

# ScotiaConnect® Electronic Banking

## Self- Serve Options Quick Reference Guide

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## Introduction

ScotiaConnect offers a variety of self-serve options for managing many common requests to save you time. These options are all available to all Super Users from within the ScotiaConnect application.

The options available are:

- Creating new users/super users.
- Resetting other user passwords
- Resetting the 30 day new user registration expiry
- Assigning users to groups to setup their entitlements
- Changing your own password
- Changing your secret questions and answers when logging in
- Changing/updating your company's address
- Managing your technical contacts for ScotiaConnect
- Managing your ScotiaConnect accounts
- Changing your ScotiaConnect billing account
- Viewing/downloading cheque images

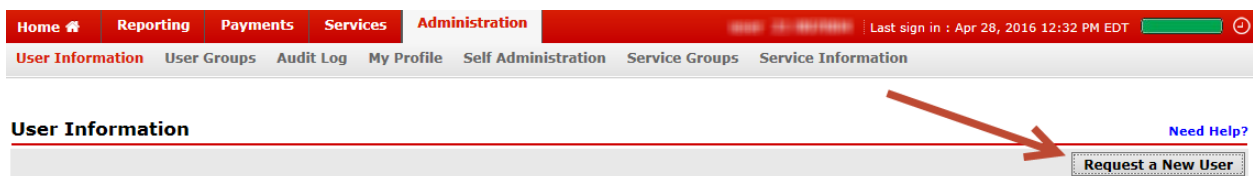
## ScotiaConnect User Management

Super Users and users with “administration” entitlements can manage other users in ScotiaConnect. This includes requesting new users, resetting passwords and resetting the 30 day new user registration window.

### Requesting New Users/Super Users

If you are a Super User or a user with administration access, you can request to have new users added within ScotiaConnect.

To do this, simply open the ‘Administration’ tab and then the ‘User Information’ tab from the submenu. Next select the ‘Request a New User’ button and you will be directed to a page where you can enter the new user’s information. Note that the secret word is mandatory and will be used for authenticating the new user if they contact Scotiabank for support.



New users will receive an email within 5 business days of submitting the request. A token will also be shipped to your company’s main contact on file.

Note: If you wish to make the user a **Super User**, you will need to return to the user information section after they have received their registration email. Locate the user from the list and select their name to open their details. The user will be in the “unassigned” group at this point.

User Detail

Print

User Name	<input type="text"/>	User Status	Active <input type="button" value="v"/>
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="button" value="v"/>
E-Mail	<input type="text"/>	Department	<input type="text"/>
Phone :*	<input type="text"/>	Extension :	<input type="text"/>
Country Preference :*	Canada <input type="button" value="v"/>	Report Preference :	EXCEL <input type="button" value="v"/>
Remarks	<input type="text"/>	Group	SUPER USER <input type="button" value="v"/>
Language	English CA <input type="button" value="v"/>		

\* Mandatory fields

Cancel Save

Change the group to the “Super User” group and save the changes. If adding users to groups requires approval for your company, another Super User will need to log in and access user groups page to click the “Approve” button.

User Groups

Any users that need to be approved will be displayed here.

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	Approve

### Resetting Passwords/30 Day Registration Expiry

If a user has forgotten their password or have been locked out as a result of too many failed attempts, a Super User or a user with administration access can recover the user from within ScotiaConnect. This is also used when a user has failed to register for ScotiaConnect within the 30 day window.

To recover a user, open the ‘Administration’ tab and then the ‘User Information’ tab from the submenu. A list of all users will be displayed on the screen. To recover the user, click their name under the ‘First & Last Name’ column. This will open the user detail page. Select the ‘Recover Password’ button to proceed.

User Detail

Need Help?

Recover Password Save Print Cancel

You will then be directed to the confirmation page. On this page you will need to enter your own password and current token value to proceed. Once the information is entered, select ‘Sign &

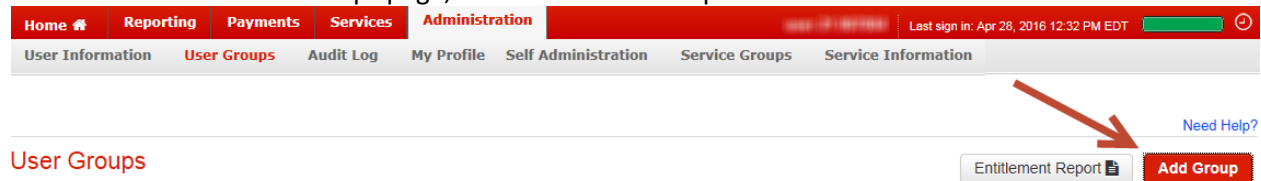
Submit'. The next page will display the authorization that the user will need to complete their password recovery. Note that code if no authorization code is generated, the user must use their secret word instead (this will not be displayed on this page). Please ensure to provide this information to the user. The user will also receive an email from Scotiabank with instructions on how to proceed.

