

# Quick-Reference Sheet – Admin Tools

- Set Up Users
- Maintain Users
- Change Password
- Reset Password
- Revoke Access
- Resubmit Fee Payment
- Reports

## The admin tools and who can use them :

	Chief AFR	AFR Admin	AFR
Set Up Users	✓	✓	
Maintain Users	✓	✓	
Change Password	✓	✓	✓
Reset Password	✓	✓	
Revoke Access	✓	✓	
Resubmit Fee Payment	✓	✓	✓
Reports	✓	✓	✓

**Need more details?**  
See the NRD Filer Manual, Chapter 8, **Administrative Tools.**

**Need help?**  
Call the CDS Helpdesk at (800)219-5381 or email [NRDadministrator@cds.ca](mailto:NRDadministrator@cds.ca)

- Tips**
- ★ Passwords must be 6-20 alphanumeric characters (letters and numbers), must begin with a letter, and must not contain special characters (\$?& »...)
  - ★ When you set up a user, print and keep a copy of their user confirmation page. This page includes their user ID, which you must keep on record.
  - ★ You must re-assign any submissions in an AFR's Work In Progress list before you can revoke their access to the system.
  - ★ \*Set Up, Maintain, Reset Password and Revoke Access cannot be used on Chief AFR's. Such actions or changes must be communicated to the NRD administrator and cannot be effected by regulators via Admin Tools.
  - ★ It is a good security practice to change your password frequently and to memorize it rather than writing it down. At any rate, the system requires you to change your password every 13 months. **DO NOT SHARE YOUR PASSWORD WITH ANYONE.**

## QUICK HOW-TO's...

Click "Admin Tools" and choose one of the following functions:

- Set Up Users :**
- Input all relevant information for the user (name, contact information, role as AFR Admin or AFR)
  - The system will generate a user ID and a first-time password. Print the confirmation information. Keep a copy for your records and pass the information to the new user. The new user will be required to change the password at first login.

- Maintain Users :**
- Use this function to update the name and contact information for an existing AFR Admin or AFR.

- Change Password :**
- Use this function to change your own password.

- Reset Password :**
- Use this function to reset another user's password. You might need to do this if the user has forgotten their current password, or if they have been locked out of the system for making 3 unsuccessful login attempts within 30 minutes.
  - Chief AFRs who are locked-out must contact the CDS administrator to have their password reset.

- Revoke Access :**
- Use this function to permanently block a user's access to the system.

- Resubmit Fee Payment:**  
Use this function to :
- correct a default payment (e.g. submission fee to be paid through NRD was not successfully collected from your NRD account – NSF or incorrect bank info)
  - to submit additional fees directly related to a submission (e.g. late fees)

- Reports :**  
Use the following reports to manage information on your firm's Fees, AFRs and Individuals :
- Reconciliation Report by EFT (available in editable and static formats)
  - Reconciliation Report by Submission (available in editable and static formats)
  - List Registrants Report
  - List AFRs Report
  - Progress Report for Individuals included in the data transfer
  - Generate Individual Permanent Record
  - Recall Report by Number (if the system is busy or if you forget to save a report on your computer, you can retrieve the report up to 7 days after it was generated).