



Canadian Securities  
Administrators

Autorités canadiennes  
en valeurs mobilières

# *Getting Started*

*SEDAR Release 8.054  
December 2015*

**This document is designed as a quick reference guide.**

**For complete step-by-step instructions, please refer to the [SEDAR Filer's User Guide](#)**

### **Section 1: Introduction to SEDAR**

## **Getting Started**

This quick reference guide provides information on how to access and exit SEDAR, the main window of SEDAR, how to enter your user information and how to verify your access and banking authorization.

## **Accessing and Exiting SEDAR**

The SEDAR main window is the launching point for accessing modules in SEDAR. It includes a File menu from which you can select Database Maintenance, Receive Items from SEDAR Server, View Error Log and View Virus Logs as well as a Help menu for online assistance.

Only one module can be accessed from the main window at a time and you cannot close the SEDAR main window until all modules have been closed.

### **Accessing SEDAR**

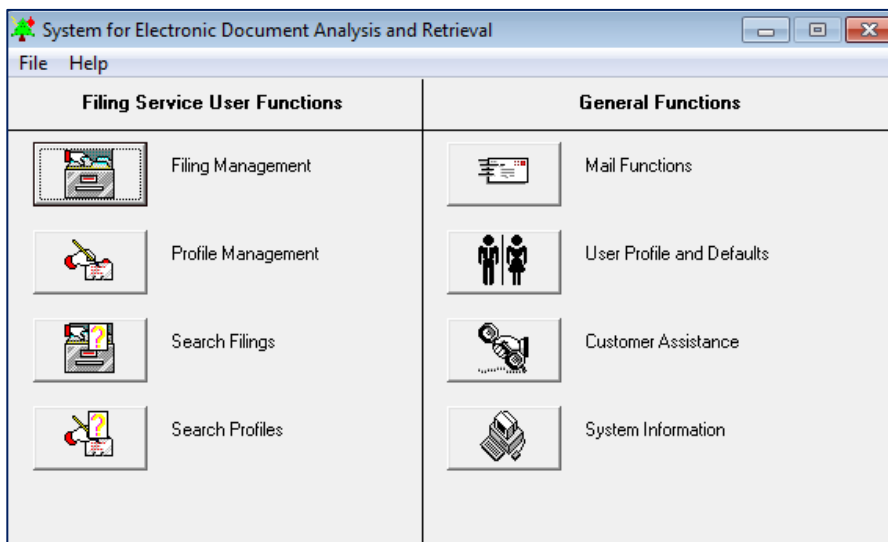
1. To connect to the SEDAR server:
  - If you are using a site-to-site Internet VPN connection, you automatically connect to SEDAR whenever you take an action that requires you to access the server.
  - If you are using a standard Internet connection (high-speed or dialup), you must connect to the SEDAR server: Start menu -> Programs -> SEDAR and click VPN Connect.
    - The SEDAR VPN Connect message displays: <Please wait while you are being connected to SEDAR> followed by <You have been connected to SEDAR>
2. To access the SEDAR software: Start menu -> Programs -> select SEDAR and click SEDAR (or) double-click the SEDAR shortcut if you created one.

### **Exiting SEDAR**

1. To close SEDAR, select Exit from the File menu on the SEDAR main window
2. To disconnect from the SEDAR server:
  - If you have a site-to-site Internet VPN connection, you are automatically disconnected when you exit SEDAR.
  - If you are using a standard Internet connection (high-speed or dialup), you must disconnect: Start menu -> Programs -> select SEDAR and click VPN Disconnect.
    - The SEDAR VPN Disconnect message displays: <Please wait while you are being disconnected from SEDAR> followed by <You have been disconnected from SEDAR>

## The main window of SEDAR

The main window of SEDAR has eight modules divided into Filing Service User Functions on the left and General Functions on the right



1. Filing Service User Functions are specific to tasks performed by filing service subscribers when processing electronic filings:
  - Filing Management: used to create and submit filings to the SEDAR server, monitor the status of filings in progress and receive formal correspondence
  - Profile Management: used to create, update and submit filer profiles
  - Search Filings: used to search for filings in the SEDAR Filings database on the SEDAR server
  - Search Profiles: used to search for profiles of electronic filers in the SEDAR Filer Profiles database on the SEDAR server
2. General Functions are common to all SEDAR users and enable informal correspondence and e-mail and provide system/user-related information:
  - Mail Functions: used to send/receive files and electronic mail, and create a local address book
  - User Profile and Defaults: used to set up your user defaults in SEDAR including language options and resetting passwords
  - Customer Assistance: where to obtain assistance information
  - System Information: where to obtain software and hardware information

## Entering your User information

On the User Profile and Defaults window, click User Information

User Information

Userid: csaf0001

Name (Last, First): TEST USER

Mailing Address

Division/department: [ ]

Street: 123 Main Street

City: Toronto

Province/State: Ontario

Subject tax:  QST  HST  Neither

Postal code/Zip Code: A1B 2C3 Country: Canada

Phone Number: 555 123-4567 Fax: [ ]

Subscriber Information

Subscriber Number: 11111112

Type of Subscriber: Filing Service Subscriber

Subscriber Name: [Filer Type] Banking Authorization

Submit Refresh Cancel Help

1. Complete the Name (Last, First) field and all fields in the Mailing Address section
  - The Userid and Subscriber information section are pre-filled as they were populated during the registration process
  - The Subject To tax indicator is determined by the Province selected
  - Click Submit to send the information to the SEDAR server
  - Click Refresh to receive the most current information on the server
  - Click Cancel to return to the User Profiles and Defaults window
  - Click Help to obtain online assistance

## Verifying your Access and Banking Authorization

On the User Profile and Defaults window, click the Banking Authorization button

Access and Banking Authorization

Subscriber Number: 11111112 Number of Signatures: 1 OK

CPA Code (FI #Transit #): 1111 Payment Limit: 1.00 Help

Account Number: 222333

Duns Number: [ ]

| User ID  | Payment Authority                 | Q.S.T. | H.S.T. | Name            |
|----------|-----------------------------------|--------|--------|-----------------|
| cdst0010 | No authorization limit            | No     | Yes    | CGI FILER, USER |
| csaf0001 | Payment Authorization not allowed | No     | No     | TEST USER       |

1. Review the information for accuracy
  - To update information, contact your CSA Service Desk at 1-800-219-5381 for assistance
  - Click OK to return to the User Information window
  - Click Help to obtain online assistance