

# ScotiaConnect User Administration

## Quick Reference Guide

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## CREATING USERS

To create a new user for ScotiaConnect, go to 'Administration', then 'User Information', and select 'Request New User'.

Fill in the mandatory fields (marked with an \*) and click 'Continue'. You can select the group the user will belong to using the 'Group' dropdown menu. You must assign every user to a group for them to be able to sign in to ScotiaConnect.

**Request a User** Print 

There are two steps to add a user: enter their name and contact information on this page, and select a Security Token option on the next page.  
We aim to save your new user to our system in real time.

**New User Details**

Last Name :*	<input type="text"/>	Middle Name :	<input type="text"/>
First Name :*	<input type="text"/>	Department :	<input type="text"/>
Job Title :	<input type="text"/>	Extension :	<input type="text"/>
Phone :*	<input type="text"/>	Report Preference :	<input type="text" value="PDF"/>
E-Mail :*	<input type="text"/>	Temporary secret word :*	<input type="text" value=""/>
Country Preference :	<input type="text" value="Canada"/>	Group :	<input type="text" value="Unassigned"/>
Language :	<input type="text" value="English CA"/>		

\* Mandatory field

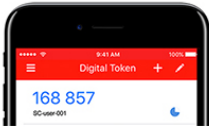
**Note:** 'Temporary secret Word' is an extremely important field. This is the only time you will see this information and you will need to provide it to your user.

Select the Security Token option that best meets your needs then click 'Submit'.

**Digital Token**

Select a **FREE** Digital Token

- No cost, and your new user can register for ScotiaConnect right away
- The secure iPhone and Android apps display a 6-digit value every 30 seconds.




**OR**

**Physical Token**

Order a **NEW** Physical Token

- A new physical token is **\$50 + \$2.5 monthly maintenance fee** (including tax and shipping), charged to your default account
- Your new user can register for ScotiaConnect once they receive it
- Simple press of its button displays a new 6-digit value usable for 30 seconds



**OR**

Use a Physical Token your company already owns

- No cost to use or re-use an existing Physical Token
- Remember, each ScotiaConnect user needs their own token

If you select 'Order a New Physical Token' you must then indicate the delivery destination. 'Business Address on file' will show the company address we have on file. Confirm it is correct before clicking 'Submit'. 'A different address' will allow you to enter an address free form.

**Note:** PO. Boxes are not valid delivery addresses for physical tokens.

If you select 'Use a Physical token your company already owns' you can also check the availability of that token by clicking the link shown below:

Enter the serial number and click the 'Check' button, Serial numbers are 12 digits beginning with 'GALT' in uppercase.

You will then be told if the token is assigned to a profile or not. If it is already assigned to another user's profile, you will have the option to delete that user. Deleting the user will remove their ability to sign in to ScotiaConnect.

Once you submit the user request you will receive a confirmation message and the user will show in either 'Pending' or 'Active' status. If the user is 'Pending' a second user with approval authority must approve them. Active users can begin their registration once they receive their physical token or have installed the digital token.

**User Information** [Request a New User](#)

**Success confirmation:**  
 You successfully added Test User, who will receive registration instructions by email. A new Physical Token will be delivered to your business address on file.

First & Last Name	User ID	Department	Group Name	User Status	Status Updated	Pending Service	Action
<a href="#">[Name]</a>	[ID]		SUPER USER	Active			
<a href="#">Test Test</a>			UNASSIGNED ROLE	Active			
<a href="#">Test User</a>			UNASSIGNED ROLE	Active			

## MODIFYING USERS

To modify an existing user, go to Administration then User information and click on the name of the user you wish to update.

**User Information** [Request a New User](#)

First & Last Name	User ID	Department	Group Name	User Status	Last Sign In	Pending Service	Action
<a href="#">[Name]</a>	[ID]		SUPER USER	Active	Nov 06, 2017 03:20 PM		<a href="#">Delete</a>
<a href="#">User Test</a>			SUPER USER	Incomplete			<a href="#">Delete</a>

Make the changes you wish to make then click 'Save'. 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 ID		User Status	Active
Last Name	Test	Global User ID	
First Name	User	Authorization Code	Scotia
Middle Name		Job Title	
E-Mail	test@test.ca	Department	
Phone	4444444444	Extension	
Country Preference	Canada	Report Preference :	PDF(FOR IE7.0 +)
Remarks		Security Token Type	Digital Token
Language	English CA	Group	SUPER USER

[Cancel](#)
[Recover Credentials](#)
[Save](#)

## RECOVERING USERS

To recover a user’s password, go to ‘Administration’ then ‘User Information’ and click on the name of the user you want to recover.

