

# ScotiaConnect® Electronic Banking

## ScotiaConnect Administration Quick Reference Guide

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## Creating Users

In order to create a new user for ScotiaConnect, click on the 'Administration' tab then click on 'User Information':



On the page you will need to click the 'Request New User' button. You will be prompted to fill in all the necessary fields related to the new user.

### Request a User

Print

It may take up to 5 business days for the user to be added to the system.

Last Name :*	<input type="text"/>	Middle Name :	<input type="text"/>
First Name :*	<input type="text"/>	Department :	<input type="text"/>
Job Title :	--select--	Extension :	<input type="text"/>
Phone :*	<input type="text"/>	Report Preference :	EXCEL
E-Mail :*	<input type="text"/>	Mother's Maiden Name or Secret Word	<input type="text"/>
Country Preference :	Canada	Group :	Unassigned
Language :	English CA		

\* Mandatory fields

Cancel **Submit**

**Note:** Mother's Maiden Name or Secret Word is a mandatory 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.

Once you have filled in all the mandatory fields you can click the submit button. The user will sit in 'Requested' status until Scotiabank has completed the request. If the user is in 'Pending' status, another user with administrative entitlements must approve them. A user in 'Pending' status will not be created by Scotiabank until they are approved.

Once the status of the user changes from 'Requested' to 'Active' the registration email has been sent and their implementation has been completed. Please note that the user should be placed into a User Group in order to gain access to ScotiaConnect once they have registered.

## Modifying Users

If you need to change information related to a user you can click on User Information and you will be presented with a list of your users.

### User Information

[Request a New User](#)

First & Last Name	User ID	Department	Group Name	User Status	Status Updated	Pending Service	Action
<a href="#">user 1</a>			UNASSIGNED	Requested	08/14/2013		<a href="#">delete</a>
<a href="#">user 2</a>			UNASSIGNED	Requested	03/10/2016		<a href="#">delete</a>
<a href="#">user 3</a>			SUPER USER	Active	03/02/2016	EFT Payments-S0070040001 Wire Payments-S0070040001	<a href="#">approve services</a>
<a href="#">user 4</a>	0070040001		SUPER USER	Active			
<a href="#">user 5</a>			SUPER USER	Active		EFT Payments-S0070040001 Wire Payments-S0070040001	<a href="#">approve services</a>
<a href="#">user 6</a>	0070040001		SUPER USER	Active			
<a href="#">user 7</a>			SUPER USER	Active			
<a href="#">user 8</a>	0070040001		SUPER USER	Active			

Once you click on the name of the user it will open the details and allow you to make changes to the user's information. After the changes have been made, select the 'Save' button to save your changes. Please note that changing language and report preferences will not take effect until the user signs out and back in to ScotiaConnect.

### User Detail

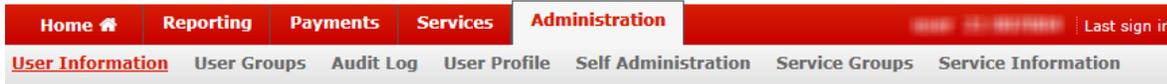
[Print](#)

User Name	<input type="text" value="user 4"/>	User Status	<input type="text" value="Active"/>
Last Name	<input type="text" value="4"/>	Global User ID	<input type="text"/>
First Name	<input type="text" value="user"/>	Authorization Code	<input type="text"/>
Middle Name	<input type="text"/>	Job Title	<input type="text" value="Account Manager"/>
E-Mail	<input type="text" value="hasi.ra@gmail.com"/>	Department	<input type="text"/>
Phone :*	<input type="text" value="(123) 123-"/>	Extension :	<input type="text" value="243324243"/>
Country Preference :*	<input type="text" value="Canada"/>	Report Preference :	<input type="text" value="PDF"/>
Remarks	<input type="text"/>	Group	<input type="text" value="SUPER USER"/>
Language	<input type="text" value="English CA"/>		