## ScotiaConnect User Entitlements

A Super User or user with administration access is responsible for setting up the entitlements for all users in ScotiaConnect. When any new user is created, that user is 'unassigned' by default. This essentially means they don't have any access to any functions within ScotiaConnect. To add entitlements to a user, you must add them to a User Group. You will need to add them to an existing user group or create a new group first then add them. Note that entitlements for ScotiaConnect are based on the group settings. Every user added to the same group will share the same entitlements. Entitlements include privileges such as approval authority, account access and permission to submit a payment to name a few.

### Adding Users to a New Group

To create a new group, open the 'Administration' tab and then the 'User Groups' tab from the submenu. On the User Groups page, select the 'Add Group' icon.



This will open the group information privileges page. On this page, select all the services you wish to add to the group. It is also important to open each service to customize the specific settings and entitlements by clicking the service privilege name.

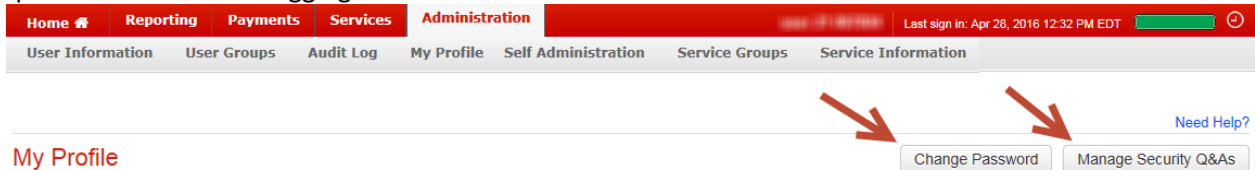
Once you have finished setting up all the services you can add/remove users. When the users have been added, click save then done to finish.

### Adding Users to an Existing Group

To add a user to an existing group, locate the group by opening the 'Administration' tab and then the 'User Groups' tab from the submenu (see above). All of your existing groups will be displayed. To add a user to the group, select the group by clicking the group name then select the 'Add/Remove Users' button to add the new user to the group. When the user has been added, click save then done to finish.

## Changing Your Password/Security Questions

Any user can change their password. It is strongly recommended to change your password on a regular schedule. To change your password, you must first open the 'Administration' tab and then open your user profile page by selecting 'My Profile' from the sub menu. Next select 'Change Password' to change your ScotiaConnect password or 'Manage Security Q&As' to change the security questions used when logging into ScotiaConnect.

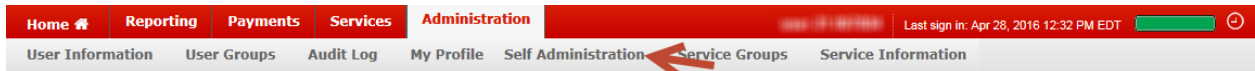


## Self Administration

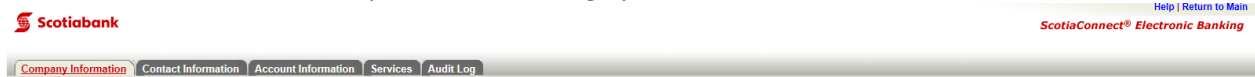
Self Administration is used to:

- Change/Update your company's address
- Manage your technical contacts for ScotiaConnect
- Manage your ScotiaConnect accounts
- Change your ScotiaConnect billing account

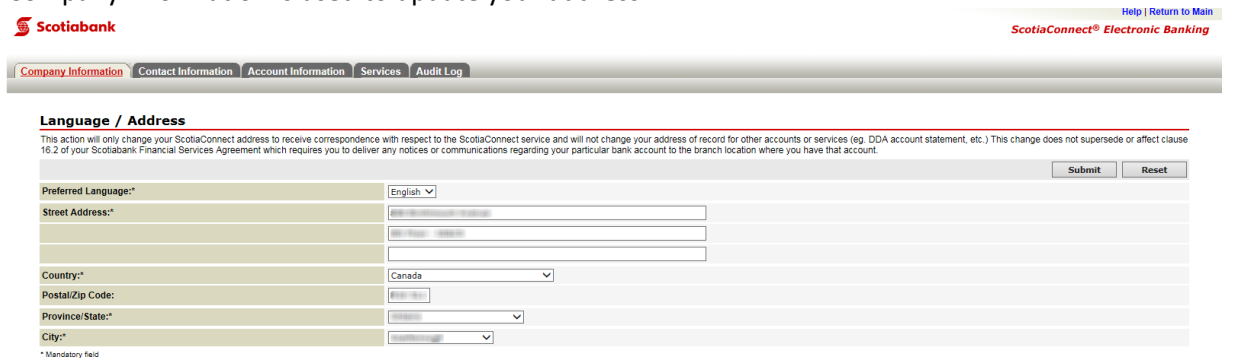
To make any of these changes, select the 'Self Administration' submenu from the 'Administration' menu.



