ScotiaConnect® Electronic Banking

ScotiaConnect Administration
Quick Reference Guide

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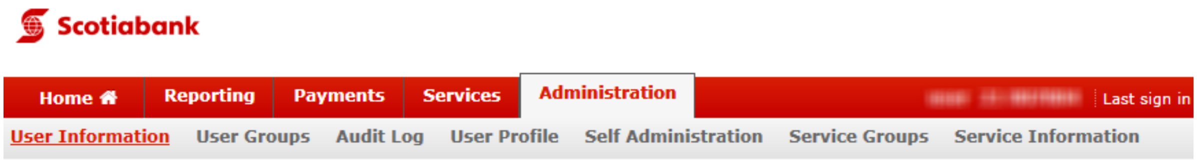
Version 1.1

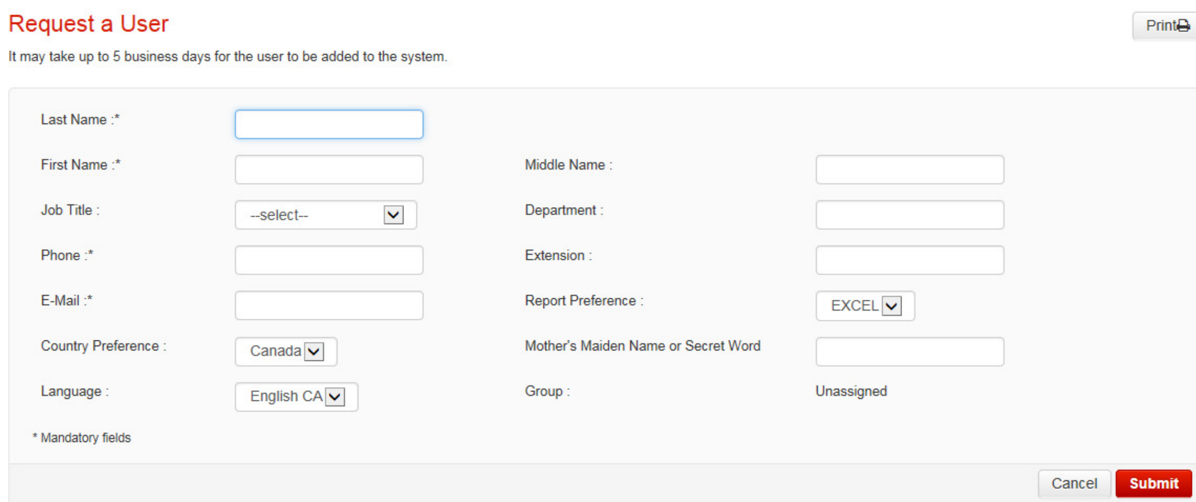
Scotiabank®

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.



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
[illegible]			UNASSIGNED	Requested	08/14/2013		delete
[illegible]			UNASSIGNED	Requested	03/10/2016		delete
[illegible]			SUPER USER	Active	03/02/2016	EFT Payments-S0070040001 Wire Payments-S007004000	approve services
[illegible]	[illegible]		SUPER USER	Active			
[illegible]			SUPER USER	Active		EFT Payments-S0070040001 Wire Payments-S007004000	approve services
[illegible]	[illegible]		SUPER USER	Active			
[illegible]			SUPER USER	Active			
[illegible]			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

