

Adding a Secondary Filer to an Existing Project

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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 5: Assigning Secondary Filers to a Project

Adding Secondary Filers to an Existing Project

This quick reference guide provides information on how to add a secondary filer to an existing project using the Filing Management module. Also included are steps for deleting a secondary filer and if you have been granted secondary filer access, the steps for accessing the project.

About Secondary Filers

SEDAR enables the designation of one primary and several secondary filers for any filing. The primary filer is the filing service subscriber who initiates the filing. Secondary filers are all other filing service subscribers granted access to that filing.

As the primary filer, you have the ability to grant and revoke access at any time and you can add up to 50 secondary filers to a project. When adding secondary filer access however, make sure to assign them one of the following functions as the default setting is None:

- View: Enables the user to see all document titles and access, status details, fees, issuer and filer profiles, recipients and authorizations, and secondary filer access.
- Retrieve: Enables the user to download filing documents for viewing.
- Submit: Enables the user to transmit filings, make fee payments, and update cover pages

Adding a Secondary Filer

On the SEDAR main window, click Filing Management and highlight the required project

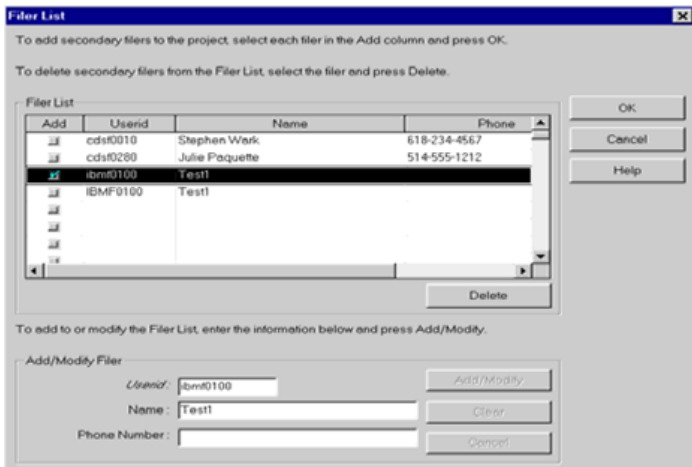
1. Go to View at the top of the window, select Secondary Filer Access
 - The Secondary Filer Access dialog box displays
 - Click Add at the bottom

Userid	Name	Phone	Current Access	New Access
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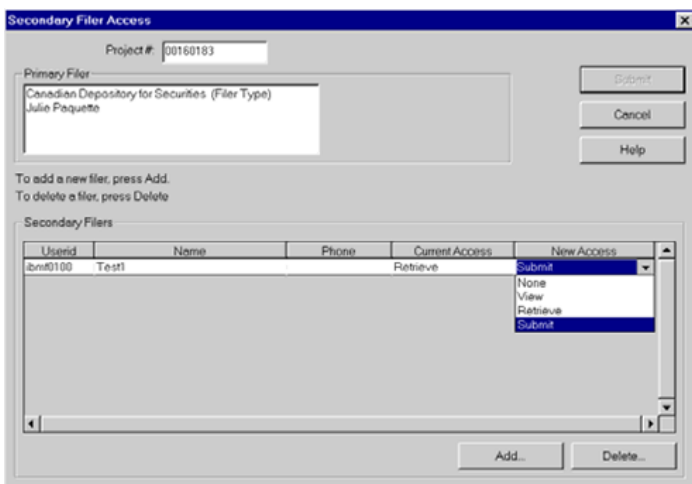
Note: If the Add button is not available, please confirm your name appears in the Primary Filer window in order to continue. For additional assistance, contact your Customer relationship Manager at 1.800.219.5381 option 3, option 1.

2. The Filer List dialog box displays

- Enter the User ID (all lowercase) and the name of the person you intend to grant secondary access to
- Click the Add/Modify button (on the right)
- The information will populate in the Filer List above
- Repeat as necessary



3. Check the box in the Add column beside the filer(s) you wish to add and click OK
4. The Secondary Filer Access dialog box redisplayes showing the selected filers and their current access (Reminder: Defaults to None)
5. To update this access, go to the New Access Column – there is a drop down menu – and select the access you would like the secondary filer to have: View, Retrieve or Submit



Note: You can click Cancel and return to the Filing Management window without making changes up to this point. The next step will commit your changes

6. Click Submit **twice** to send your changes to the server
7. The Filing Management window displays
8. Notify the secondary filer that their access has been granted

Deleting a Secondary Filer

On the SEDAR main window, click Filing Management and highlight the required project

1. Go to View at the top of the window, select Secondary Filer Access
 - The Secondary Filer Access dialog box displays
 - Click Delete at the bottom
2. The Delete Secondary Filers dialog box displays
 - Select the filer you want to delete and click OK
 - A message displays asking you if you really want to delete the selected filer, click Yes
3. The Secondary Filer Access dialog box re-displays showing the updated List of Secondary Filers
 - Click Submit **twice** to send your changes to the server
 - The Filing Management window displays
 - The secondary filer access has been deleted

Accessing a Project as a Secondary Filer

When a primary filer grants you secondary filer access to a project, remember to confirm the project number, the user ID assigned to the project and the access type that has been granted.

Note: Some filers have forgotten to update the access for the Secondary Filer from None (system default) to View, Retrieve or Submit. If this happens, secondary access will not be granted as expected and you will not have access to the project. Please re-engage the Primary Filer for assistance.

1. To download a copy of the project into your Filing management, first make sure you are logged into SEDAR with the assigned User Id (all lowercase)
2. On the Filing Management window, from the Options menu select Quick Search Inquiries
 - The Quick Search Inquiries dialog box displays
 - Click New to open the Quick Search Inquiries wizard and click Next
 - Retrieve your company's filings by: select Project Number
 - Click Next
 - Enter the project number in the Enter the Project Numbers to Retrieve field and click Next
 - On the Congratulations window, do NOT check the box to Make this my Default Refresh Inquiry
 - Click Finish followed by Refresh List
 - The Filing Management window re-displays including the new project

Note: You will need to search in your list for the new project as it will sort numerically due to a default setting in Filing Management.