Next select the tab that corresponds to the change you wish to make.



Company Information is used to update your address:



Contact Information is used to add/edit/remove technical contacts. Note these contacts are not the same as Scotiabank users. A technical contact is an authorized contact for support and other Scotiabank assistance. A technical contact may or may not also be a Scotiabank user.


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[Company Information](#) | [Contact Information](#) | [Account Information](#) | [Services](#) | [Audit Log](#)

**Contact Information**

Item: 1 - 2 of 2

Contact	Title	Contact Name	Status	Phone Number	Action
Technical	IT Contact	Shane, Shane	Active	(514) 754-7888	
Technical	Manager	Shane, Shane	Active	(514) 754-7888	

Account Information is used to add/edit/remove Scotiabank accounts. Note that only DDA type accounts can be added. To add any other type of account, please contact your Scotiabank Representative.


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**Change Account Information**

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Account Number	Acct Type	Short Name	Status	Daily debit limit	Daily credit limit	Debit limit per transfer	Credit limit per transfer	Acct Status	Curr	Action
00000000000000	C/A	TEST 1	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000001	C/A	TEST	Active	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	Open	CAD	
00000000000002	C/A	000 (Bank Account)	Active	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	Open	CAD	
00000000000003	C/A	000 (Bank Acct - 00000000)	Active	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	Open	USD	
00000000000004	C/A	000000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000005	C/A	000 (Bank)	Active	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	Open	CAD	
00000000000006	C/A	000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	USD	
00000000000007	C/A	000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000008	C/A	000 (Bank Account)	Active	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	Open	CAD	
00000000000009	C/A	TEST	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000010	C/A	000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000011	C/A	000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000012	C/A	000000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000013	C/A	000000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000014	C/A	000000 (Bank)	Active	\$0.00	\$0.00	\$0.00	\$0.00	Removed	CAD	Deleted
00000000000015	C/A	000000	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	
00000000000016	C/A	TEST	Active	\$0.00	\$0.00	\$0.00	\$0.00	Open	CAD	

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Services is used to change your Scotiabank billing account. Note you can only select accounts that have already been added to Scotiabank.


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**Self-Administration Billing Account Details**

What Scotiabank account should we debit for service fees?

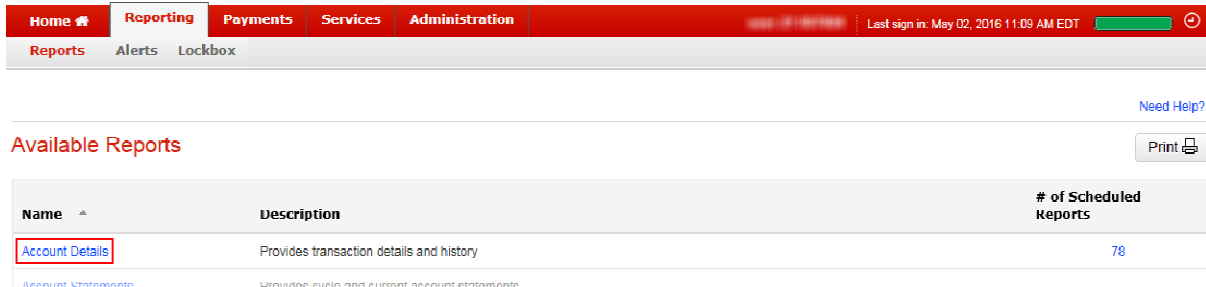
Billing Currency:

Billing address same as customer address

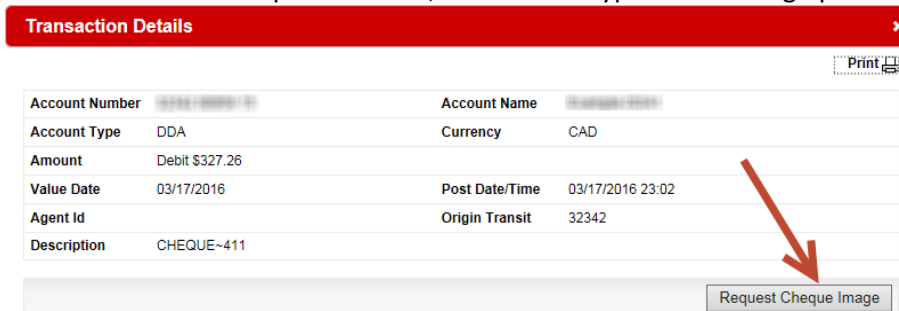
Any changes made in Self-Administration must be submitted.

