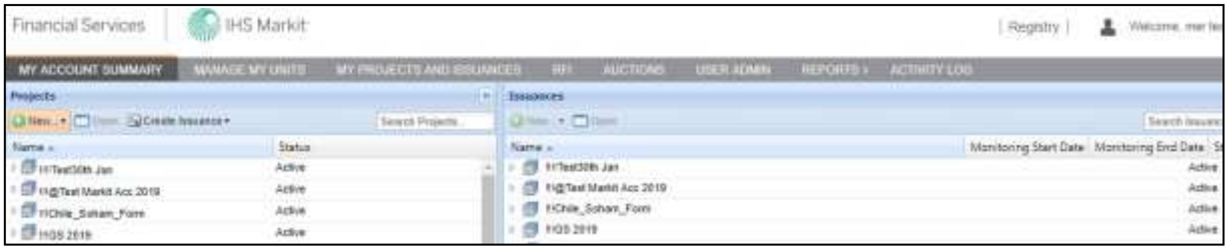
The **Find Units By** heading enables users to select units. The tab defaults to allow users to select by Project, Account, Standard, Project Type, Country, Unit Measurement, Unit Class, Environmental Category, and Status.




- The **Show All Units** button clears the selection and displays all units.

## 3.4 My Projects and Issuances

This tab displays all projects and issuances created in the user's account(s). It is divided into two windows: Projects and Issuances. In this tab you will be able to create new projects (left) and issuances (right).




### Projects

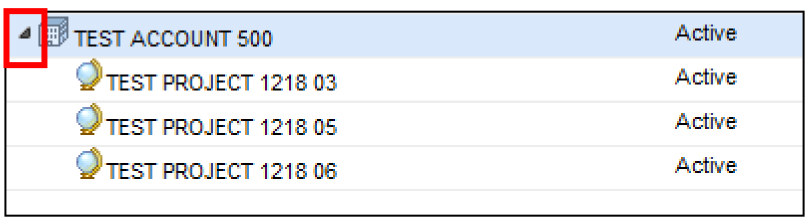
This window displays all projects created within your account(s). This window is used to create new projects and to view the status of projects submitted for registration. Below is a summary of project statuses and what each status means to the user.

**Project Status**

| Project Status | Definition |
|---|---|
| Draft | Project has been saved, but not submitted by user for review by IHS Markit Operations |
| Pending Review – Under Development (Markit) | Project has been submitted to IHS Markit and is being reviewed by IHS Markit Operations |
| Pending Review – Under Development (3rd Party) | Project has been submitted to a third party or Regulator for review |
| Pending Review – Under Development (Customer) | Project has been reviewed by IHS Markit Operations or the Regulator and requires action by Customer |
| Active | Project registered and listed on Registry |
| Discarded | Project entry cancelled and no longer listed on Registry |
| Pending Review – Validation (Validator) | Project has been submitted to the Validator for review |
| Pending Review – Validation (3rd Party) | Project has been approved by the validator and is now submitted to a third party or Regulator for review |
| Pending Review – Validation (Markit) | Project has been approved by the third party or Regulator and is now being reviewed by Markit |
| Pending Review – Validation (Customer) | Project has been rejected by the Validator and requires action by Customer |
| Validated (Pending Payment) | Invoice payment is required |

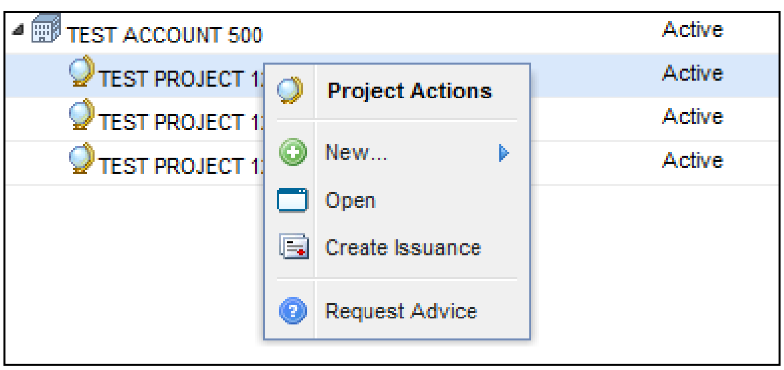
| | |
|---|---|
| Validated | Project is registered as validated |
| Verified | Verified units are issued |
| Self-Assessed | Project developer chooses to self-assess the project. No formal verification takes place. |
| Pending Review – Self Assessment (3rd Party) | Project developer submits the project for self-assessment to the third party of regulator |
| Pending Review – Self Assessment (Customer) | Third party or regulator reviews the project and sends the project back to the project developer for more information |
| Pending Review – Self Assessment (Markit) | Third party or regulator reviews the project and approves the project for Markit Ops to review |

