

SCOTTISH WIDOWS PLATFORM

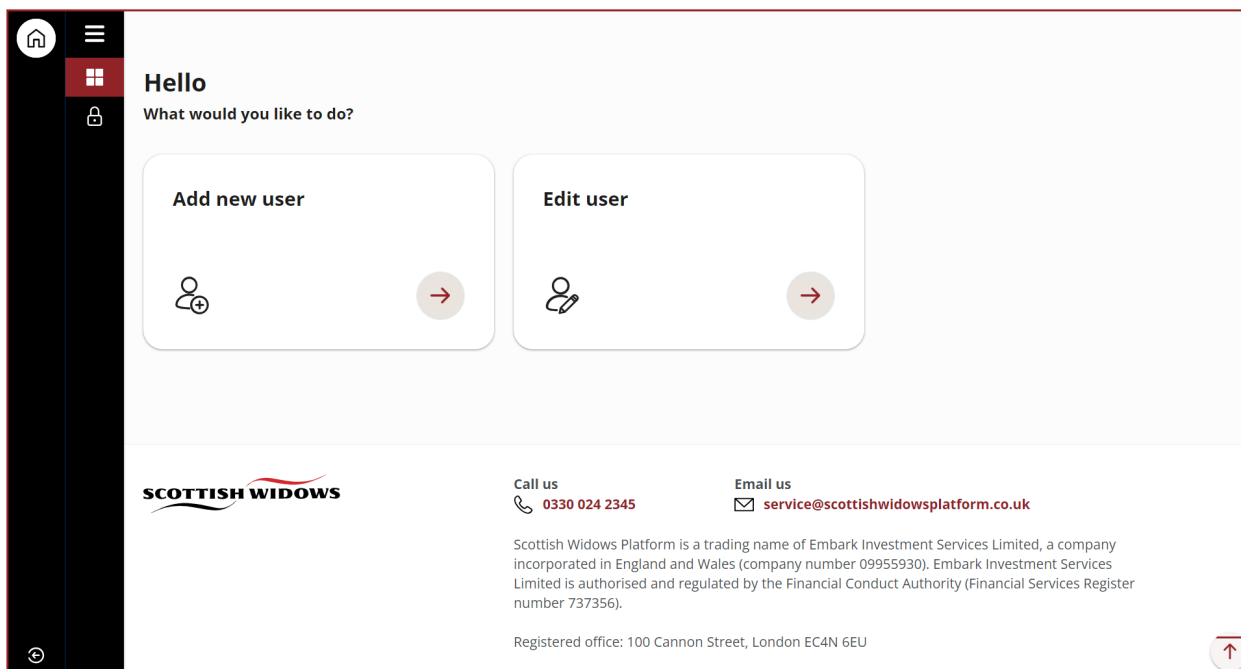
Security User Guide

For Professional Advisers only

SCOTTISH WIDOWS



Security user access - Home screen



When you login using your security user access, you will be given two options:

- **Add new user** allows you to add a new user. When you select this action tile, you will then be asked if you would like to add a new adviser type user or non-adviser type user.
- **Edit User** allows you to edit an existing user (this includes unlocking a users account) When you select this action tile, you will be asked for details to search for the user you wish to edit.

The first section of this guide will help you with adding a new user. Page 6 onwards provides more information on editing existing users.

Select the appropriate level of access for the user from the menu. Then click **Start**.

- **Adviser users** need to be set up for any financial advisers looking to place business on the platform.
- **Non-adviser users** should be set up for anyone who needs access to clients on the platform to administer them on the adviser's behalf.

Search for the specific user using any of the search fields. Leaving the search fields blank and pressing **Search** will return all available results for you to search through.

Security user access - New user

[Back](#)

User Details

1 User Details 2 User Account Access 3 Validate And Execute

Step 1 User Details Exit [Save](#) [Next step](#)

Access Information

Company:	2h Wealthcare LLP
Access Level: ▾	<input type="text" value="Read Only"/>
User Type:	Adviser
User Can Build Adviser Model Portfolios:	<input type="text" value="Yes"/>
User Can Authorise Model Portfolios:	<input type="text" value="No"/>

Create new users following the simple three step process.

In **step 1**, you will be asked for details of the new user.

Select from the dropdown fields to tailor the access level to suit the user.

Security user access - New user

Back

User Account Access

1 User Details
2 User Account Access
 3 Validate And Execute

Step 2 User Account Access
Exit
Save
Previous step
Next step

Please select the level of user access from following options:

Company

Adviser

Adviser Level Access:

Adviser Name	Read Only Access	Read / Write Access	Remove
test alert	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
A Adviser (EI013290000112)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
AAA Adviser (EI013290000045)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
ABC Adviser One XYZ one (EI013290000310)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Abirami Harish (EI013290000249)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
AdSN Adviser (EI013290000233)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

User Account Access allows to select whether the user has access to administer clients across the Company or be aligned to a specific adviser.

If providing access to the Company, you can replicate another user's access to ensure different job roles have the correct level of access to suit.

Security user access - New user

[Back](#)

🔔 All data entered has been successfully validated.

1 User Details 2 User Account Access 3 **Validate And Execute**

Step 3 Validate And Execute [Exit](#) [Save](#) [Previous step](#)

1. Validation Data

🔔 Check all required data has been entered.