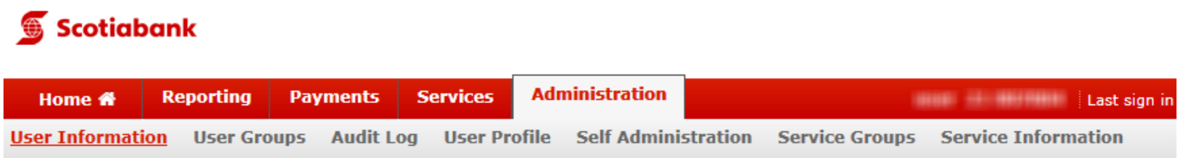
Print

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

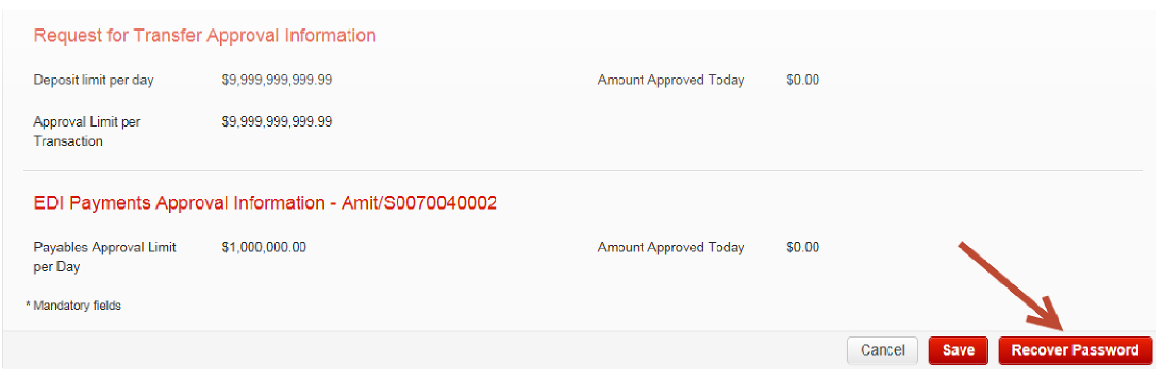
Bill Payment Approval Information

Recovering Users

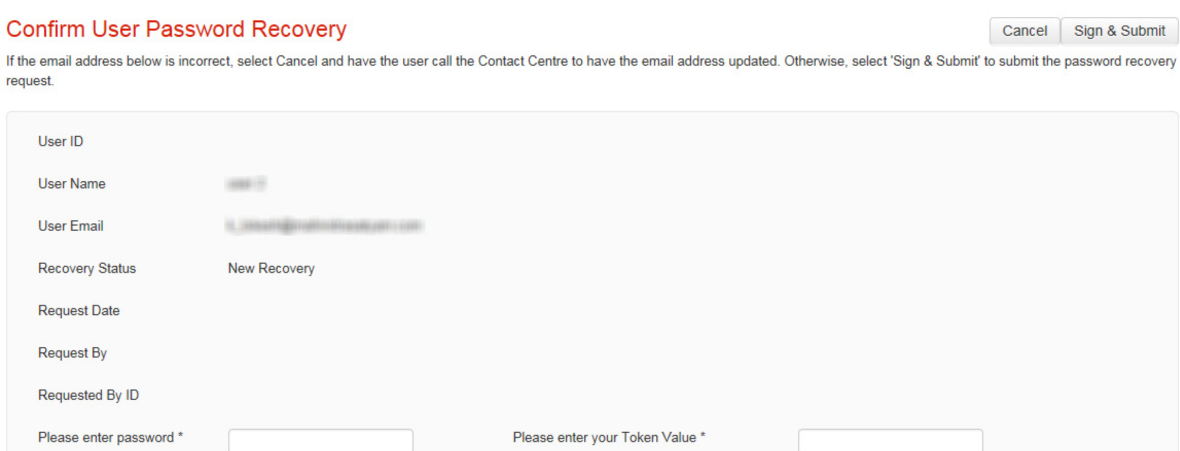
As a user with administration access, you have the ability to recover passwords of other users (reset the password) as well as reauthorize new users when they fail to register within the 30 days. In order to initiate a recovery, click on 'Administration' from the main ScotiaConnect page then 'User Information'.



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.



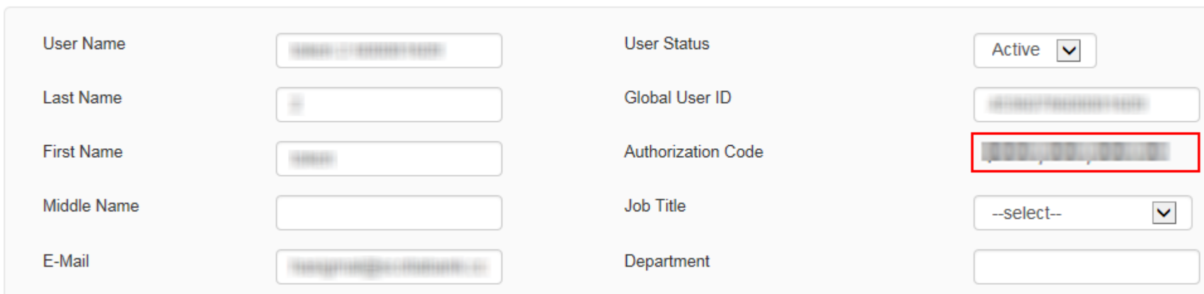
Once you click that button you will be given a confirmation screen ensure the user's email address is correct then type in your login password and click 'Sign & Submit' in the top left corner of the screen.



