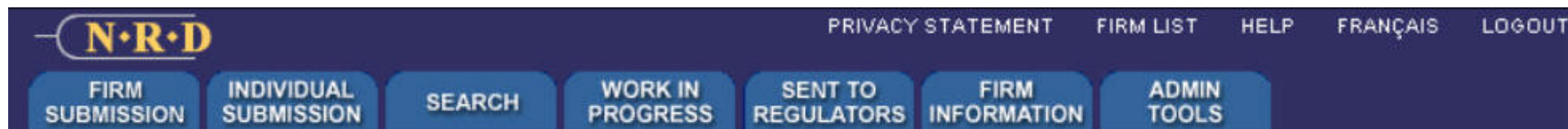


Quick-Reference Sheet – Navigation and retrieving information



Logging in

The first thing you see at www.nrd.ca is the splash page. Choose your preferred language to proceed to the login page.

Your first time logging in :

- Chief AFR – you will have received a user ID and password from the NRD administrator. You will only need to enter your PIN the first time you login.
- All AFR's – you will have received a user ID and password from your Chief AFR or AFR Administrator. The first time you login, you will be required to change your password.

After you log in, the system presents you with a Task Menu, which matches the main navigator that you will see throughout your session. If you are an AFR for more than one firm and you are using the same user ID for all, you'll see a Firm List. Choose the firm you need to work on to navigate to the Task Menu.

Problems logging in

If you make 3 unsuccessful login attempts within a 30-minute period, the system will lock you out. You have to have your password reset to regain access to the system.

Chief AFR – contact the NRD administrator to reset your password.
AFR Admin and AFRs – an AFR Admin or Chief AFR can reset your password. No one can reset their own password.

Session time-outs

If you are logged into the system but are idle for 45 minutes (i.e., you do not hit a command button like « Save & Continue » or « Search ») your session will expire and you will have to login again. This could result in lost work if you have input information but never hit the « Save & Continue » button while working, for example, on a disclosure question for an Initial Registration submission.

Need more details?

The **NRD Filer Manual** contains illustrated directions on navigation and on retrieving information on NRD. See **Chapter 6 – Navigating the NRD Website**, and **Chapter 9 – Searching for and viewing information on NRD**. For more info on Reports, see **Chapter 8 – Administrative Tools**

Need help?

Call the CDS Helpdesk at (800)219-5381 or email NRDadministrator@cds.ca

Getting around the site



- Use the **global navigator** to view the NRD privacy statement, to access Help (the system will launch a new browser window so your current session isn't interrupted), to change your language preference (doing so will log you out of the system, so save your work first), or to logout.
- Use the **main navigator** for easy navigation from task to task. The main navigator links are repeated at the bottom of every screen in white text.
- Use the **local navigator** to navigate through features like Search, Admin Tools, and through sections of submissions and permanent record information. The local navigator is unique for each of these features.

Finding information on NRD

Firm Information

- Click Firm Information on the main navigator to view your firm's current and historical registration information (Name, Head Office, Compliance Officer, registration categories, etc.).

The Search function can retrieve :

- **Individual Information** (i.e., current and historical 33-109F4 information)
- **Location Information** (Branch/Sub-Branch)
- **Firm and Individual Submission Information** (i.e., payment status, processing by jurisdiction, fee status, etc.)

Reports – use this Admin Tools feature to retrieve information according to your own criteria :

- | | |
|--|--|
| <ul style="list-style-type: none"> ▪ Reconciliation report by EFT ▪ Reconciliation report by submission ▪ List registrants ▪ List AFRs | <ul style="list-style-type: none"> ▪ Individual Permanent Record ▪ Progress report for individuals included in the data transfer |
|--|--|