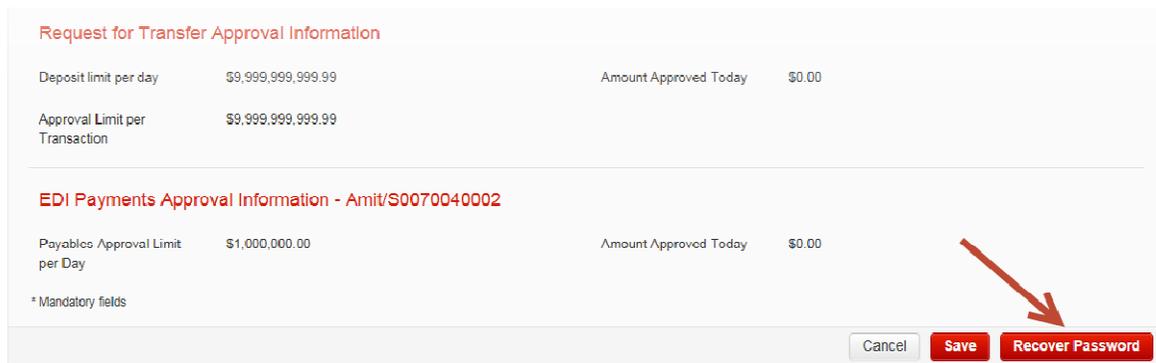
[Bill Payment Approval Information](#)

## Recovering Users

As a user with administration access, you have the ability to recover passwords of other users (reset the password) as well as reauthorize new users when they fail to register within the 30 days. In order to initiate a recovery, click on 'Administration' from the main ScotiaConnect page then 'User Information'.



Click on the name of the user you want to recover. The User Detail page will open and there will be a 'Recover Password' button at the bottom of the page.



Once you click that button you will be given a confirmation screen ensure the user's email address is correct then type in your login password and click 'Sign & Submit' in the top left corner of the screen.

### Confirm User Password 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	****
User Email	****@****.com
Recovery Status	New Recovery
Request Date	
Request By	
Requested By ID	
Please enter password *	<input type="password"/>
Please enter your Token Value *	<input type="text"/>

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	<input type="text"/>	User Status	Active <input type="checkbox"/>
Last Name	<input type="text"/>	Global User ID	<input type="text"/>
First Name	<input type="text"/>	Authorization Code	<input type="text"/>
Middle Name	<input type="text"/>	Job Title	--select-- <input type="checkbox"/>
E-Mail	<input type="text"/>	Department	<input type="text"/>

Once the user receives the recovery email, they can complete the recovery by clicking the 'Recover Password' link on the ScotiaConnect login screen. On the 'Recover Password' screen, they must enter the reference number included in the email along with their authorization code or secret word (see top of the page).

### Sign In to ScotiaConnect

User ID

Password

Token Value

Remember User ID 

**Sign In**

[Bookmark This Page](#)

[Forgot Password](#)

[Forgot Username](#)

[Recover Password](#)

[Problem Signing In ?](#)



## Creating & Modifying User Groups

To create a new user group or modify an existing one click on the 'Administration' tab then click 'User Groups' from there a list of your existing groups will show.



[Need Help?](#)

**User Groups** Entitlement Report **Add Group**

Group Name	Users Belonging to each Group	Pending Services	Setup Date	Last Updated Date	Action
<a href="#">SUPER USER</a>	<input type="text" value="SUPER USER"/>	<input type="text"/>	04/04/2013	05/11/2016	
<a href="#">Group1</a>	<input type="text"/>	<input type="text"/>	04/27/2016	04/27/2016	<input type="button" value="delete"/>
<a href="#">Group2</a>	<input type="text"/>	<input type="text"/>	04/27/2016	04/27/2016	<input type="button" value="delete"/>
<a href="#">Group3</a>	<input type="text"/>	<input type="text"/>	04/28/2016	04/28/2016	<input type="button" value="delete"/>

To create a new group, click on the 'Add Group' button on the right side of the page. You will be prompted to select a name for the group then select the service privileges you want the group to be able to access.

### User Group Information - Privileges

User Group Name \*

\* Mandatory field

**Users assigned to the group:**

The users below belong to this Group. Use the Add/Remove Users from Group button to add and remove users.