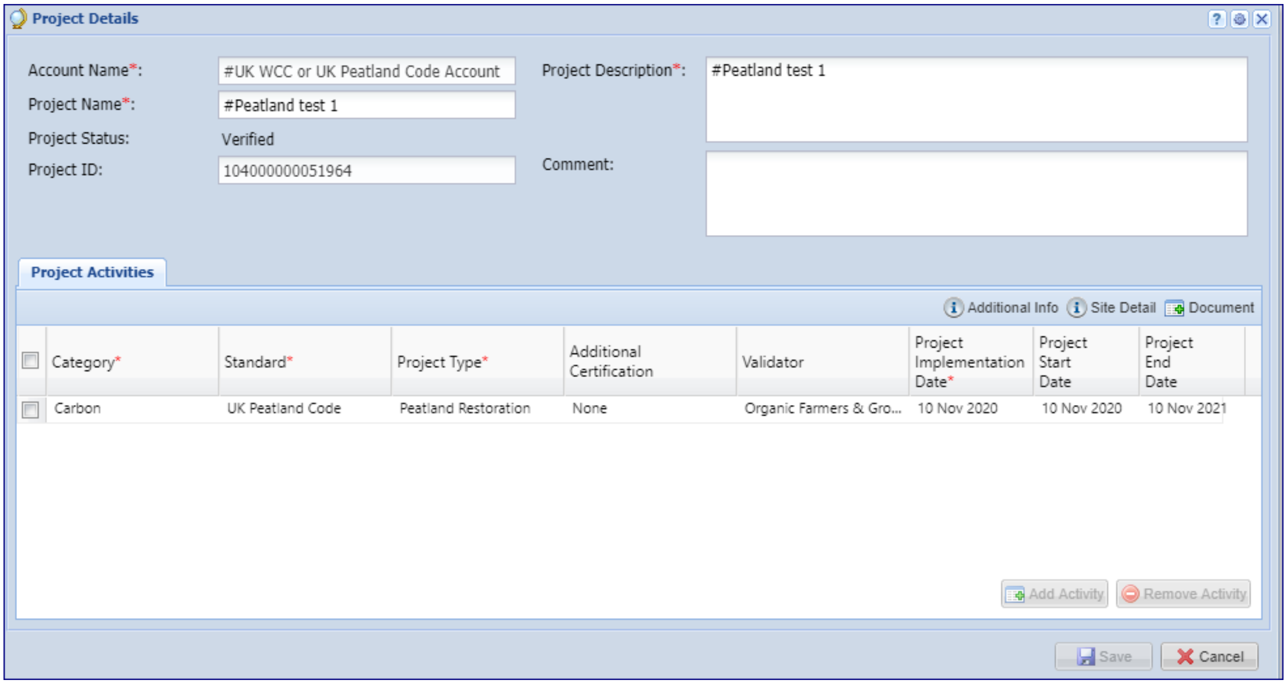
Click on the arrow next to an account to see the projects registered within the account:




- Right-click on a project to view project actions:

Double-click on a project to view all project details:





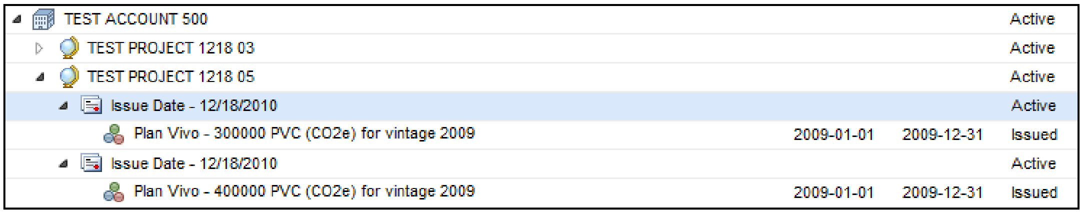

## Issuances

This window displays all issuances created within the user's account(s). This window is used to create issuances and view the status of credits submitted for issuance. Below is the summary of project statuses and what each status means to the users.

