

# ScotiaConnect Administration

Reference Guide



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## BEFORE YOU BEGIN

This guide will explain all the administrative functions in ScotiaConnect. Only users with access to administration can perform these tasks. **There are two versions of administration in ScotiaConnect.** Simple Approval which allows a single approver for payment services, and Enhanced Approval which allows up to three approvers and 5 amount tiers for payment services.

This guide covers the simple administration experience, for more information about enhanced administration the guide can be found [here](#).

## USER ADMINISTRATION

### Adding users

Adding a user to ScotiaConnect allows them to register and login to ScotiaConnect. You will also assign them user permissions as part of the process so that they can access services.

Go to **Administration, User and Company Permissions** then click **Add user**.

The screenshot shows the ScotiaConnect Administration interface. The top navigation bar includes 'Overview', 'Accounts', 'Payments', 'Reporting', 'Services', and 'Administration' (which is underlined). Below this, there are sub-navigation options: 'User & Company Permissions' (highlighted in red), 'Audit Log', and 'Service Information'. The main content area is titled 'User & Company Permissions' and contains a section titled 'Users & Permissions' with a grid icon in the top right corner. Below this is a table with the following columns: NAME, USER ID, PERMISSION, LAST SIGN IN, STATUS, and ACTIONS. The table lists two users: Jane Smith (Super User) and John Smith (Custom: Analytics). The ACTIONS column for each user includes 'Edit', 'Recover credentials', and 'Delete'. A red box highlights the 'Add user' button in the bottom right corner of the table area.

NAME	USER ID	PERMISSION	LAST SIGN IN	STATUS	ACTIONS
Jane Smith		Super User		Active with Digital Token	<a href="#">Edit</a> <a href="#">Recover credentials</a> <a href="#">Delete</a>
John Smith		Custom: Analytics		Active with Digital Token	<a href="#">Edit</a> <a href="#">Recover credentials</a> <a href="#">Delete</a>

Fill in the mandatory fields and click **Continue**. The email address is where the registration email will be sent, and the temporary secret word is used for authentication purposes and should be provided to the new user.



**Add user | Enter details**

1 Enter details | 2 Set permissions | 3 Order security token

**User details**

There are three steps to adding a user: entering their name and contact information, assigning permissions, and ordering tokens. Begin with entering the user's name and contact information.

First name \* Robert  
Last name \* Smith  
Phone for work \* 4444444444  
Email for work \* robert.smith@test.ca  
Job title (Optional) Select user's job title  
Temporary secret word \* Scotiabank

**Set permissions for: Robert Smith**

Permission	Details
<input type="checkbox"/> Super User	A Super User will have full access to viewing, payment, and administration privileges, plus the ability to manage company and account details
<input checked="" type="checkbox"/> Payments access (Show)	Create, manage and submit payment transactions
<input checked="" type="checkbox"/> Viewing access (Show)	View balances and transaction details, run reports and download statements
<input type="checkbox"/> Admin access (Show)	
<input type="checkbox"/> Custom: Accounting view (Show)	

Next, select the permissions the user will need. Permissions with a **Show** link next to them let you specify which accounts the user can access.

If you make changes to the **Viewing access** or **Payment access** permissions you will need to give the customized permission a name before you can continue. Custom permissions can also be used for other users. Once you have set the permissions click **Continue**.

Permission	Details
<input type="checkbox"/> Super User	A Super User will have full access to viewing, payment, and administration privileges, plus the ability to manage company and account details
<input checked="" type="checkbox"/> Payments access (Show)	Create, manage and submit payment transactions
<input checked="" type="checkbox"/> Viewing access (Show)	View balances and transaction details, run reports and download statements
<input type="checkbox"/> Admin access (Show)	
<input type="checkbox"/> Custom: Accounting view (Show)	

Back Continue

Select the Security Token type for the user, enter your password and token value, then click **Submit** to finalize the request. An email will be sent to all Super Users, informing them that the New User request has been submitted.



Each user needs a Security Token to sign in to ScotiaConnect. All options work on both the ScotiaConnect website and the mobile app.

