

Identifying Roles and Entitlements

Quick Reference Guide

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ROLES AND RESPONSIBILITIES WITHIN SCOTIACONNECT

In ScotiaConnect, there can be two types of users:

- Super Users
- Regular Users

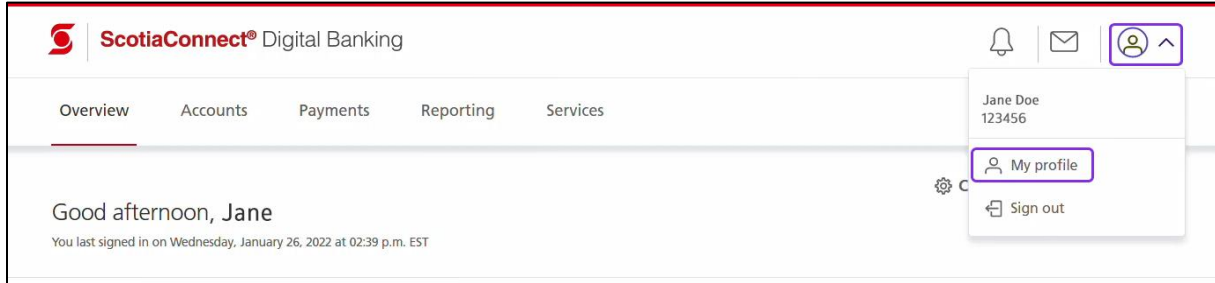
The **Role Summary Table** provides details on the tasks that Super Users and Regular Users can perform.

ROLE SUMMARY TABLE

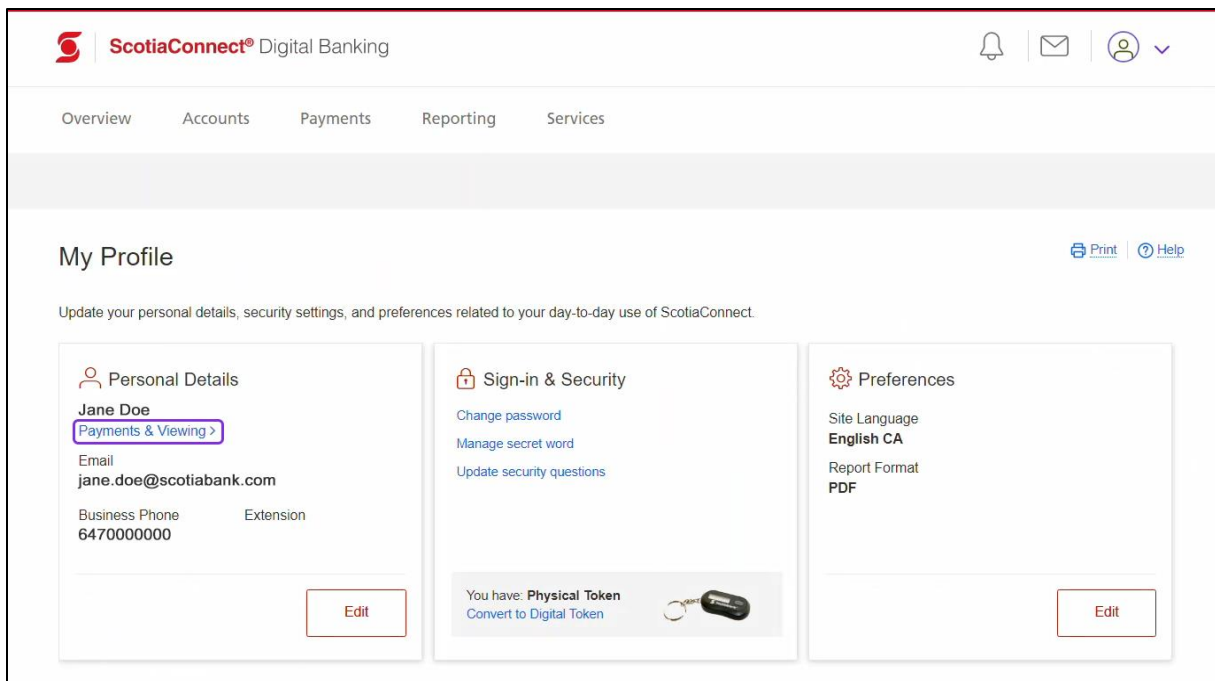
	Super Users	Regular Users
Role Overview	<ul style="list-style-type: none"> • The first ScotiaConnect user created for an organization is a super user. • There can be multiple super users for an organization. • The activities performed by a super user cannot be restricted. However, a super user can be converted to a regular user to limit their access. • Important: A super user needs to create additional ScotiaConnect users (these can be additional super users or regular users) and finalize/update the set-up options (administrative tasks) within ScotiaConnect. Alternatively, the super user can create additional super users or regular users with administration entitlement who can create the required users and finalize/update the set-up options. 	<ul style="list-style-type: none"> • A regular user can perform only those tasks that they have been provided access to (known as entitlements). For example, access to create payments, submit payments, view reports, etc. • A super user or a regular user with administration entitlement needs to create a regular user and set up or update the user's entitlements.
Ability to perform regular-user (entitled) tasks such as creating payments, submitting payments, viewing reports	Yes Note: A super user will need to adhere to the approval levels set for creating, approving and submitting payments.	Yes – as assigned
Ability to perform administrative tasks such as creating or deleting users, resetting passwords, providing access/entitlements	Yes	No – unless provided administration entitlement
Ability to manage company and account details	Yes	No