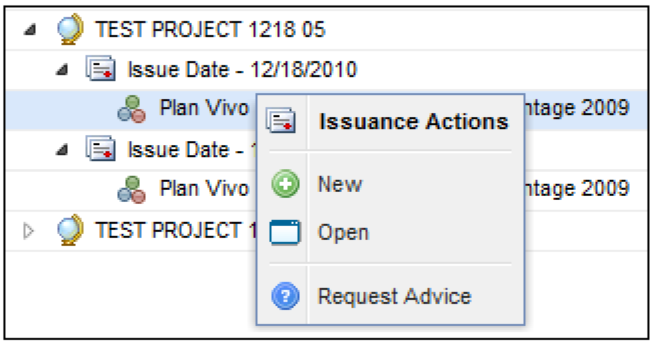
### Issuances Status

| Issuance Status | Definition |
|---|---|
| Draft | Issuance has been saved, but not submitted by user for review by IHS Markit Operations |
| Pending Review (Markit) | Issuance has been submitted to IHS Markit and is being reviewed by IHS Markit Operations |
| Pending Review (Customer) | Issuance has been reviewed by IHS Markit Operations and requires action by Customer |
| Pending Review (3rd Party) | Issuance has been submitted to a third party or regulator for review |
| Active | Issuance completed and credits listed on Registry |
| Discarded | Issuance cancelled and no longer listed on Registry |
| Pending Review (Verifier) | Issuance has been submitted to the Verifier |
| Verified | Verified Units are activated |
| Pending Payment | Issuance requires payment before it is approved |

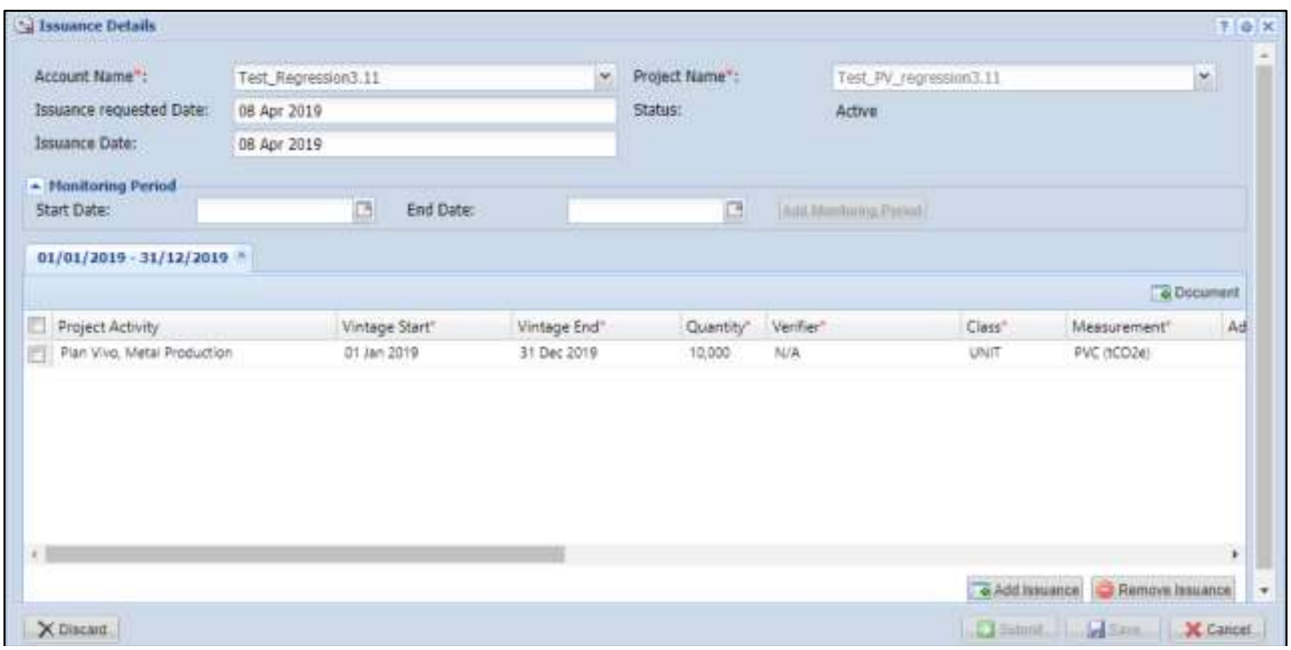
- Click on the arrow next to an account to see the projects registered within the account. Click on an arrow next to a project to view the project's issuances:




- Right click on an issuance to view issuance details and options:




- Double-click on an issuance to view all issuance details:

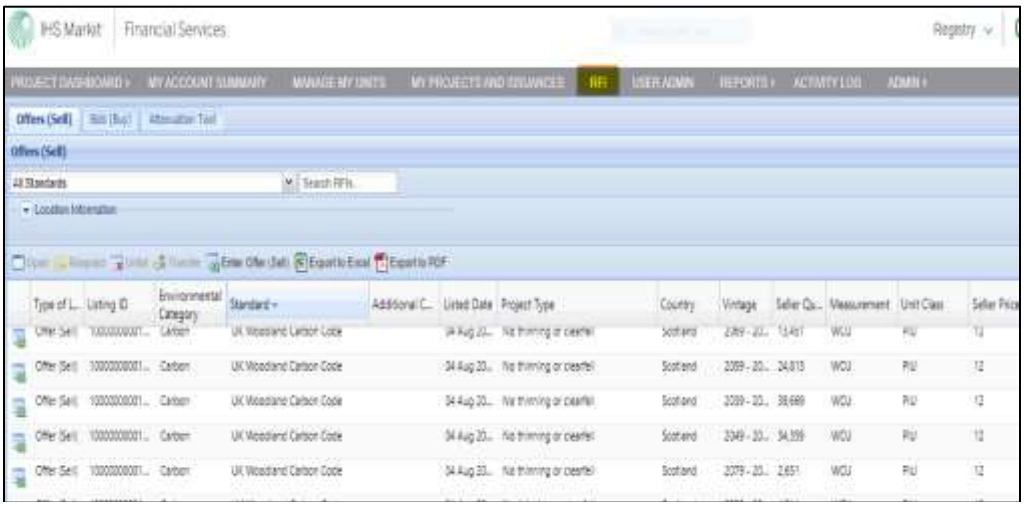


## 3.5 RFI (Request For Information)

The IHS Markit RFI Platform is an anonymous online platform for the over the counter (OTC) voluntary carbon market that displays credits available for sale or purchase including indicative quantities and price. These credits are searchable and viewable by registered sellers and buyers.