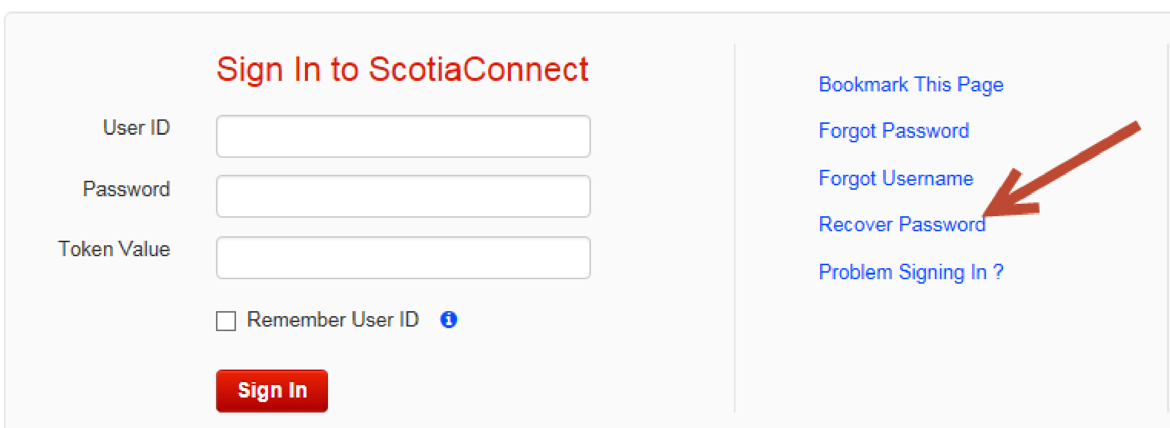
You will then be shown the user's details along with an alphanumeric Authorization Code or secret word. You will need to note this code and provide it to the user in order for them to finish the recovery process.

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

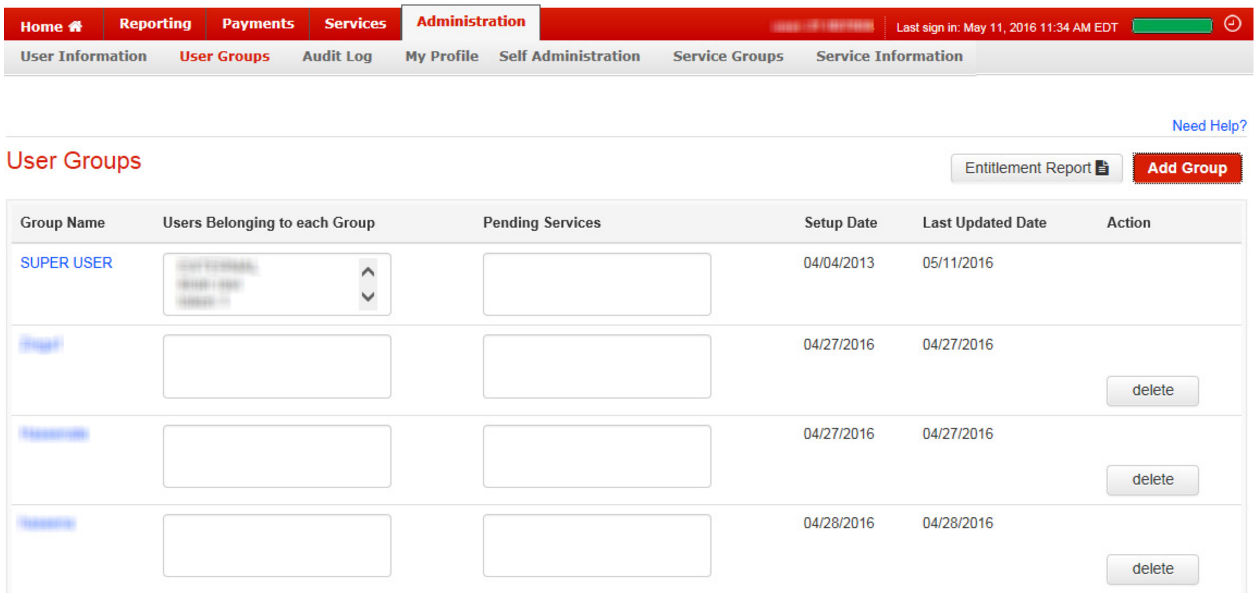


Once the user receives the recovery email, they can complete the recovery by clicking the 'Recover Password' link on the ScotiaConnect login screen. On the 'Recover Password' screen, they must enter the reference number included in the email along with their authorization code or secret word (see top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

