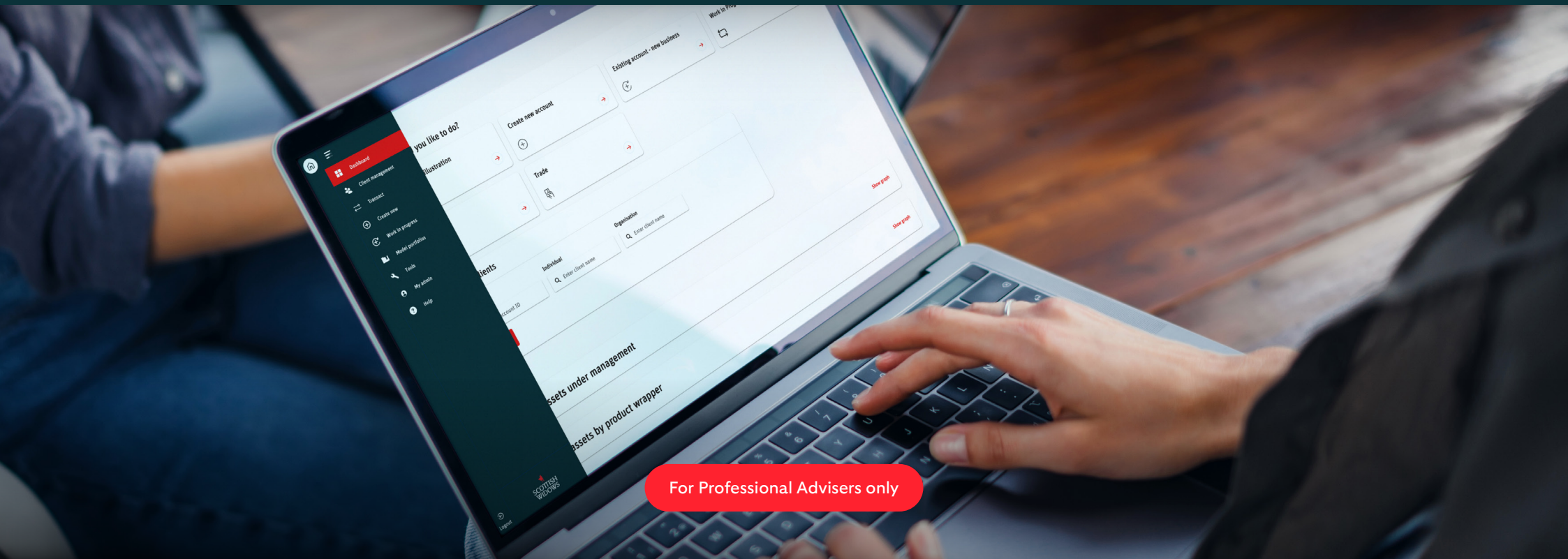
SCOTTISH WIDOWS

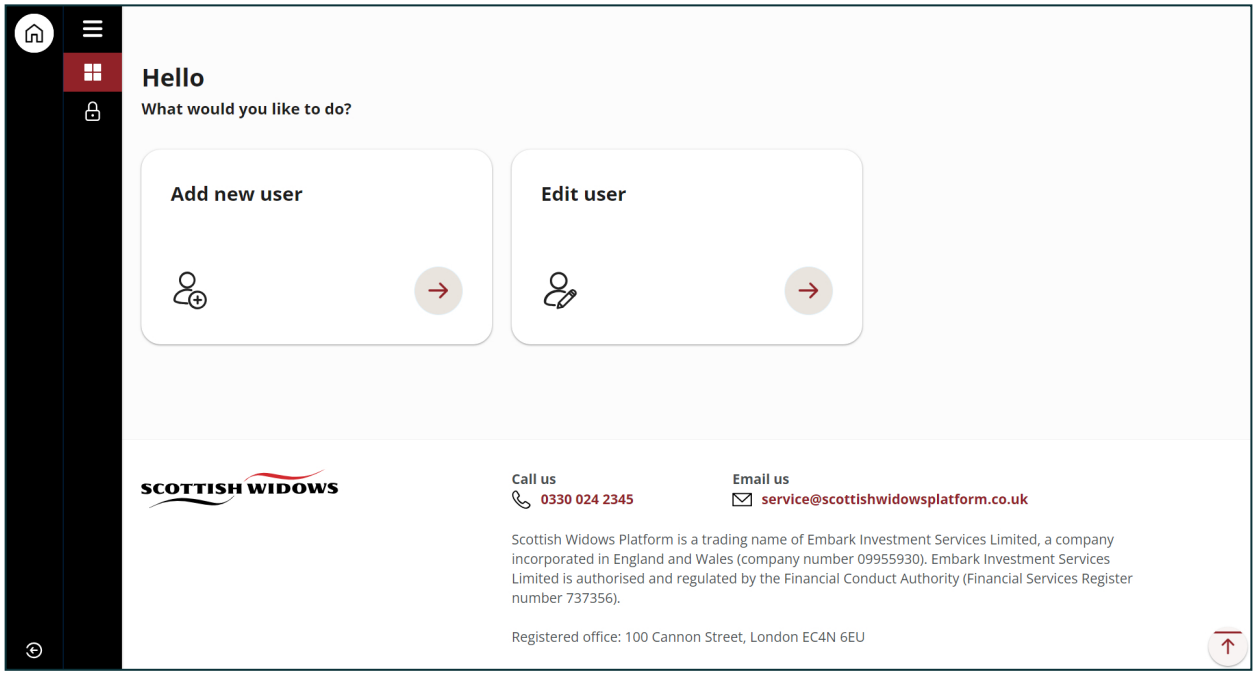
Scottish Widows Platform

Security User Guide



For Professional Advisers only

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.