**Services assigned to the group:**

The users above have access to the privileges listed below. Remember, when adding a service to a group, all functions applicable to the selected service will automatically be enabled. If you do not want this group to have access to any particular functions within a service, you must deactivate these functions on the "User Group Information - Service Privilege" Details screen.

Click on any Service Privilege below, to view/update the underlying Service Privilege Details.

<input type="checkbox"/>	Service Privileges	Hours of Operation	Description of Privilege
<input checked="" type="checkbox"/>	<a href="#">Balance and Transactions</a>	00:00 - 23:59	This service provides the ability to view real time account balance and transaction information.
<input checked="" type="checkbox"/>	<a href="#">Account Transfer</a>	07:30 - 23:00	This service provides the ability to make same currency and cross currency transfers between your CAD and USD accounts.
<input type="checkbox"/>	<a href="#">Online Loan Transfers</a>	06:00 - 20:00	This service provides the ability to make a payment to, and draw funds from certain types of loans.

For each service selected, you can further administer group access by clicking on the name of the service privilege which will open the User Group – Service Privilege Detail window (see below). From this new window you can indicate which accounts the group can access for that function, if they have approval authority and even which specific functions they can access.

User Group Information - Service Privilege Details

User Group Name	Group Name		
Service Name	Bill Payment	Hours	07:30 - 20:00 Eastern Time
Approval Authority	<input checked="" type="checkbox"/>		

Cancel **Continue**

Approval settings belonging to the Bill Payment service

Approver:	Must be a Different User	Number of Approvals:	1
Approval Limit per Day per User:	\$ 999999999.99		
Approval Limit per Transaction per User:	\$ 999999999.99		

Functions belonging to the Bill Payment service

The functions below are associated with this service. Place a check mark in each box to allow access.

Assign	Function	Assign	Function
<input checked="" type="checkbox"/>	Business Taxes	<input checked="" type="checkbox"/>	Bill Payment History
<input checked="" type="checkbox"/>	Bill Payment Maintenance	<input checked="" type="checkbox"/>	Bill Payment One Time
<input checked="" type="checkbox"/>	Bill Payment Transaction	<input checked="" type="checkbox"/>	Bill Payment Import

Accounts belonging to the Bill Payment service

The accounts below are associated with this service. Place a check mark in each box to allow access to the account when using this service.

	Account Number	Account Name	Currency	Account Type
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>			CAD	DDA
<input checked="" type="checkbox"/>			CAD	UDA

You can modify existing groups through a similar method but instead of clicking ‘Add Group’ you can click on the name of an existing group to see a list of the users in the group and the service privileges assigned to it.

## Service Approvals

If you have services that require approval you can approve access to them based on how the service is setup. All services that require approval can be assigned by one user but must be approved by a second. Whether that user is in the same group as the approver or not is a function that can be indicated at the time of implementation. If a service approval is not completed, the user(s) within that group will not have access to the service.

User Groups

Entitlement Report **Add Group**

Group Name	Users Belonging to each Group	Pending Services	Setup Date	Last Updated Date	Action
SUPER USER	<input type="text"/>	<input type="text"/>	04/04/2013	05/11/2016	
<a href="#">Group</a>	<input type="text"/>	Request for Transfer	04/27/2016	05/11/2016	<a href="#">Approve</a> <a href="#">delete</a>

In order to approve a pending service you must go to 'Administration' then 'User Groups' then click the 'Approve' link next to the group with pending services. You will get a confirmation and the service will disappear from the box under the 'Pending Services' column.

## Creating/Modifying a Service Group

In order to create a new Service Group go under the 'Administration' tab then click 'Service Groups' You will see a button at the bottom entitled 'Add Service Group'.