Select a **FREE** Digital Token ([Show](#))  
 Order a **NEW** Physical Token ([Show](#))  
 Use a Physical Token your company already owns ([Show](#))

Additional Authentication Required

Current Password  Token Value

[Back](#) [Save & close](#)


**Note:** If you select **Order a New Physical Token** confirm the delivery address before clicking **Submit**. ‘A different address’ will allow you to enter a custom address. PO. Boxes are not valid delivery addresses for physical tokens.

To reuse a physical token, you must first verify if it is registered with another user by selecting **Want to see if your Token is registered to someone?** Enter the 12 digit serial number (beginning with “GALT”) and click **Check**. 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.

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?](#)

**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).  
  

Once you submit the new user request you will be taken back to the **User & Company Permissions** screen where the new profile will be visible. Note the Authorization code and share it with the new user so they can complete their registration.

User & Company Permissions

Users & Permissions

NAME	USER ID	PERMISSION	LAST SIGN IN	STATUS	ACTIONS
Jane Smith		Super User		Active with Digital Token	<a href="#">Edit</a> <a href="#">Recover credentials</a> <a href="#">Delete</a>
John Smith		Custom: Analytics		Active with Digital Token	<a href="#">Edit</a> <a href="#">Recover credentials</a> <a href="#">Delete</a>
Robert Smith		Payments & Viewing	Authorization code: 04eaa3f5-f834-407c-bb7f-cd509c41aba6	Active with Digital Token	<a href="#">Edit</a> <a href="#">Recover credentials</a> <a href="#">Delete</a>

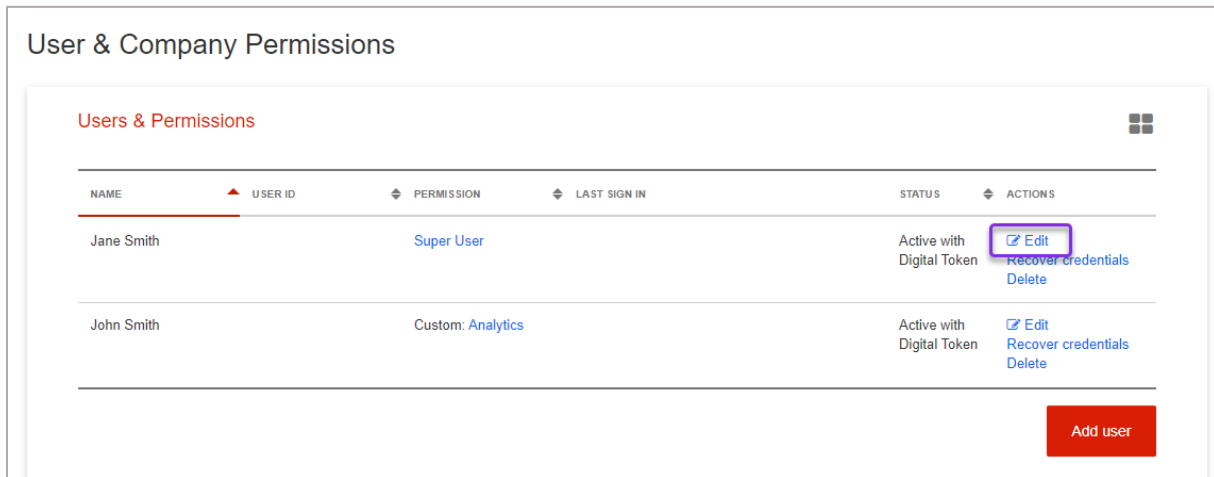
[Add user](#)

## Modifying or Deleting Users

Modifying users will let you change their user details and permissions. For example, if you get a new service, it would not be added to all users by default. You would need to edit any users you wanted to grant access to those new services.

