

ScotiaConnect® Digital Banking

ScotiaConnect User Administration Quick Reference Guide

Table of Contents

Creating Users	2
Modifying Users	5
Recovering Users	5
For Further Assistance	7

Creating Users

In order to create a new user for ScotiaConnect, go to 'Administration', then 'User Information', and click 'Request New User'.

The screenshot shows the ScotiaConnect Administration interface. The top navigation bar includes Home, Reporting, Payments, Services, and Administration. Under Administration, there are links for User Information, User Groups, Audit Log, My Profile, Self Administration, Service Groups, and Service Information. The 'User Information' link is highlighted. In the top right corner, there is a 'Need Help?' link and a 'Request a New User' button.

Fill in the mandatory fields (marked with an *) and click 'Continue'.

You can select the group the user will belong to using the 'Group' dropdown menu. You must assign every user to a group in order for them to be able to sign in to ScotiaConnect.

The screenshot shows the 'Request a User' form. It includes a 'Print' button in the top right corner. The form contains the following fields:

- New User Details**
 - Last Name :*
 - First Name :*
 - Middle Name :
 - Job Title :
 - Department :
 - Phone :*
 - Extension :
 - E-Mail :*
 - Report Preference : PDF(FOR IE7.0 +)
 - Country Preference : Canada
 - Mother's Maiden Name or Secret Word :*
 - Language : English CA
 - Group : Unassigned

* Mandatory field

Buttons: Cancel, Continue

Note: 'Mother's Maiden Name or Secret Word' is an extremely important field. This is the only time you will see this information and you will need to provide it to your user in order for them to register.

Select the Security Token option that best meets your needs then click 'Submit' to finalize the request.

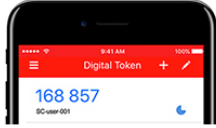
Select a Security Token for Test User

Each user needs a Security Token to sign in to ScotiaConnect.
Choose either a Digital Token OR a Physical Token for your new ScotiaConnect user. Either option can be used on both the ScotiaConnect website and mobile app.

Digital Token

☒ Select a **FREE** Digital Token

- No cost, and your new user can register for ScotiaConnect right away
- The secure iPhone app displays a 6-digit value every 30 seconds




OR

Physical Token

☐ Order a **NEW** Physical Token

- A new physical token is **\$40** (including tax and shipping), charged to your default account
- Your new user can register for ScotiaConnect once they receive it
- Simple press of its button displays a new 6-digit value usable for 30 seconds



OR

☐ Use a Physical Token your company already owns

- No cost to use or re-use an existing Physical Token
- Remember, each ScotiaConnect user needs their own token

Back
Submit

If you select 'Order a New Physical Token' you must then indicate the delivery destination. 'Business Address on file' will show the company address we have on file. Confirm it is correct before clicking 'Submit'. 'A different address' will allow you to enter an address free form. **Note:** PO. Boxes are not valid delivery addresses for physical tokens.

Deliver token to

A different address
Business address on file
A different address

Address line 1*

Address line 1

Address line 2

Address line 2

City*

City

Country*

Canada

Postal/zip Code*

Province/territory or state*

Please select

Delivery takes about 5 business days and requires a signature.

If you select 'Use a Physical token your company already owns' you can also check the availability of that token by clicking the link shown below:

☒ Use a Physical Token your company already owns

- No cost to use or re-use an existing Physical Token
- Remember, each ScotiaConnect user needs their own token


[Want to see if your Token is registered to someone?](#)

Enter the serial number and click the 'Check' button, Serial numbers are 12 digits beginning with 'GALT' in uppercase.

Is this Physical Token Available?

This check is optional, if you're not sure. Enter the serial number on the back of the Physical Token (case sensitive).

GALT12345678



You will then be told if the token is assigned to a profile or not. If it is already assigned to another user's profile, you will have the option to delete that user. Deleting the user will remove their ability to sign in to ScotiaConnect.

Warning: That Physical Token is tied to **Test User**.
You must delete this user before any new user can have it

☒ I understand if the above user is deleted, they can no longer sign in to ScotiaConnect

Once you submit the user request you will receive a confirmation message and the user will show in either 'Pending' or 'Active' status. If the user is 'Pending' a second user with approval authority must approve them. Active users can begin their registration once they receive their physical token or have installed the digital token.

User Information

Success confirmation:
You successfully added Test User, who will receive registration instructions by email. A new Physical Token will be delivered to your business address on file.

First & Last Name	User ID	Department	Group Name	User Status	Status Updated	Pending Service	Action
Scotia - Admin	Admin User		SUPER USER	Active			
Test Test			UNASSIGNED ROLE	Active			
Test User			UNASSIGNED ROLE	Active			

Item: 1 - 3 of 3

Modifying Users

To modify an existing user go to Administration then User information and click on the name of the user you wish to update.

User Information							Request a New User
First & Last Name ^	User ID	Department	Group Name	User Status	Last Sign In	Pending Service	Action
			SUPER USER	Active	Nov 06, 2017 03:20 PM		Delete
User Test			SUPER USER	Incomplete			Delete

Make the changes you wish to make then click 'Save'. Please note that changing language and report preferences will not take effect until the user signs out and back in to ScotiaConnect.