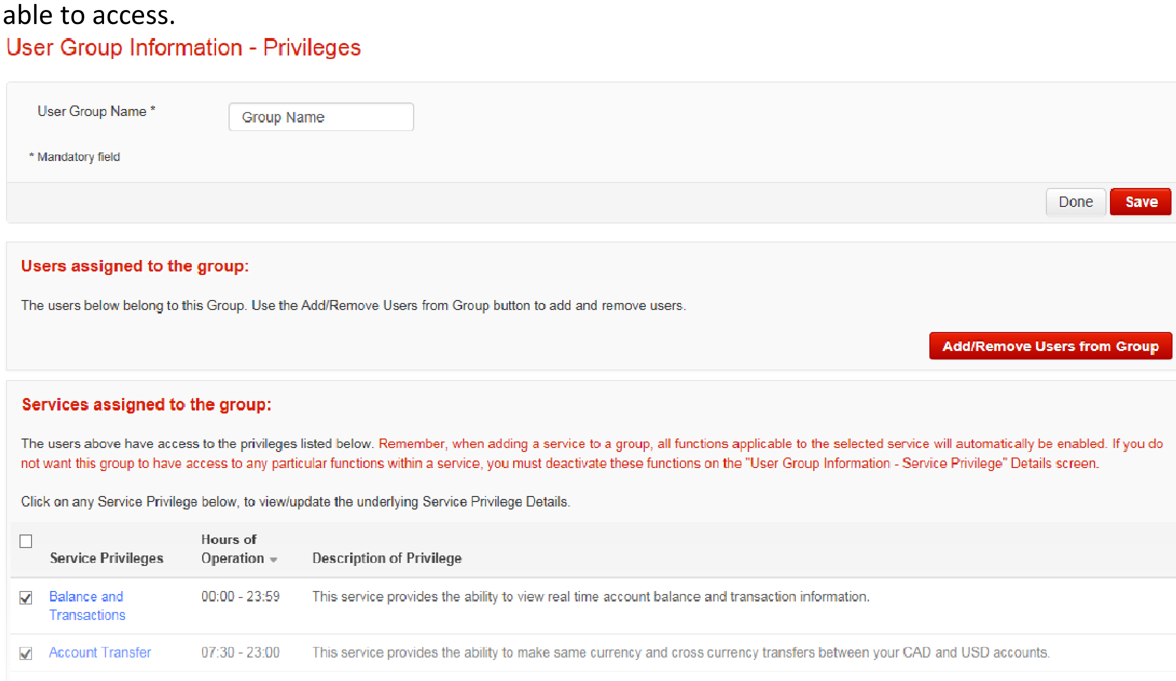


Creating & Modifying User Groups

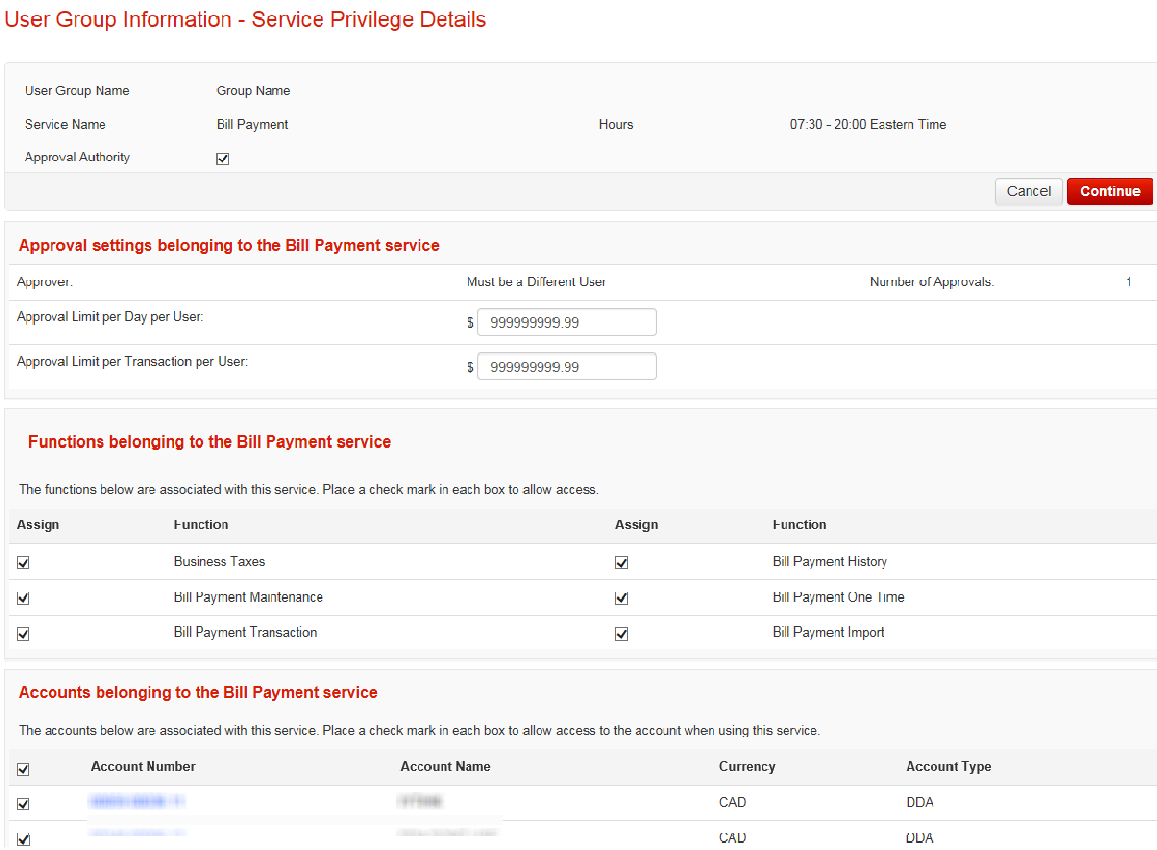
To create a new user group or modify an existing one click on the ‘Administration’ tab then click ‘User Groups’ from there a list of your existing groups will show.