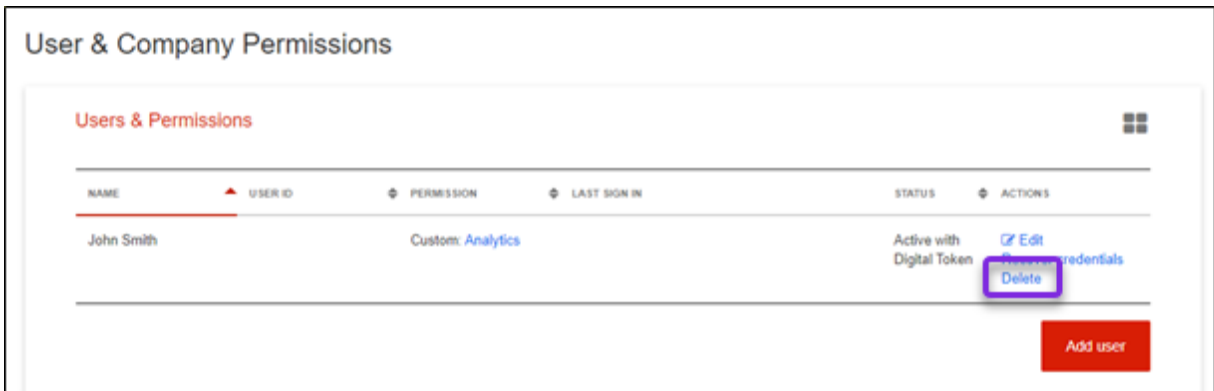


Go to **Administration, User & Company Permissions** then click **Edit**.



You can change the user details or user permissions using the same steps as creating a user detailed [here](#). Click **Save & Close** to finalize the changes. An email will be sent to all members of the Super User group, informing them that the user has been edited.

Deleting a user is done from the **Administration, User & Company Permissions** page as well. Simply click the Delete option under the Actions column, beside the user's name. An email will be sent to all Super Users, informing them that the user has been Deleted.

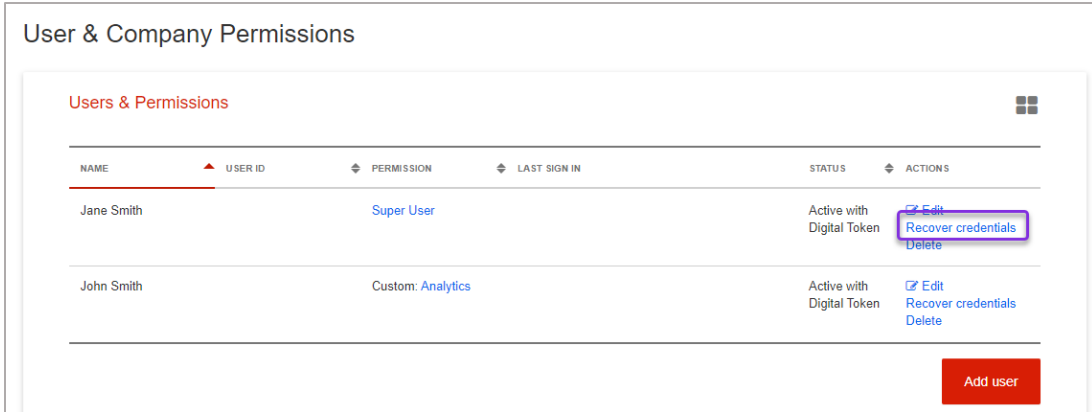


## Recovering a User

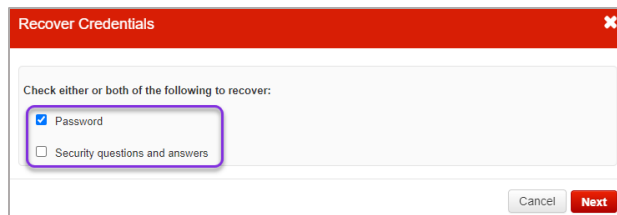
User recovery lets you reset someone's password or security questions, use this to help users who have forgotten their login information.

Go to **Administration, User & Company Permissions** and click **Recover Credentials** for the user you to recover.