User Detail

Print

User ID

Last Name

First Name

Middle Name

E-Mail

Phone

Country Preference

Remarks

Language

User Status

Global User ID

Authorization Code

Job Title

Department

Extension

Report Preference :

Security Token Type

Group

Active

Scotia

PDF(FOR IE7.0 +)

Digital Token

SUPER USER

Cancel

Recover Credentials

Save

Recovering Users

To recover a user's password go to 'Administration' then 'User Information' and click on the name of the user you want to recover.

User Information							Request a New User
First & Last Name ^	User ID	Department	Group Name	User Status	Last Sign In	Pending Service	Action
			SUPER USER	Active	Nov 06, 2017 03:20 PM		Delete
User Test			SUPER USER	Incomplete			Delete

Click 'Recover Credentials' at the bottom of the User Details page.

Country Preference	Canada ▼	Report Preference :	PDF(FOR IE7.0 +) ▼
Remarks	<input type="text"/>	Security Token Type	Digital Token
Language	English CA ▼	Group	SUPER USER ▼
<input type="button" value="Cancel"/>		<input type="button" value="Recover Credentials"/> <input type="button" value="Save"/>	

Once you click that button you will be asked to indicate if you wish to recover the user's password, security questions or both by placing checkmarks next to the appropriate options then click 'Next'.

Recover Credentials

Check either or both of the following to recover:

☐ Password

☐ Security questions and answers

Verify the user's email address and click 'Sign & Submit'.

Confirm User Recovery

If the email address below is incorrect, select Cancel and have the user call the Contact Centre to have the email address updated. Otherwise, select 'Sign & Submit' to submit the password recovery request.

User ID

User Name fgfsdfg fdsag

User Email bgxcfh@tryt.com

Recovery Status New Recovery

Request Date 06/07/2017 14:51:08

Request By Training User

Requested By ID 008501TrainingUser

Please enter password *

Please enter your Token Value *

You will then be shown the user's details along with an alphanumeric Authorization Code or secret word. You will need to note this code and provide it to the user in order for them to finish the recovery process.

Note: You will only see the Authorization Code on this page, if you forget to note it down you can go back to the user's details.

User Detail

User Name

Last Name

First Name

Middle Name

E-Mail

User Status Active ▼

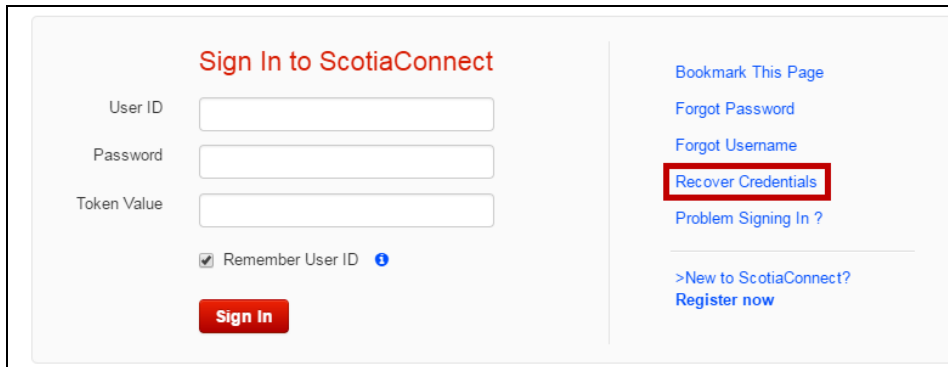
Global User ID

Authorization Code

Job Title --select-- ▼

Department

The user will receive a recovery email; they should then go to the ScotiaConnect homepage and click 'Recover Credentials'. They will enter their reference number from the email, and authorization code or secret word and if successful, be prompted to choose a new password.

A screenshot of the ScotiaConnect Sign In page. The page has a light blue background. On the left, there's a 'Sign In to ScotiaConnect' section with three input fields: 'User ID', 'Password', and 'Token Value'. Below these is a 'Remember User ID' checkbox and a 'Sign In' button. On the right, there's a list of links: 'Bookmark This Page', 'Forgot Password', 'Forgot Username', 'Recover Credentials' (which is highlighted with a red rectangle), 'Problem Signing In?', '>New to ScotiaConnect? Register now'.

For Further Assistance

Need Help?

On any ScotiaConnect page, you will find a 'Need Help?' link. Clicking that link will provide targeted help topics relevant to the page you're currently viewing.

[Need Help?](#)

Online Customer Support

- Select the Help option at the top right of your browser and select to open our 'Online Customer Support' knowledge base. A new window will be displayed and you may type your question.

Tutorial Videos

- The Tutorial Video link at the top right of your screen will open the Online Resource Centre with videos, documents and more to help you find answers to your questions regarding Scotiabank's products and services.

Technical Support Help Desk - Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.

- 1-800-265-5613 - Toll-free number within North America
- 416-288-4600 - Local Toronto area customers
- 416-701-7351 - Fax
- (800) 463-7777 - pour le service en français
- Email: hd.ccebs@scotiabank.com. Your email will be answered within 24-48 business hours.
- To book product training, please send an email to gtb.training@scotiabank.com

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