Page	Field	Reason
All data entered has been successfully validated.		

2. Implement

To confirm that you wish to proceed to the final step, click here. [Submit](#)

[Previous step](#)

The platform will validate the user to confirm data entry has been successful.

Once validation has completed you can click **submit** to set the new user up. This will generate usernames and passwords unique to that user.

Security user access - Edit user

[Back](#)

User Details

1 User Details 2 User Account Access 3 Account Control 4 Validate and Execute

Step 1 User Details Exit [Save](#) [Next step](#)

Access Information

Company:	2h Wealthcare LLP
Access Level: ▼	Read Write ▼
Username:	aadviser406
User Type:	Adviser
User Can Build Adviser Model Portfolios:	Yes ▼
User Can Authorise Model Portfolios:	Yes ▼

The three step process allows you to amend user access, what the user is linked to and reset passwords.

In step one you can amend the level of access the user has either restricting or opening up permissions for the work they can do on the platform.

Security user access - Edit user

[Back](#)

Edit Users

Select user for editing:

User Name:

User Logon:

Email Address:

User Type:

[Search](#)

Search for the specific user using any of the search fields. Leaving the search fields blank and pressing search will return all available results for you to search through.

Security user access - Edit user

Account Control

1 User Details 2 Account Control 3 Validate and Execute

Step 2 Account Control Exit Save Previous step Next step

Current Access

Password Status:	Unlocked
Password Expiry Date:	27-Aug-2022
Memorable Phrase:	
Account Status:	Enabled
Last Logon Date:	User has never logged in

Edit Access

Lock Account:	<input type="checkbox"/>
Locked by password entered incorrectly or failing first time - login date of birth challenge:	<input checked="" type="checkbox"/>
Locked by memorable pin challenge:	<input checked="" type="checkbox"/>
Locked by password reset - date of birth challenge:	<input checked="" type="checkbox"/>
Locked by admin or locked by security question answers challenge:	<input checked="" type="checkbox"/>
Lock Password:	<input type="checkbox"/>
Reset Password:	<input type="checkbox"/>
Expire Password:	<input checked="" type="checkbox"/>
Lock Memorable Pin:	<input type="checkbox"/>
Clear memorable pin:	<input type="checkbox"/>

You can amend the Account or advise the user is linked to.

Restrict or expand the users access to either Read Only or Read/Write.

Security user access - Account control

[Back](#)

🔔 All data entered has been successfully validated.

1 User Details 2 Account Control 3 **Validate and Execute**

Step 3 Validate and Execute [Exit](#) [Save](#) [Previous step](#)

1. Validation Data

🔔 Check all required data has been entered.

Page	Field	Reason
All data entered has been successfully validated.		

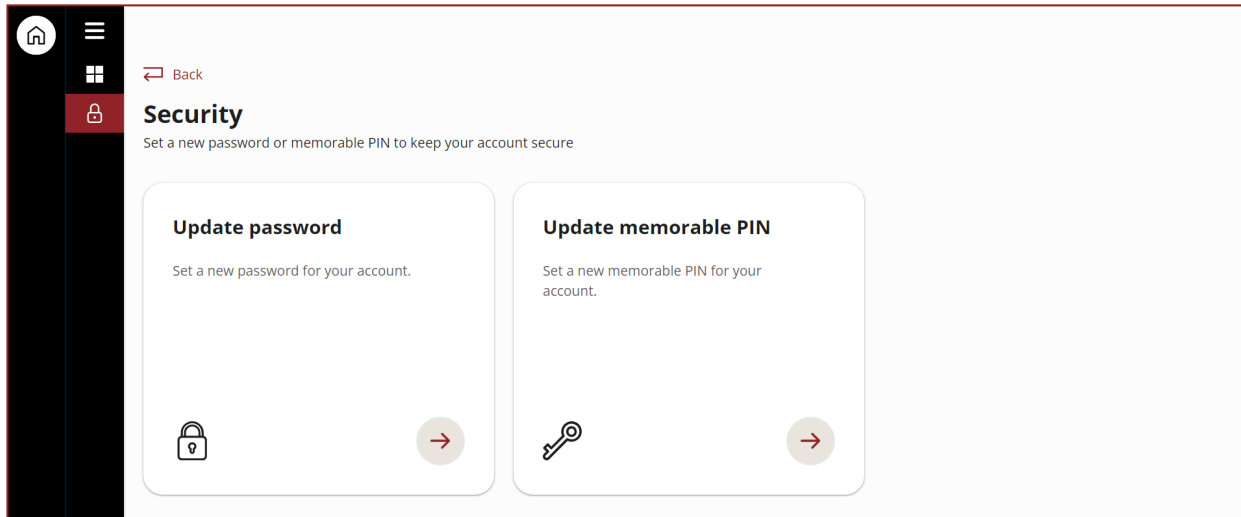
2. Implement

To confirm that you wish to proceed to the final step, click here. [Submit](#)

[Previous step](#)

On the third and final step, the platform will validate all data that has been input. You can then click Submit to complete the edits you have made.

Security user access - Security



This page allows you to update your existing password or memorable pin. It can be accessed under **My admin** (bottom option on navigation bar) for all other users.

Security allows the user to access the unique existing password and memorable pin to amend either one.



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