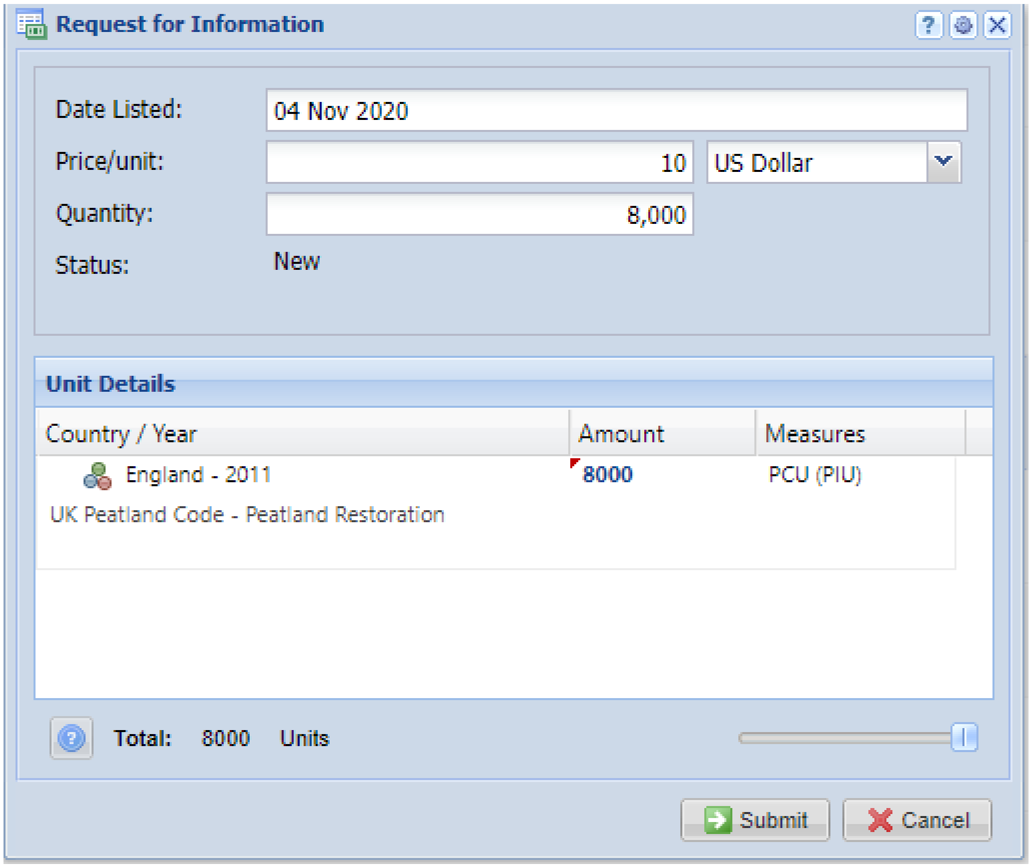
- Upon interest in any credits, the sellers or buyers can send an "Expression of Interest" to the counterparty, whereby the counterparty can permission the interaction. Introduction through the IHS Markit RFI platform then enables the two parties to discuss the terms of a potential bilateral transaction

- To navigate to the RFI page select the **RFI** tab.



## Project Developers – Listing to the RFI (if you're looking to sell credits)

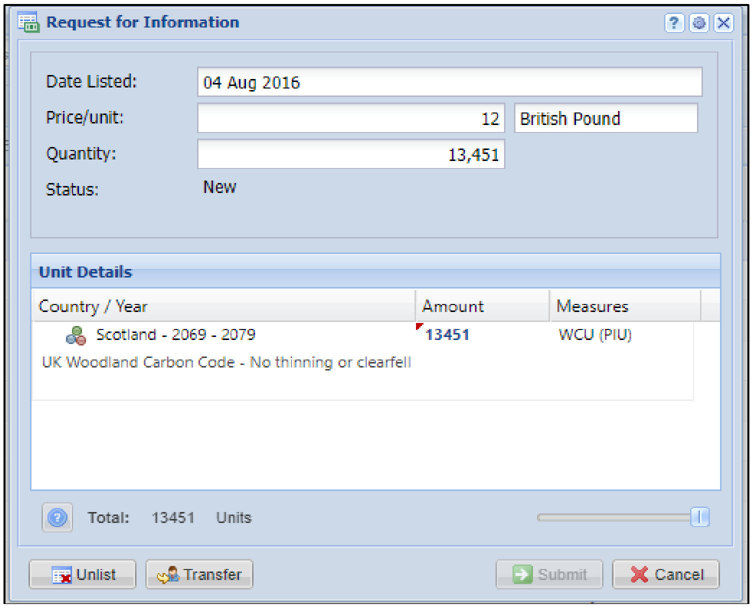
- Navigate to the Manage My Units tab.
- Select the credits you would like to list on the RFI Platform from the list of credits displayed.
    - The **Request for Information** window will appear.




- Enter the indicative quantity and price of the credits to be listed.
- Click the **Submit** button to complete the RFI listing.
- The status of the credits will change from Active to .
- Note that whilst your credits are listed on the RFI, they are not available within your account for any other action. You need to remove them from the RFI if you wish to assign or transfer them to a buyer.