## Viewing/Downloading Copies of Cheques

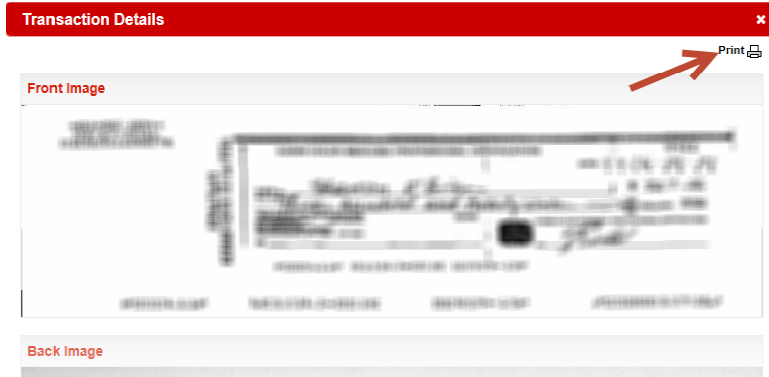
You can view and download copies of your cheques via the 'Account Details' report in ScotiaConnect. To access this report, select the 'Reporting' tab from the ScotiaConnect menu, then select 'Account Details' from the list:



From the account details screen, enter your search criteria and then select 'View' to display your results. Once the cheque is located, click on the hyperlink to bring up its details.

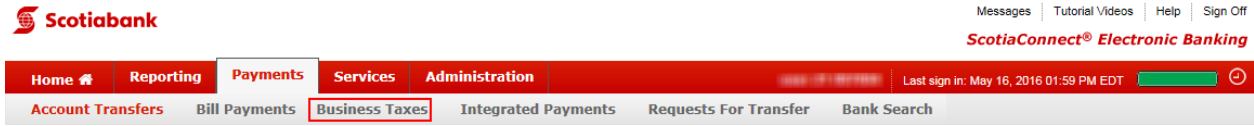


Select the 'Request Cheque Image' to display the image of the cheque. You can also print the image of the cheque by clicking the print icon near the top right corner.



## Enrolling in Business Taxes

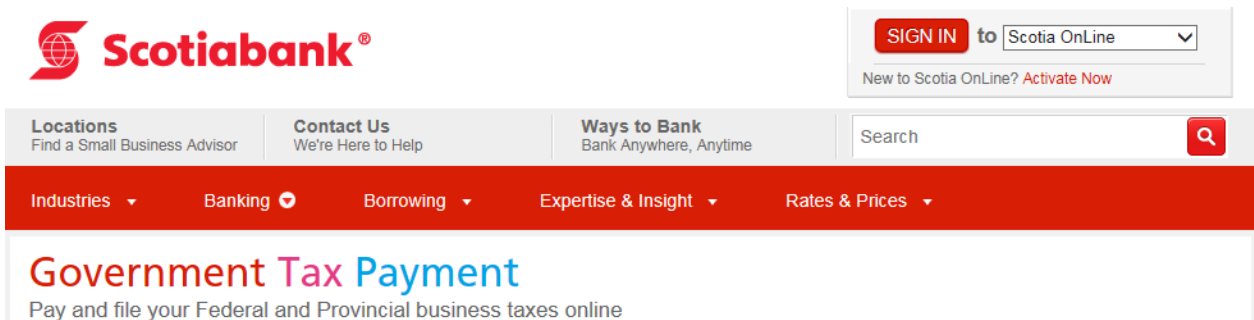
To enroll in the Government Tax Payment & Filing service from within Scotiabank, select 'Business Taxes' from the main 'Payments' tab.



This will open a new page for logging into the service. In the top right corner of the login screen, select the 'About This Service' link to be redirected to the overview page.



You will be redirected to the Government Tax Payment page.



Near the bottom of the page you will find the section for Scotiabank users. Please select the 'Enroll' link to download an enrollment form. The form will have all the information needed to complete the enrollment.

### For Scotiabank® electronic banking users:

- Minimum monthly fee of \$2.00 if no tax payments are filed in a one-month period
- Minimum monthly fee is waived when at least one tax payment is made
- **Enroll** now for a one-time fee of \$25 or **login** if you've already registered for the service.



## 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.

### ScotiaConnect Tutorial Videos

- Video tutorials are available in the ScotiaConnect help menu available in the top right corner of every page in ScotiaConnect (see screenshot below).



[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](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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