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.



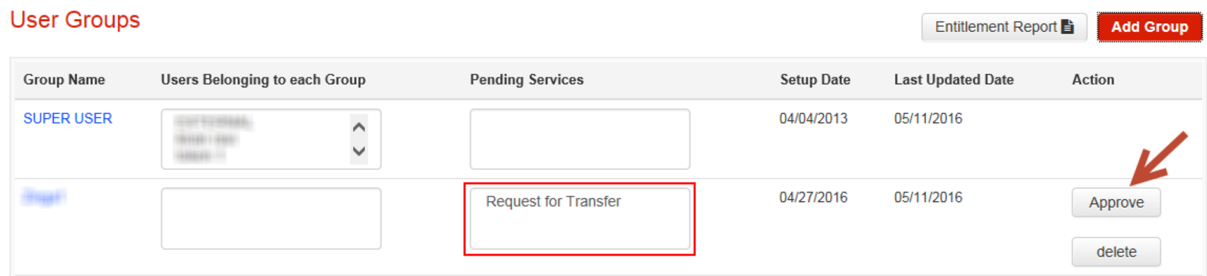
For each service selected, you can further administer group access by clicking on the name of the service privilege which will open the User Group – Service Privilege Detail window (see below). From this new window you can indicate which accounts the group can access for that function, if they have approval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



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

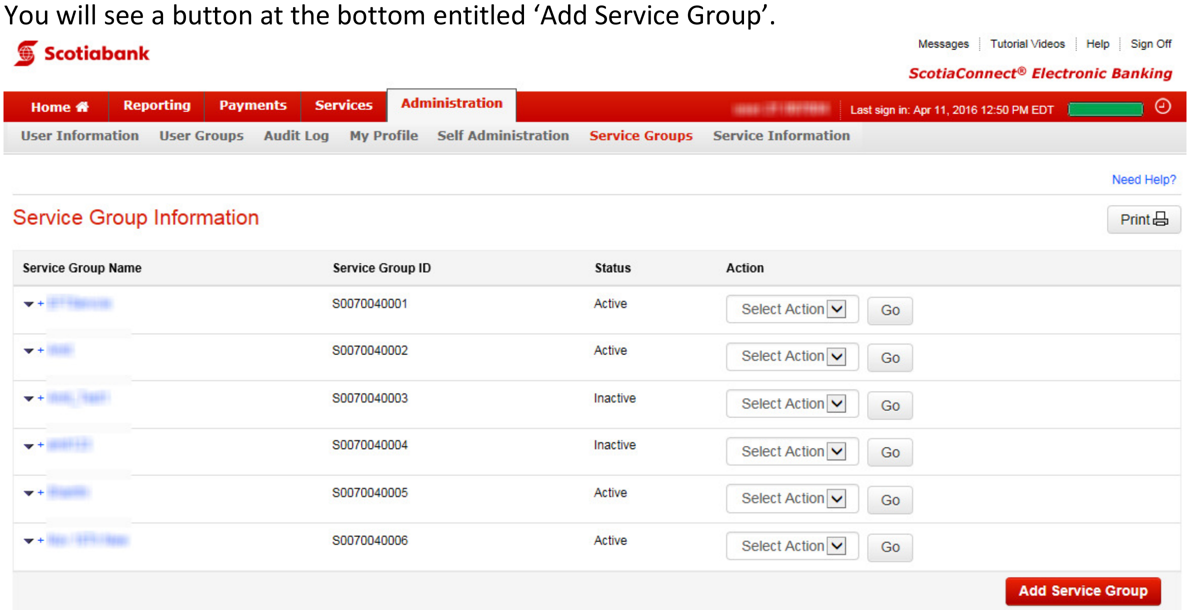
If you have services that require approval you can approve access to them based on how the service is setup. All services that require approval can be assigned by one user but must be approved by a second. Whether that user is in the same group as the approver or not is a function that can be indicated 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.