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**ScotiaConnect® Electronic Banking**

Home Reporting Payments Services **Administration** Last sign in: Apr 11, 2016 12:50 PM EDT

User Information User Groups Audit Log My Profile Self Administration **Service Groups** Service Information

[Need Help?](#)

**Service Group Information** [Print](#)

Service Group Name	Service Group ID	Status	Action
<a href="#">Service Group</a>	S0070040001	Active	<a href="#">Select Action</a> <a href="#">Go</a>
<a href="#">Service Group</a>	S0070040002	Active	<a href="#">Select Action</a> <a href="#">Go</a>
<a href="#">Service Group</a>	S0070040003	Inactive	<a href="#">Select Action</a> <a href="#">Go</a>
<a href="#">Service Group</a>	S0070040004	Inactive	<a href="#">Select Action</a> <a href="#">Go</a>
<a href="#">Service Group</a>	S0070040005	Active	<a href="#">Select Action</a> <a href="#">Go</a>
<a href="#">Service Group</a>	S0070040006	Active	<a href="#">Select Action</a> <a href="#">Go</a>

**Add Service Group**

Step 1: Once you've clicked the button it will allow you to begin creating a service group. Name the group, indicate the Payment Service Types you want assigned and then click 'Continue'

**Add Service Group** Step 1 of 2   Print

**Assign a Service Group Name and select Payment Service Types:**

Service Group Status: Inactive

Service Group Name\*:

Payment Service Types\* [Check All](#) [Uncheck All](#)

- EFT Payments
- Wire Payments
- EDI Payments
- Remittance Advice

Unique Payment Number:  Yes  No

Used for Special Vendors:  Yes  No

\* Mandatory field

Continue Cancel

Step 2: You will then need to define how each payment service you've assigned to the Service Group is setup, the service privileges and the approval limits.

**Add Service Group** Step 2 of 2   Print

**Define EFT Payment Attributes:**

Service Group Name: New Service Group

Service Name: EFT Payments

**Approval settings belonging to the EFT Payments service**

Approval of Templates with "0" Pre-approved Amount

Approval Required: No Number of Approvals: 0

**Payables**

Select Number of Tiers:

Tiers	From Amount	To Amount *	Number of Approvals *
1	<input type="text" value="\$0.00"/>	<input type="text" value="\$100,000.00"/>	<input type="text" value="1"/>
2	<input type="text" value="\$100,000.01"/>	<input type="text" value="\$1,000,000.00"/>	<input type="text" value="2"/>

**Receivables**

Select Number of Tiers:

Tiers	From Amount	To Amount *	Number of Approvals *
1	<input type="text" value="\$0.00"/>	<input type="text" value="\$1,000,000.00"/>	<input type="text" value="0"/>

\* Mandatory field

**Functions belonging to the EFT Payments service**

The functions below are associated with this service. Place a check mark in each box to allow access.

[Check All](#) [Uncheck All](#)

Assign	Function	Assign	Function
<input checked="" type="checkbox"/>	EFT Payment History		
<input checked="" type="checkbox"/>	Submit EFT Payments		
<input checked="" type="checkbox"/>	Online EFT Payments		
	<input checked="" type="checkbox"/> - One Time EFT Payments		
	<input checked="" type="checkbox"/> - EFT Payments from Templates		
	<input checked="" type="checkbox"/> - Modify EFT Payments Created by Other Users		
<input checked="" type="checkbox"/>	Delete EFT Payments		
<input checked="" type="checkbox"/>	Payables		
<input checked="" type="checkbox"/>	Receivables		
<input checked="" type="checkbox"/>	Template Maintenance		
	<input checked="" type="checkbox"/> - Create Templates		
	<input checked="" type="checkbox"/> - Delete Templates		
	<input checked="" type="checkbox"/> - Approve Templates		
	<input checked="" type="checkbox"/> - Modify Templates Created by Other Users		
<input checked="" type="checkbox"/>	Pending EFT Payments		
<input checked="" type="checkbox"/>	Enable EFT Payments		
<input checked="" type="checkbox"/>	Disable EFT Payments		

You will also assign the agreement numbers the Service Group will have access to, if you have more than one. This is found at the bottom of the screen. Click 'continue' to proceed to the next step. You will need to repeat this for each payment service type you selected from step 1 above.

**Agreements belonging to the EFT Payments service**

The agreements below are associated with this service. Place a check mark in each box to allow access.