User Information							Request a New User
First & Last Name ^	User ID	Department	Group Name	User Status	Last Sign In	Pending Service	Action
[Redacted]	[Redacted]		SUPER USER	Active	Nov 06, 2017 03:20 PM		Delete
User Test			SUPER USER	Incomplete			Delete

Click ‘Recover Credentials’ at the bottom of the User Details page.

Country Preference	Canada	Report Preference :	PDF(FOR IE7.0 +)
Remarks		Security Token Type	Digital Token
Language	English CA	Group	SUPER USER
Cancel		Recover Credentials	Save

Once you click that button you will be asked to indicate if you wish to recover the user’s password, security questions or both by placing checkmarks next to the appropriate options then click ‘Next’.

**Recover Credentials** ✕

Check either or both of the following to recover:

Password

Security questions and answers

Cancel **Next**

Verify the user’s email address and click ‘Sign & Submit’.

**Confirm User 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 fgsdfhg fdsag

User Email bgxcfh@tryt.com

Recovery Status New Recovery

Request Date 06/07/2017 14:51:08

Request By Training User

Requested By ID 008501TrainingUser

Please enter password \*  Please enter your Token Value \*

Cancel **Sign & Submit**

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 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="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"/>

Your user will receive a recovery email; they should then go to the ScotiaConnect homepage and click ‘Recover Credentials’. They will enter their reference number from the email, and authorization code or secret word and if successful, be prompted to choose a new password.

**Sign In to ScotiaConnect**

User ID	<input type="text"/>	<a href="#">Bookmark This Page</a>
Password	<input type="text"/>	<a href="#">Forgot Password</a>
Token Value	<input type="text"/>	<a href="#">Forgot Username</a>
<input checked="" type="checkbox"/> Remember User ID <input type="button" value="i"/>		<a href="#">Recover Credentials</a>
<input type="button" value="Sign In"/>		<a href="#">Problem Signing In ?</a>
		<a href="#">&gt;New to ScotiaConnect? Register now</a>

## RESTRICTING ACCESS TO SCOTIA MOBILE AND THE DIGITAL TOKEN

Users with Administration access can restrict access to the Scotia Mobile App by following the steps outlined below. Go to Administration, then User Information and select the user you wish to block from accessing Scotia Mobile.

**User Information** [Help](#)

<input type="checkbox"/>	First & Last Name ^	User ID	User Group	Security Token	Restrictions	Status	Last Sign In	Pending Services	Action
<input checked="" type="checkbox"/>	User 1	008185User1	SUPER USER	Physical Token		Active	Jun 14, 2019 09:03 AM		<input type="button" value="Delete"/>

On the user details page under Entitlements & Restrictions you can select whether the user can use the digital token and/or the Scotia Mobile application. Once you have made your selections click 'Save' to finalize the changes.



**Entitlements & Restrictions**

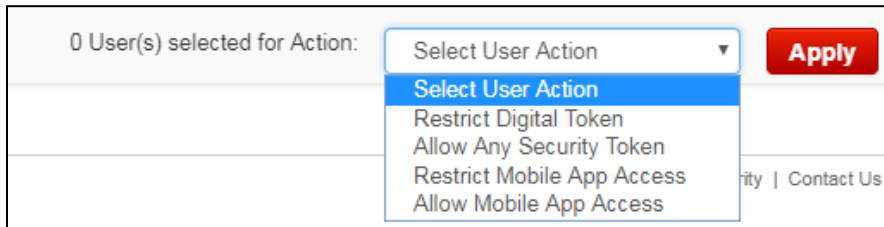
Group: testgroup1

Digital Token: Allowed

Mobile App: Allowed

Buttons: Cancel, Recover Credentials, Save

You can also make changes by selecting users with a checkbox and choosing an action from the dropdown at the bottom of the user Information page and clicking 'Apply'.



0 User(s) selected for Action:

Select User Action

- Select User Action
- Restrict Digital Token
- Allow Any Security Token
- Restrict Mobile App Access
- Allow Mobile App Access

Apply

## 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](mailto: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](mailto:gbp.training@scotiabank.com)

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