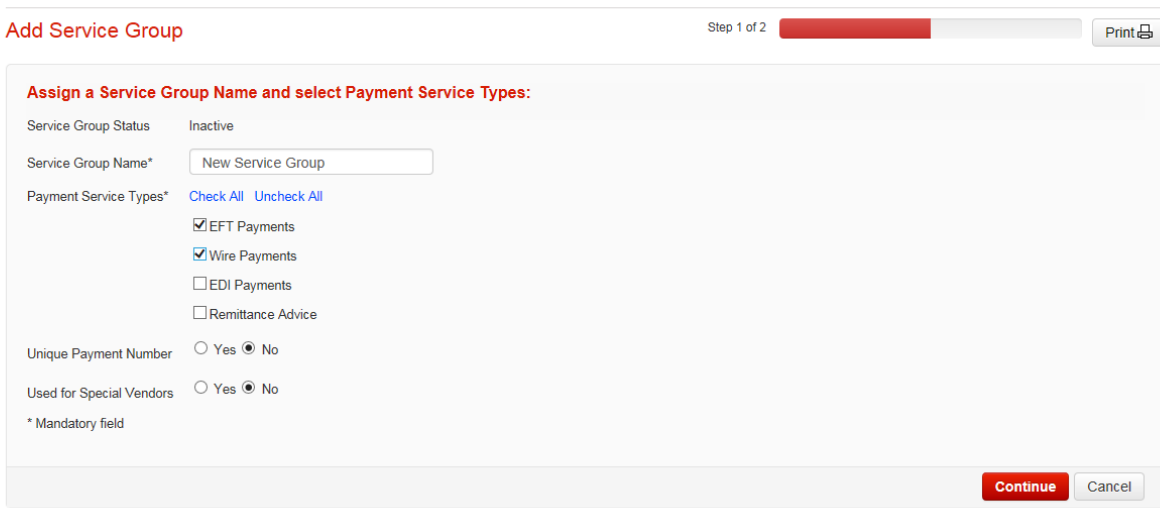
In order to approve a pending service you must go to ‘Administration’ then ‘User Groups’ then click the ‘Approve’ link next to the group with pending services. You will get a confirmation and the service will disappear from the box under the ‘Pending Services’ column.

Creating/Modifying a Service Group

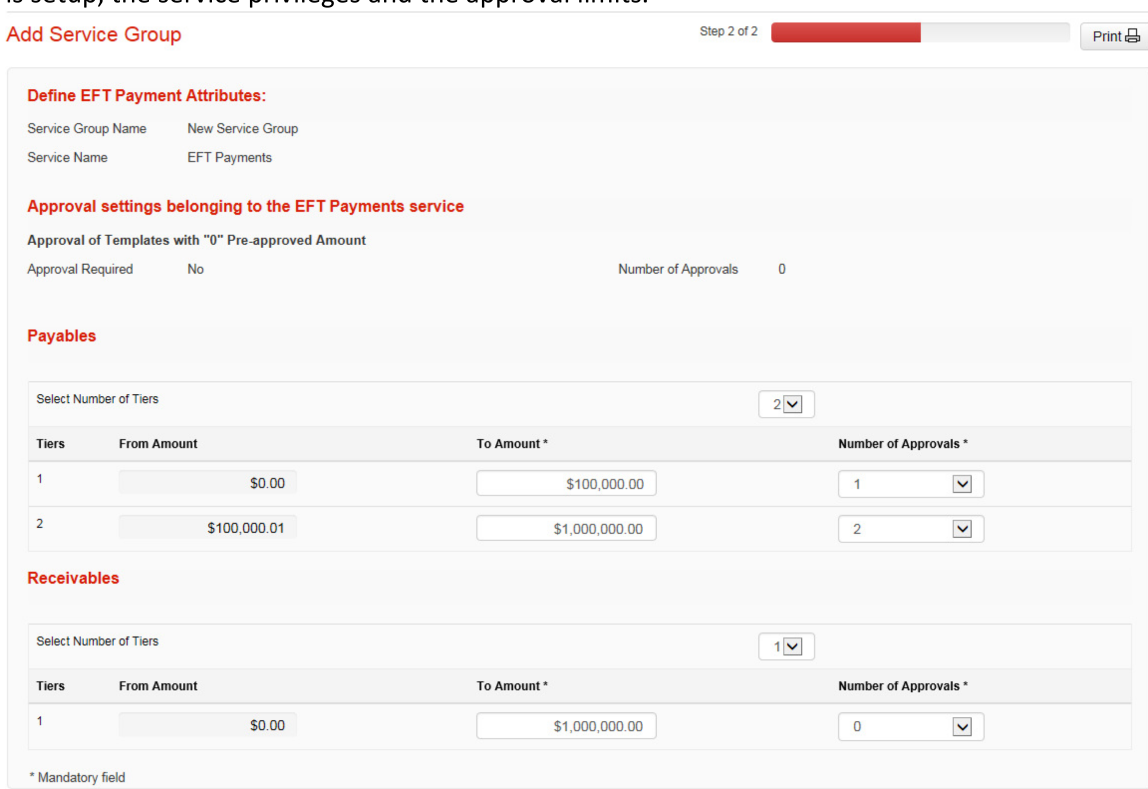
In order to create a new Service Group go under the ‘Administration’ tab then click ‘Service Groups’ You will see a button at the bottom entitled ‘Add Service Group’.