CHECKING YOUR ENTITLEMENTS

To check the details of your role, click the User icon at the top-right section of the screen and then select **My profile**.



This displays your profile information. In the **Personal Details** section, under your name, you can view the entitlements that you have. If the entitlements displayed are not what they need to be, please contact your Organization's ScotiaConnect Super User or Administrator to update your entitlements.



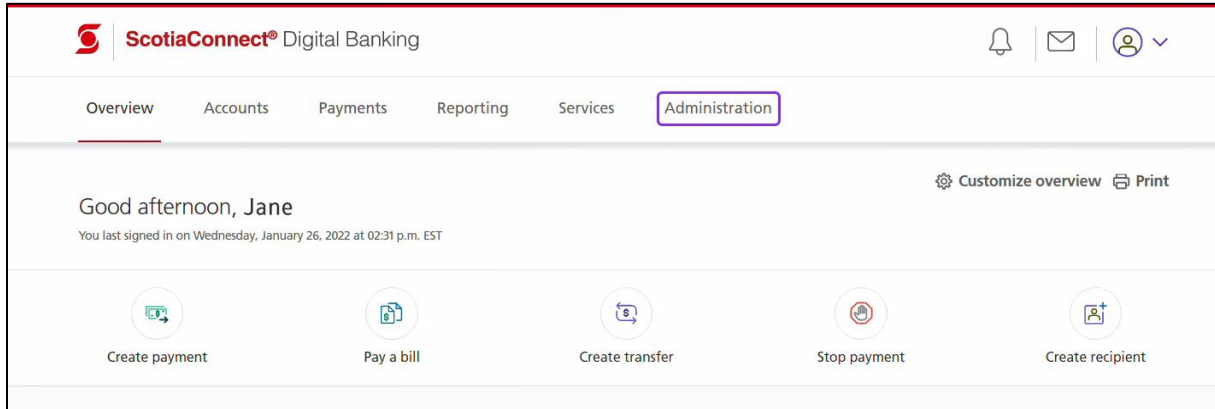
Note: If you are a Super User, the **Personal Details** section will state that you are a Super User.

The screenshot displays the ScotiaConnect Digital Banking interface. At the top, the logo and name 'ScotiaConnect® Digital Banking' are visible on the left, and notification, email, and user profile icons are on the right. A navigation menu below the header includes 'Overview', 'Accounts', 'Payments', 'Reporting', 'Services', and 'Administration'. The main content area is titled 'My Profile' and includes 'Print' and 'Help' links. A sub-header reads: 'Update your personal details, security settings, and preferences related to your day-to-day use of ScotiaConnect.' Below this are three panels:

- Personal Details:** Shows the user's name 'Jane Doe' with a 'Super User >' label, email 'jane.doe@scotiabank.com', and business phone '647000000'. An 'Edit' button is at the bottom right.
- Sign-in & Security:** Offers options to 'Change password', 'Manage secret word', and 'Update security questions'. It also indicates the user has a 'Physical Token' and provides a 'Convert to Digital Token' link. An 'Edit' button is at the bottom right.
- Preferences:** Shows 'Site Language' set to 'English CA' and 'Report Format' set to 'PDF'. An 'Edit' button is at the bottom right.

SUPER USERS AND ADMINISTRATORS: CHECKING ENTITLEMENTS OF USERS

A Super User or Administrator can create new users and update entitlements for existing users. If you are a Super User or Administrator, you can check the entitlements for all ScotiaConnect users. To view entitlements of users, click the **Administration** tab and then access the user’s profile.



To view detailed steps on how to access a user’s profile and update entitlements, visit the ScotiaConnect Help Centre by clicking the **Help Centre** link at the bottom of any ScotiaConnect page.



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