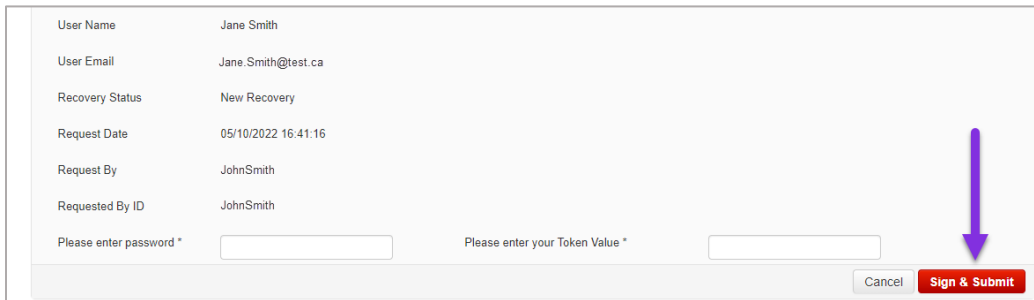




Choose if you are recovering the user’s password, security questions, or both; then click **Next**.



Verify the user’s email then enter your password and token value. Click **Sign & Submit** when complete. A recovery email will be sent to the user explaining the next steps.



## COMPANY ADMINISTRATION

### Setting Company Approvals

You can choose whether approvals are required for certain functions in ScotiaConnect. You would edit these settings if you wanted to either add or remove approval authority for those functions.

Go to **Administration, User & Company Permissions** then click **Edit** under the Company Approvals section.



### Company Payments Allocation

Payment types can be assigned to all or to specific accounts. Your company is set up as follows:

ACCOUNTS	PAYMENT TYPES
THE BANK OF NO - 476960012345 (CAD)	<ul style="list-style-type: none"> <li>Bill Payment</li> <li>Wire Payments</li> </ul>
THE BANK OF NO - 476960012346 (USD)	<ul style="list-style-type: none"> <li>Account Transfer</li> <li>Wire Payments</li> </ul>
THE BANK OF NO - 476960012347 (USD)	<ul style="list-style-type: none"> <li>Account Transfer</li> <li>Wire Payments</li> </ul>
THE BANK OF NO - 476960012348 (CAD)	<ul style="list-style-type: none"> <li>Account Transfer</li> <li>EFT Payments</li> <li>Wire Payments</li> </ul>

[Edit](#)

### Company Approvals

Transactions can require another user's approval before it's submitted. Your company requires:

Account Transfer	ONE
Bill Payment	NONE
Stop Payment	ONE
EFT Payments	NONE
Wire Payments	NONE

[Edit](#)

Select One or None for each transaction type the click **Save & close**.

**GBP Scotiabank Training Simplified | Approval levels per payment** ✕

**Set payment approval levels**

Approvals act as another layer of security for your payments. Select the number of approvals needed for each payment type at your company.

Payment Type	Number of approvals required <span style="font-size: 0.8em;">?</span>
Account Transfer	<input type="radio"/> None (0) <input checked="" type="radio"/> One (1)
Bill Payment	<input checked="" type="radio"/> None (0) <input type="radio"/> One (1)
Stop Payment	<input type="radio"/> None (0) <input checked="" type="radio"/> One (1)
EFT Payments	<input checked="" type="radio"/> None (0) <input type="radio"/> One (1)
Wire Payments	<input checked="" type="radio"/> None (0) <input type="radio"/> One (1)

[Save & close](#)



## Assigning Payment Types to your Accounts

You can specify which accounts can be used for your payment types in ScotiaConnect. This can be used to add payment services to a new account. You can also remove the ability for an account to be used for a type of payment.

Go to **Administration** then **User & Company Permissions** and click **Edit** under the Company Payments Allocation section

**Company Payments Allocation**

Payment types can be assigned to all or to specific accounts. Your company is set up as follows:

ACCOUNTS	PAYMENT TYPES
THE BANK OF NO - 476960012345 (CAD)	<ul style="list-style-type: none"><li>• Bill Payment</li><li>• Wire Payments</li></ul>
THE BANK OF NO - 476960012346 (USD)	<ul style="list-style-type: none"><li>• Account Transfer</li><li>• Wire Payments</li></ul>
THE BANK OF NO - 476960012347 (USD)	<ul style="list-style-type: none"><li>• Account Transfer</li><li>• Wire Payments</li></ul>
THE BANK OF NO - 476960012348 (CAD)	<ul style="list-style-type: none"><li>• Account Transfer</li><li>• EFT Payments</li><li>• Wire Payments</li></ul>

**Edit**

**Company Approvals**

Transactions can require another user's approval before it's submitted. Your company requires:

Account Transfer	ONE
Bill Payment	NONE
Stop Payment	ONE
EFT Payments	NONE
Wire Payments	NONE

**Edit**

The accounts will be listed and will have checkmarks if all available payment types are enabled or a dash if some are disabled. Click **Show** next to any of the accounts to see a list of the available payment types and check/uncheck them as needed. When you've finished modifying the settings click **Save and close**.