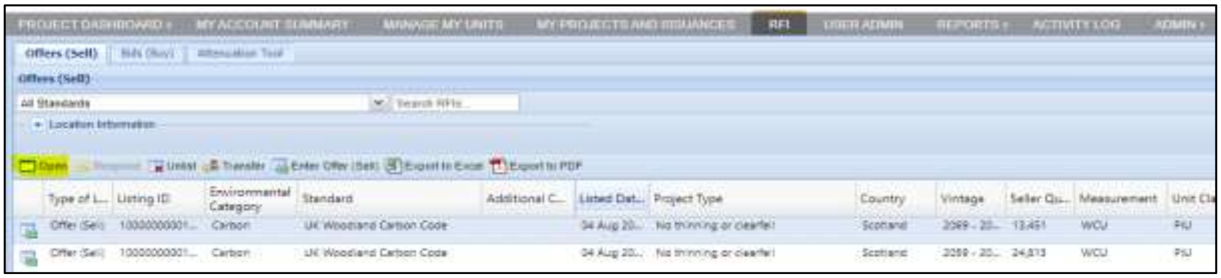
If you no longer wish to advertise your credits on the RFI platform, or you have found a buyer and want to transfer/assign/retire the credits to a buyer, then you need to 'delist' it from the RFI platform first, before you can assign/transfer/retire the credits to the buyer.

- Navigate to the Manage My Units tab to delist credits on the RFI Platform.
- Select the unit block with the status "RFI Listed".
- In the **Request for Information** window, click the **Unlist** button.

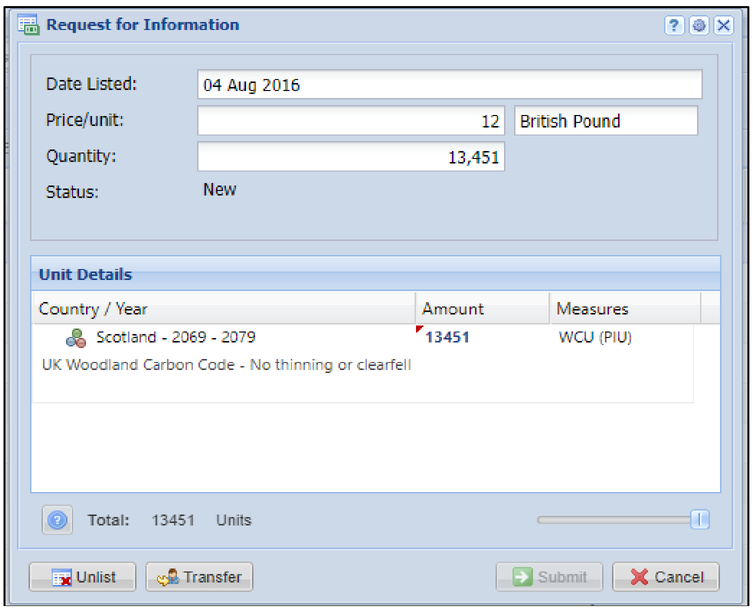

Request for Information
Date Listed:
04 Aug 2016
Price/unit:
12
British Pound
Quantity:
13,451
Status:
New
Unit Details
Country / Year
Amount
Measures
Scotland - 2069 - 2079
13451
WCU (PIU)
UK Woodland Carbon Code - No thinning or clearfell
Total:
13451
Units
Unlist
Transfer
Submit
Cancel

## Buyers – Responding to RFI listing

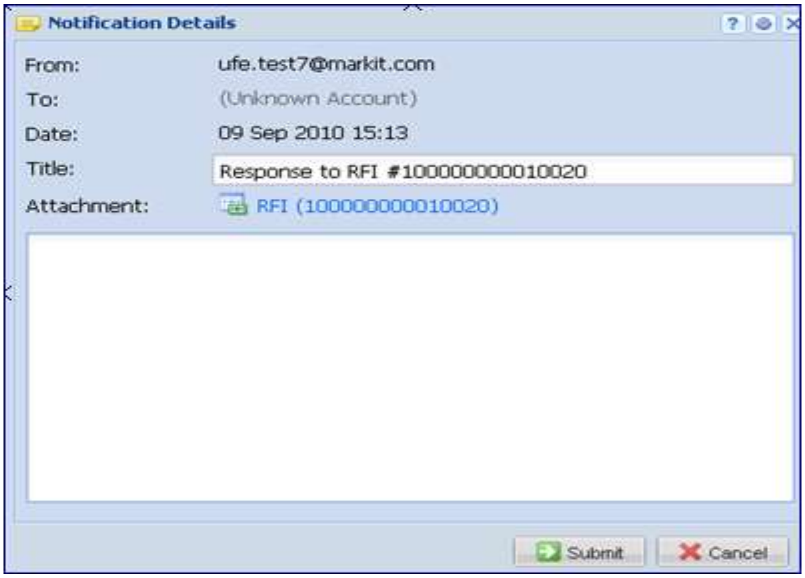
The **RFI** tab displays all listings on the RFI Platform. All listings are anonymously displayed and can be browsed by sorting the columns. If a buyer is interested in a listing, the buyer can submit an expression of interest by sending a message to the seller via the platform.