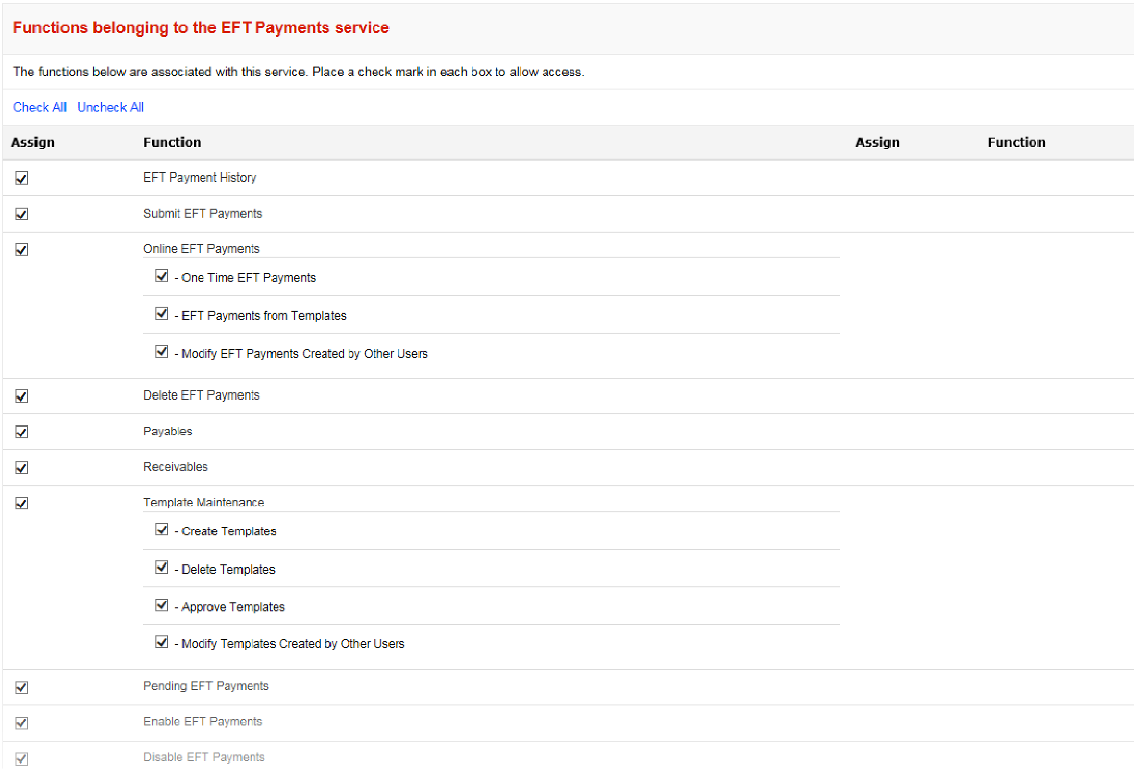


Step 1: Once you’ve clicked the button it will allow you to begin creating a service group. Name the group, indicate the Payment Service Types you want assigned and then click ‘Continue’



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.



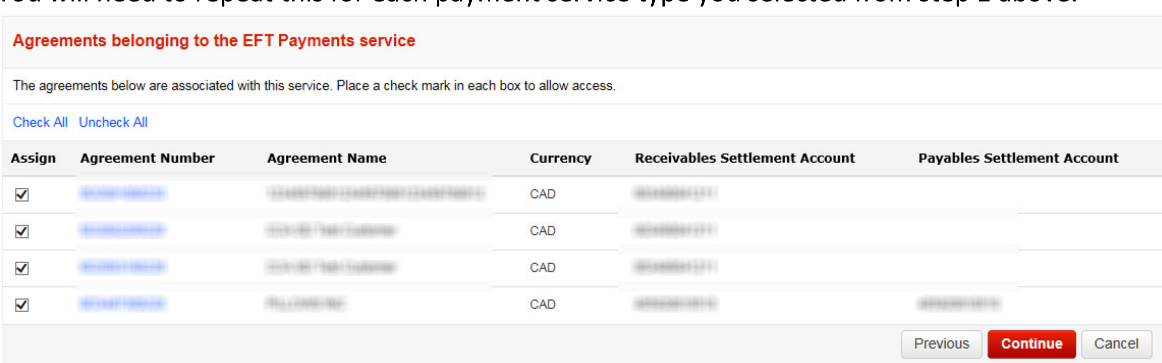

Functions belonging to the EFT Payments service

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
☑	EFT Payment History		
☑	Submit EFT Payments		
☑	Online EFT Payments ☑ - One Time EFT Payments ☑ - EFT Payments from Templates ☑ - Modify EFT Payments Created by Other Users		
☑	Delete EFT Payments		
☑	Payables		
☑	Receivables		
☑	Template Maintenance ☑ - Create Templates ☑ - Delete Templates ☑ - Approve Templates ☑ - Modify Templates Created by Other Users		
☑	Pending EFT Payments		
☑	Enable EFT Payments		
☑	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