**Accounts & payments**

Choose the types of payments that can be done through each account at your company.

Account	Assign Payments ⓘ
THE BANK OF NO - 476960012345 (CAD)	<input checked="" type="checkbox"/> All payments <b>(Hide)</b> <input type="checkbox"/> Account Transfer <input checked="" type="checkbox"/> Bill Payment <input checked="" type="checkbox"/> Wire Payments ⓘ
THE BANK OF NO - 476960012346 (USD)	<input checked="" type="checkbox"/> All payments <b>(Show)</b>
THE BANK OF NO - 476960012347 (USD)	<input checked="" type="checkbox"/> All payments <b>(Show)</b>
THE BANK OF NO - 476960012348 (CAD)	<input checked="" type="checkbox"/> All payments <b>(Show)</b>

**Save & close**



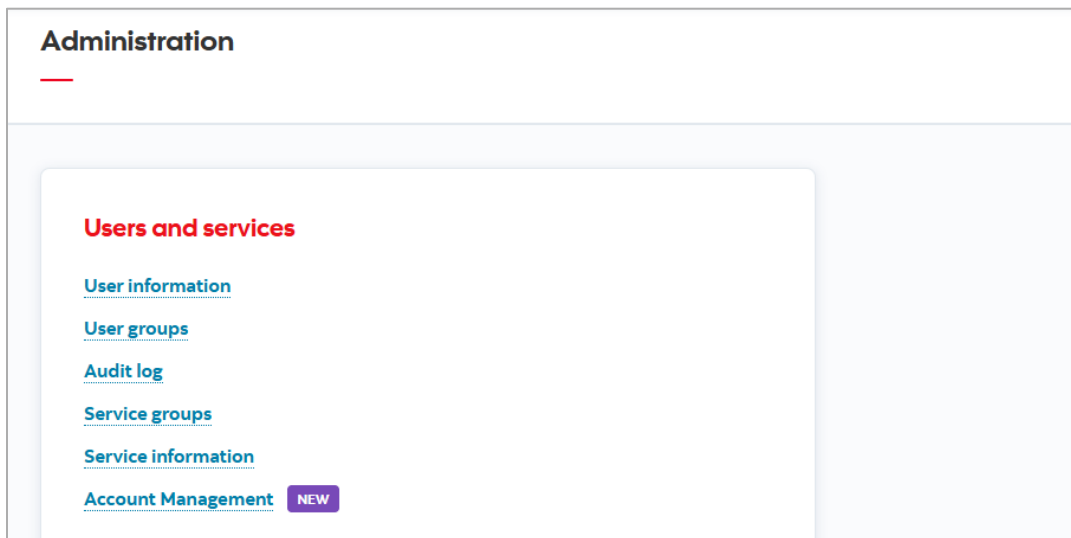
**Note:** Some payment types may be greyed out. If they are, this means those payment types cannot be modified in ScotiaConnect and you must speak with your Scotiabank representative to make any changes.

