

Adding Users and Setting User Permissions

Quick Reference Guide

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Note only Super Users and users with administration privileges can complete the steps outlined in this guide.

ADDING NEW USERS

To add new users to ScotiaConnect, click Administration, then Users and company permissions. Below your list of users, you will see the button to add a new user.

User & Company Permissions

Users & Permissions

NAME	USER ID	PERMISSION	LAST SIGN IN	STATUS	ACTIONS
011110BPT1 011110BPT1	011110BPT1	Super User	Feb 28, 2019 07:50 AM	Active with Physical Token	Edit Recover credentials Delete
011110BPT2 011110BPT2	011110BPT2	Super User	May 13, 2019 07:09 AM	Active with Physical Token	Edit Recover credentials Delete
011110User999 Simplified	011110User999	Payments access	Feb 11, 2019 04:45 AM	Active with Physical Token	Edit Recover credentials Delete



To add a user, please enter all the required information. The secret word is to be shared with the new user only. It will be used to confirm their identity when calling us for support.

Add user | Enter details

1 **Enter Details** 2 Set permissions 3 Order security token

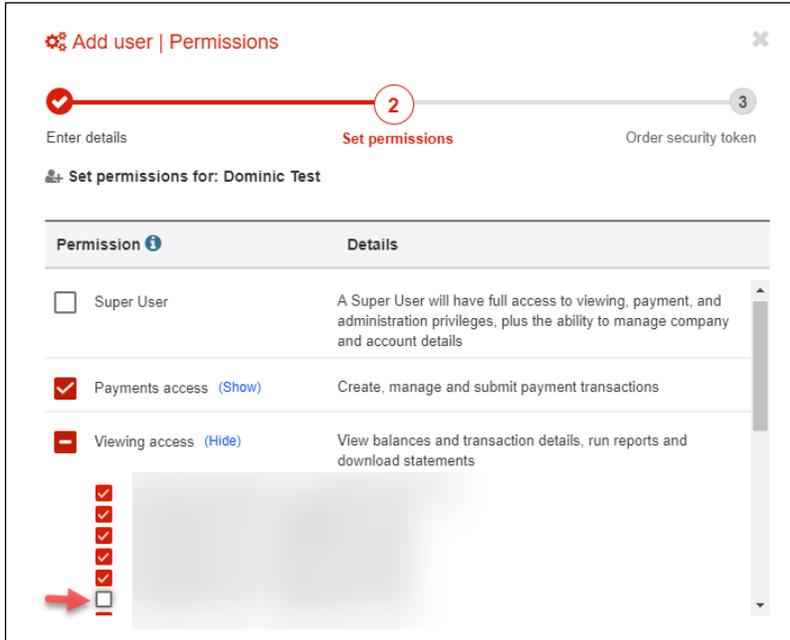
User details

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.

Continue

ASSIGNING PERMISSIONS TO NEW USERS

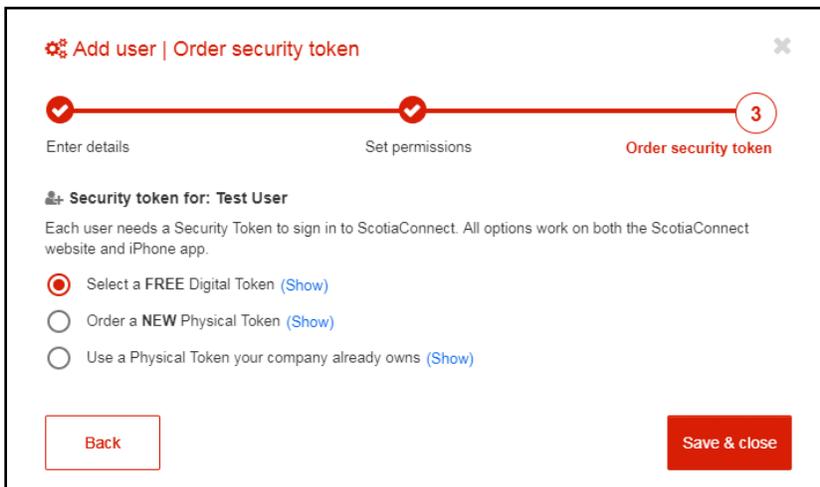
After clicking 'Continue' you will need to assign permissions for the user. Permissions with a 'Show' text link next to their name can be expanded to customize account access.



CUSTOM PERMISSIONS

If you choose to make changes to the Viewing and Payment Access preset permissions, you will be creating a custom permission. For example, if you remove an account from Viewing Access, you will be prompted to enter a custom name for this access. You can then assign this same custom permission to any other users going forward.

The next screen you will Select the Security Token option that best meets your needs then click 'Save & close' to finalize the request.



If you select 'Order a New Physical Token' the company address will be displayed. Confirm it is correct before clicking 'Save & Close' or click the drop menu to provide a different address.

Once you click 'Save & close' you will be redirected to the Administration screen. An email will be sent to the user with information on how to register for ScotiaConnect.

EDITING EXISTING USERS

To edit an existing user, locate the user from the 'User & Company Permissions' screen and click the 'Edit' icon to make changes to their details and/or permissions.

Users & Permissions						
NAME	USER ID	PERMISSION	LAST SIGN IN	STATUS	ACTIONS	
011110BPT1 011110BPT1	011110BPT1	Super User	Feb 28, 2019 07:50 AM	Active with Physical Token	Edit ← Recover credentials Delete	

FOR FURTHER ASSISTANCE

Need Help?

In the footer of any page in ScotiaConnect, you will find a 'Help Center' 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.

Global Business Payments Technical 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
- Email: hd.ccebs@scotiabank.com. Your email will be answered within 24-48 business hours.

If you have any questions about the content of this guide email us at:

gbp.training@scotiabank.com

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