- Double-click a unit block to learn more about that offering or click the Open button.




- Click the **Respond** button to send a message of interest to the seller. Then **Submit.**


Notification Details
From:
ufe.test7@markit.com
To:
(Unknown Account)
Date:
09 Sep 2010 15:13
Title:
Response to RFI #100000000010020
Attachment:
RFI (100000000010020)
Submit
Cancel

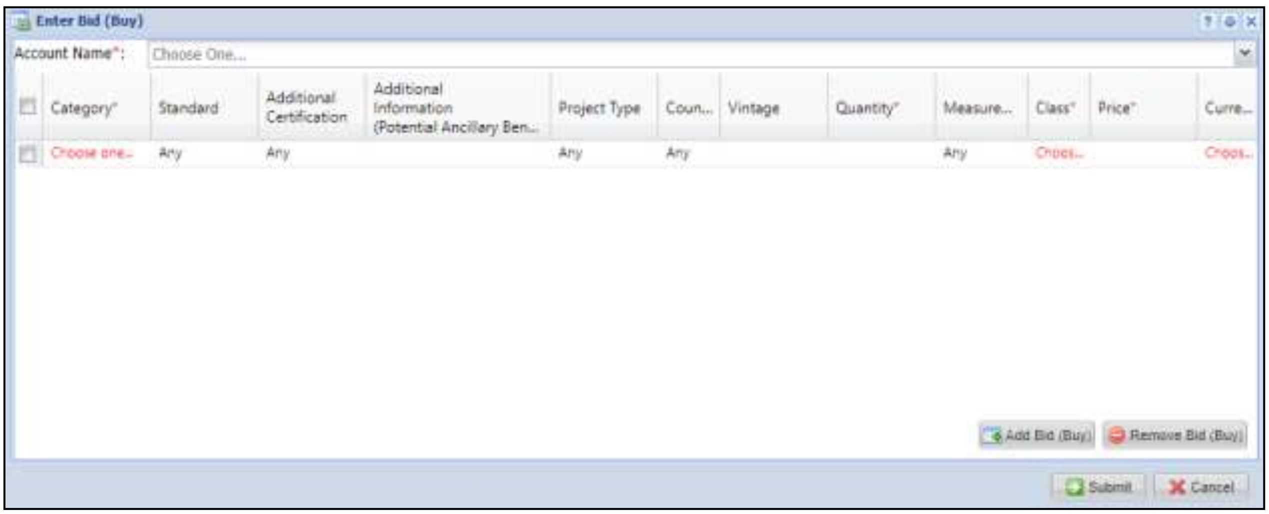
## Buyers – Submitting an RFI Bid (if you are looking to buy credits)

As a buyer, if you are looking to buy carbon credits at a certain price you can ‘submit a bid’ on the RFI platform so project developers know how many credits you are looking for, at what price.

