## ScotiaConnect® Digital Banking

# Adding Users and Setting User Permissions Quick Reference Guide

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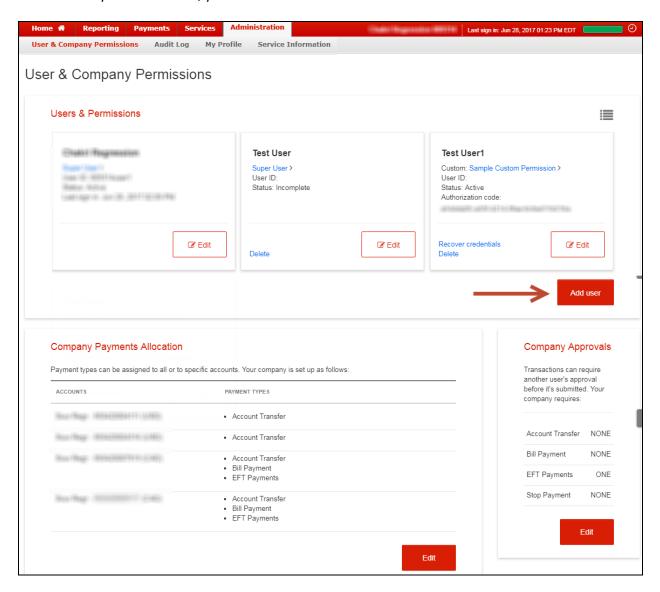


Note only Super Users and users with administration privileges can complete the steps outlined in this guide.

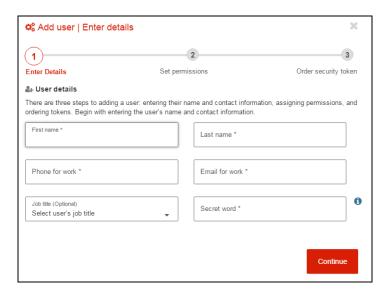
## **User Permissions**

## **Adding New Users**

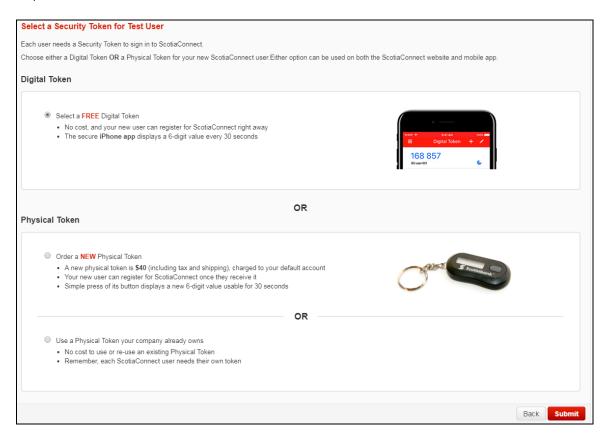
To add new users to ScotiaConnect, click on the Administration tab at the top of the ScotiaConnect menu. Below your list of users, you will see the button to add a new user.



To add a user, please enter all the required information. The secret word is to be shared with the new user only. It will be used to confirm their identity when calling us for support.



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

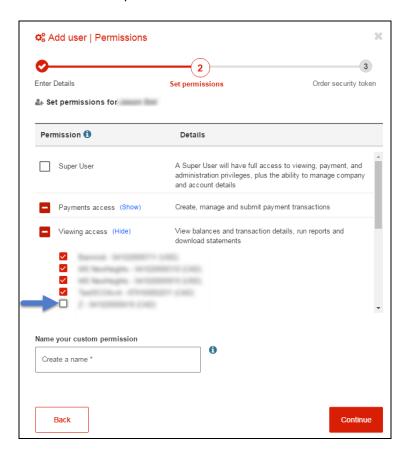


If you select 'Order a New Physical Token' the company address will be displayed, confirm it is correct before clicking 'Submit'.

Once you click submit you will receive a confirmation message and the user will show in 'Active' status.

## **Assigning Permissions to New Users**

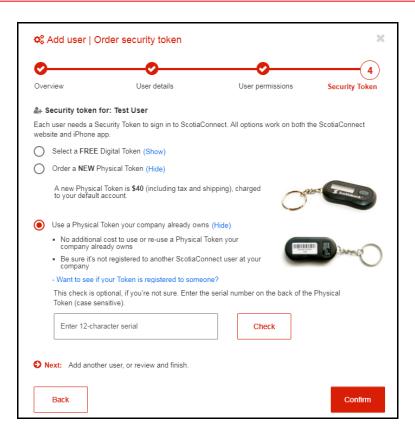
After clicking 'Continue' you will need to assign permissions for the user. Permissions with a 'Show' text link next to their name can be expanded to customize account access.



#### **Custom Permissions**

If you choose to make changes to the Viewing and Payment Access preset permissions, you will be creating a custom permission. For example, if you remove an account from Viewing Access, you will be prompted to enter a custom name for this access. You can then assign this same custom permission to any other users going forward.

Next, specify what type of token the user will login with. If you select a Physical Token you will need to specify whether you need a new one to be shipped or if you will use an existing token. If a new token is being shipped your company address will display, if there is an error or you wish to ship to a different address select 'A different Address' (PO Boxes are not valid shipping addresses). If you opt to use an existing token you can enter the serial number from the back of the token to check whether the token is currently in use, and if so, delete the old user.



Once you click 'Save & close' you will be redirected to the Administration screen. An email will be sent to the user with information on how to register for ScotiaConnect.

## **Edit Existing Users**

To edit an existing user, locate the user from the 'User & Company Permissions" screen and click the 'Edit' icon to make changes to their details and/or permissions.



### 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
- To book product training, please send an email to gtb.training@scotiabank.com

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