## VIEWING AND EDITING ACCOUNT INFORMATION

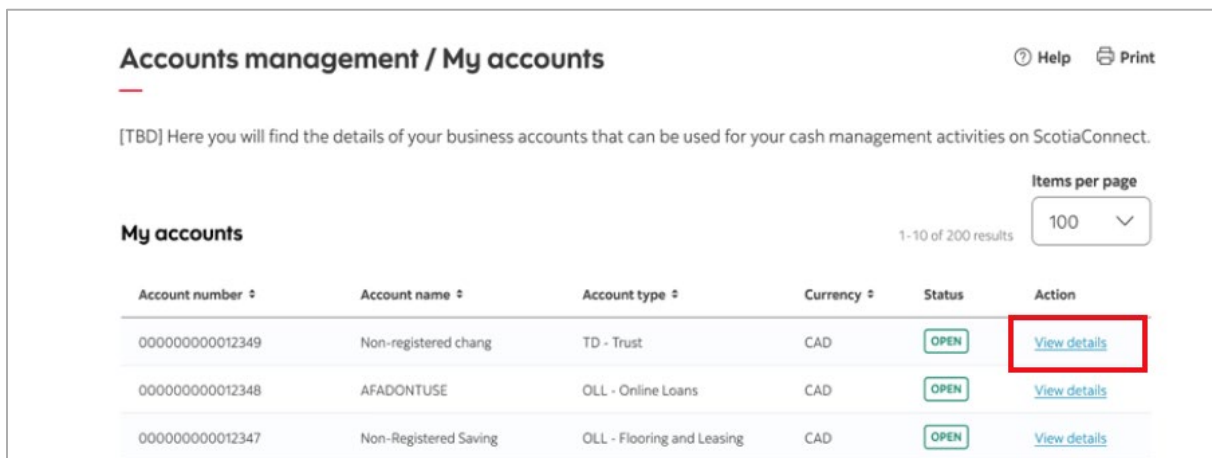
You can view information about how an account is setup in ScotiaConnect. This can be useful to:

- Check if an account is added to your ScotiaConnect profile.
- See the services that have been assigned to each account.
- Rename an account.
- Change the account transfer limits for each account.

Go to **Administration**, then click **Account Management**.



Click **view details** next to an account to see more information about it.



On the details page you can see the services that have been assigned to the account as well as other information.



## Manage account details

Help Print

### HKL

DDA(00059 00567 15)

Services

Online GICs

Interac e-Transfer

Wire Payments



Balance and Transactions

International Money Transfer

Account Transfer

OPEN

### Account details

Account number	00059 00567 15	Statement option	-
Account name	HKL 	Payment office	Toronto
Account division	- 	Account country	TODO
Account type	DDA	Services	Online GICs,Interac e-Transfer,Wire Payments,Balance and Transactions,International Money Transfer,Account Transfer
Account currency	CAD		
Status	Open		

### Service - related account information

#### Transaction limits

Transfer limits - debits ⓘ	\$9,999,999,990.00 CAD daily   \$9,999,999,990.00 CAD per transfer 
Transfer limits - credits ⓘ	\$9,999,999,990.00 CAD daily   \$9,999,999,990.00 CAD per transfer 
Wire limit ⓘ	\$999,999,999.99 CAD daily
Wire totals today	\$0.00 CAD
Real estate payments limit	\$0.00 CAD daily
Real estate payments today	\$0.00 CAD

#### Additional account information



ICI name	-
Consolidated cash plan	-

## Editing an account name

To edit the account name click the pencil icon.




### Account details

Account number	801599907912	Statement option	Paperless
Account name	Basic account one 	Payment office	Toronto
Account division	- 	Country of account	Canada
Account type	DDA	Services	Wire payments Account Transfer Bill payment Balance and Transactions etc
Account currency	CAD		
Available balance	\$999,999,999.99		

Enter a new name and click **Save**.

0090 16

STESTREG 

Statement option: -

Payment office: Toronto

Account country: TODO

×

**Edit - account name**

Account name

HJL MMSTESTREG

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Save

Cancel



## FOR FURTHER ASSISTANCE

### Need Help?

In the footer of any page in ScotiaConnect, you will find a **Help Centre** link.



Clicking that link will take you to a resource page with documents, videos, webinars and guided tutorials. There is also a knowledge base of Frequently Asked Questions.

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

- 1-800-265-5613 - Toll-free number within North America
- 1-416-288-4600 - Local Toronto area customers
- 1-800-463-7777 - pour le service en français
- 1-800-320-3396 - para servicio en español
- Email: [hd.ccebs@scotiabank.com](mailto:hd.ccebs@scotiabank.com). Your email will be answered within 24-48 business hours.

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