[Check All](#) [Uncheck All](#)

Assign	Agreement Number	Agreement Name	Currency	Receivables Settlement Account	Payables Settlement Account
<input checked="" type="checkbox"/>	<a href="#">XXXXXXXXXX</a>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CAD	XXXXXXXXXX	
<input checked="" type="checkbox"/>	<a href="#">XXXXXXXXXX</a>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CAD	XXXXXXXXXX	
<input checked="" type="checkbox"/>	<a href="#">XXXXXXXXXX</a>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CAD	XXXXXXXXXX	
<input checked="" type="checkbox"/>	<a href="#">XXXXXXXXXX</a>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CAD	XXXXXXXXXX	XXXXXXXXXX

Once you've set all the payment service parameters you will be presented with a final confirmation screen.

**Add Service Group** Print 

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Service Group Status	Inactive
Service Group Name	New Service Group
Payment Service Types	<input checked="" type="checkbox"/> EFT Payments <input checked="" type="checkbox"/> Wire Payments
Unique Payment Number	No
Used for Special Vendors	No

You can review the basic parameters of the Service Group you've created go back to modify any selections and once you are satisfied click 'Save' on the right of the screen.

In order to modify a service group you've already created from the Service Group screen you will need to **deactivate the Service Group first**. If you have pending payments within that service group, you must complete those payments (submit or delete) prior to deactivating the service group.

▼ + <span style="background-color: #ccc; padding: 2px;">New Service Group</span>	S0070040006	Active	<div style="border: 1px solid #ccc; padding: 2px;">             Select Action  <span style="background-color: #0070c0; color: white; padding: 2px;">Deactivate</span>              Modify           </div>	<input type="button" value="Go"/>
--	-------------	--------	--	-----------------------------------

Once it has been deactivated you can select the 'Modify' option from the drop down menu. You will then be taken back to the same screens you see when creating a Service Group and can make whatever alterations you require.

## Assigning a Service Group

Service Groups are assigned to User Groups from the 'User Group' selection under the 'Administration' tab.

**User Group Information** [Need Help?](#)

Item: 1 - 2 of 2

Group Name	Users Belonging to each Group	Pending Services	Setup Date	Last Updated Date	Action
SUPER USER	token 1 token 2 600081609 user 2		04/04/2013	11/20/2013	
Group Name		Bill Payment	04/11/2016	04/11/2016	[approve] [delete]

Click on the User Group in question and then you will be able to assign one or more Service Groups to it. Service Groups are found at the bottom of the page. You will also configure how Payment Services are setup within each Service Group for that User Group. To do this, click on the service

privilege type (example 'EFT Payments'). It is important to setup the service privileges for each payment type in order to add important features such as approval levels and service functions to the users that will be in this user group.

**Service Groups assigned to the test group:**

Click on a Service Group Name to view the Service Privileges. Click on a Service Privileges to view or edit the details.

<input type="checkbox"/>	Service Group Name	Service Group ID
<input checked="" type="checkbox"/>	▼ + <a href="#">EFT Payments</a>	S0070040001
<input checked="" type="checkbox"/>	▼ - <a href="#">Wire</a>	S0070040002

Assign	Scotiabank Service	Hours of Operation	Description Privilege
<input checked="" type="checkbox"/>	<a href="#">EFT Payments</a>	02:00 - 23:59	This service allows users to do EFT Payments.
<input type="checkbox"/>	<a href="#">Wire Payments</a>	00:00 - 23:59	This service provides the ability to send wire payment instructions directly to the bank from your PC. Please note applicable wire payment cut-off times in the User Guide.
<input type="checkbox"/>	<a href="#">EDI Payments</a>	02:00 - 23:59	This service allows user to do EDI Payments
<input type="checkbox"/>	<a href="#">Remittance Advice</a>	00:00 - 23:59	This service provides the ability to send Remittance Advices

Once you have selected the service groups and configured all the services within each one you will need to save the User Group to finalize the changes.

## For Further Assistance

### Need Help?

On ScotiaConnect, you may use the 'Need Help?' In order to obtain information about the specific menu.

[Need Help?](#)

### Online Customer Support

- You may select the Help option at the top right corner of your browser and select 'Online Customer Support' – a new window will be displayed and you may type your question.



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ScotiaConnect® Electronic Banking

**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](mailto:hd.ccebs@scotiabank.com). Your email will be answered within 24-48 business hours.
- To book product training, please send an email to [gtbgics.training@scotiabank.com](mailto:gtbgics.training@scotiabank.com)

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