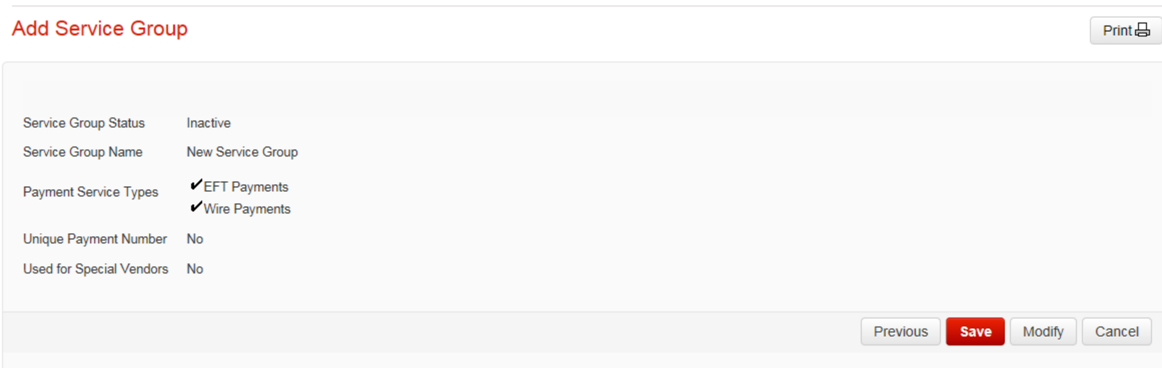
The agreements below are associated with this service. Place a check mark in each box to allow access.

Check All Uncheck All

Assign	Agreement Number	Agreement Name	Currency	Receivables Settlement Account	Payables Settlement Account
☑	[illegible]	[illegible]	CAD	[illegible]	
☑	[illegible]	[illegible]	CAD	[illegible]	
☑	[illegible]	[illegible]	CAD	[illegible]	
☑	[illegible]	[illegible]	CAD	[illegible]	[illegible]

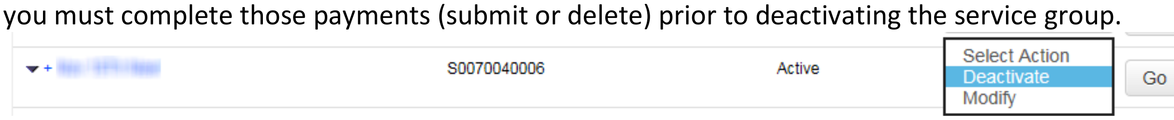
Previous Continue Cancel

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



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.

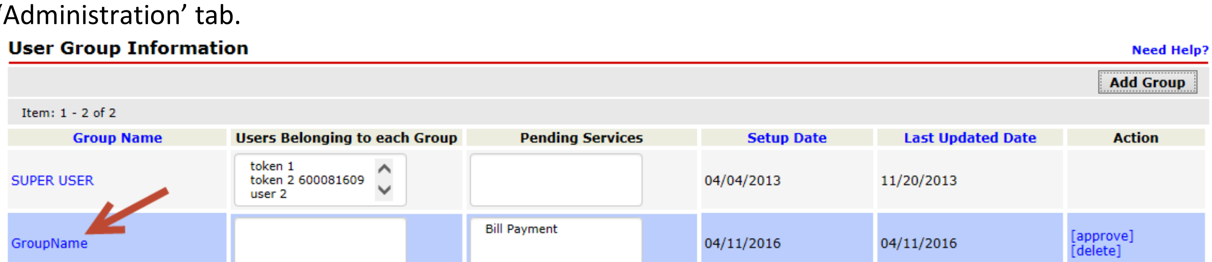
In order to modify a service group you've already created from the Service Group screen you will need to **deactivate the Service Group first**. If you have pending payments within that service group, you must complete those payments (submit or delete) prior to deactivating the service group.



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?

Add Group

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	
GroupName		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.

☐	Service Group Name	Service Group ID
☑	+ [illegible]	S0070040001
☑	- [illegible]	S0070040002

Assign	Scotiabank Service	Hours of Operation	Description Privilege
☑	EFT Payments	02:00 - 23:59	This service allows users to do EFT Payments.
☐	Wire Payments	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.
☐	EDI Payments	02:00 - 23:59	This service allows user to do EDI Payments
☐	Remittance Advice	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.

Scotiabank

Messages | Tutorial Videos | Help | Sign Off

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**. Your email will be answered within 24-48 business hours.
- To book product training, please send an email to **gtbgics.training@scotiabank.com**