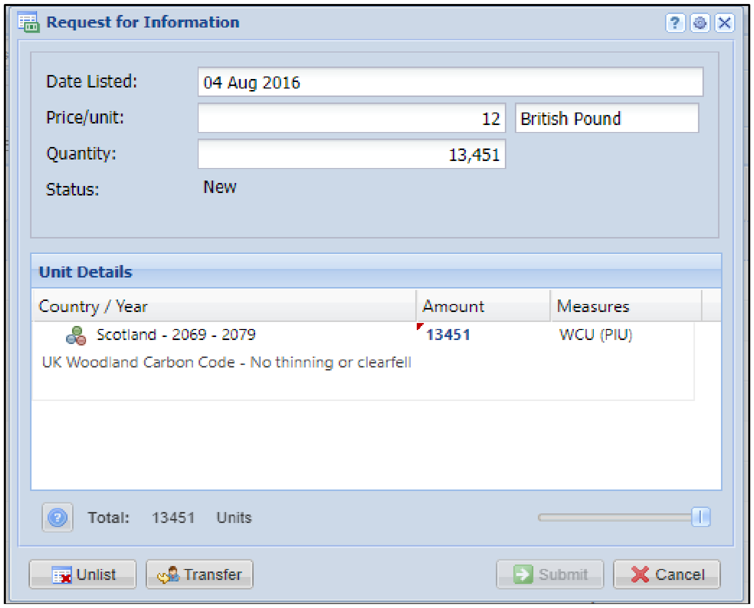
- Navigate to the RFI tab and click 

.

- Click the **Add Bid (Buy)** button then enter all applicable information in the **Enter Bid (Buy)** window and **Submit**.




- The bid listing will be displayed on the RFI page.


Request for Information
Date Listed:
04 Aug 2016
Price/unit:
12
British Pound
Quantity:
13,451
Status:
New
Unit Details
Country / Year
Amount
Measures
Scotland - 2069 - 2079
13451
WCU (PIU)
UK Woodland Carbon Code - No thinning or clearfell
Total:
13451
Units
Unlist
Transfer
Submit
Cancel

## 3.6 Reports

The Reports page is a reporting page for viewing lists of specific activities within an account.

- To use the reports page, select the tab for the activity which you wish to view (i.e. Projects, Issuances, Current Holdings, Retirements, Incoming Transfers, Outgoing Transfers, or Consolidated Report).
- Input dates into the “Start” and “End” fields.
  - Note: 01-Jan-2011 is the earliest ‘Start’ date available on the Reports tab.
  - When running a report for ‘Current Holdings’, start and end dates are not required. All current holdings will be displayed.
- Pressing the **Submit** button will display the account activity from the chosen start date to end date.


## 3.7 Activity Log

The activity log page is a reporting page for viewing all activity within an account.

- To use the Activity Log, enter dates into the “Start” and “End” fields.
- Press the **Submit** button to display the account activity from the chosen start to end date.

# Additional Information

This section provides information about additional help and how to contact IHS Markit Support and Sales.

# FAQs for Accessing the IHS Markit Registry

**1. What if I can't login?**

(i) First clear cookies and cache from the history of the browser, close the session and then try logging in again.

(ii) If you still cannot login, then reset your password by clicking on "Forgot Your Password" to reset your password.

(iii) If the issue persists, contact support@ihsmarkit.com for further help.

**2. What if I can login, but don't see the Registry in the list of products?**

Look in the upper right-hand corner of the screen for an IHS Markit product name (e.g. Registry, Commentary, Indices, Support). If this is not set to Registry, hover the cursor over product name and select Registry from the dropdown list. Note that the list is scrollable so that Registry may not appear until you scroll down. If Registry is not in the list, contact support@ihsmarkit.com and notify them that the login works, but that it is not pointing to the Registry or Registry is not appearing as one of the products.

**3. What if I can login, but don't receive session codes?**

Contact MK-EnvironmentalRegistry@ihsmarkit.com and verify that your email address is correct.

**4. What if I can login and receive repeated session codes, but still cannot access the Registry?**

Clear cookies and cache from the history of the browser, close the session and then try logging in again. If that fails, contact MK-EnvironmentalRegistry@ihsmarkit.com

**5. What if I can login and receive session codes, but do not see tabs other than My Account Summary?**

Contact MK-EnvironmentalRegistry@ihsmarkit.com saying that you can log in, but the tabs are not available other than My Account Summary.

# Contact Support

For questions not answered in this guide, please contact the IHS Markit Environmental Solutions Team:

- Email: MK-EnvironmentalRegistry@ihsmarkit.com
- Phone: +1 917-441-6668

For 24-hour support, call the IHS Markit Support Team:

| | |
|---|---|
| Americas | +1 800 447 2273 |
| Europe/Middle East | +44(0) 134 432 8300 |
| APAC | +604 291 3600 |
| Japan | +81 3 6262 188 |

For questions regarding other IHS Markit products, please contact the IHS Markit Sales Team:
+1 212 931 4910
+1 303-858-6060