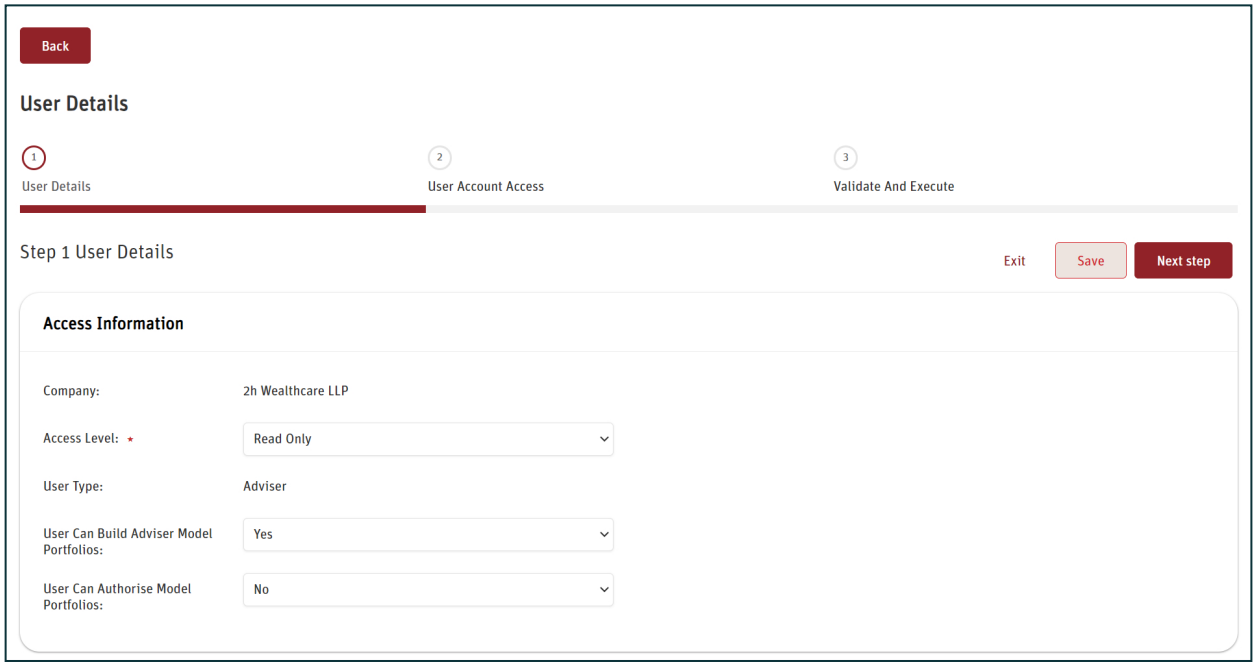
The first section of this guide will help you with adding a new user. Page 6 onwards provides more information on editing existing users.

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

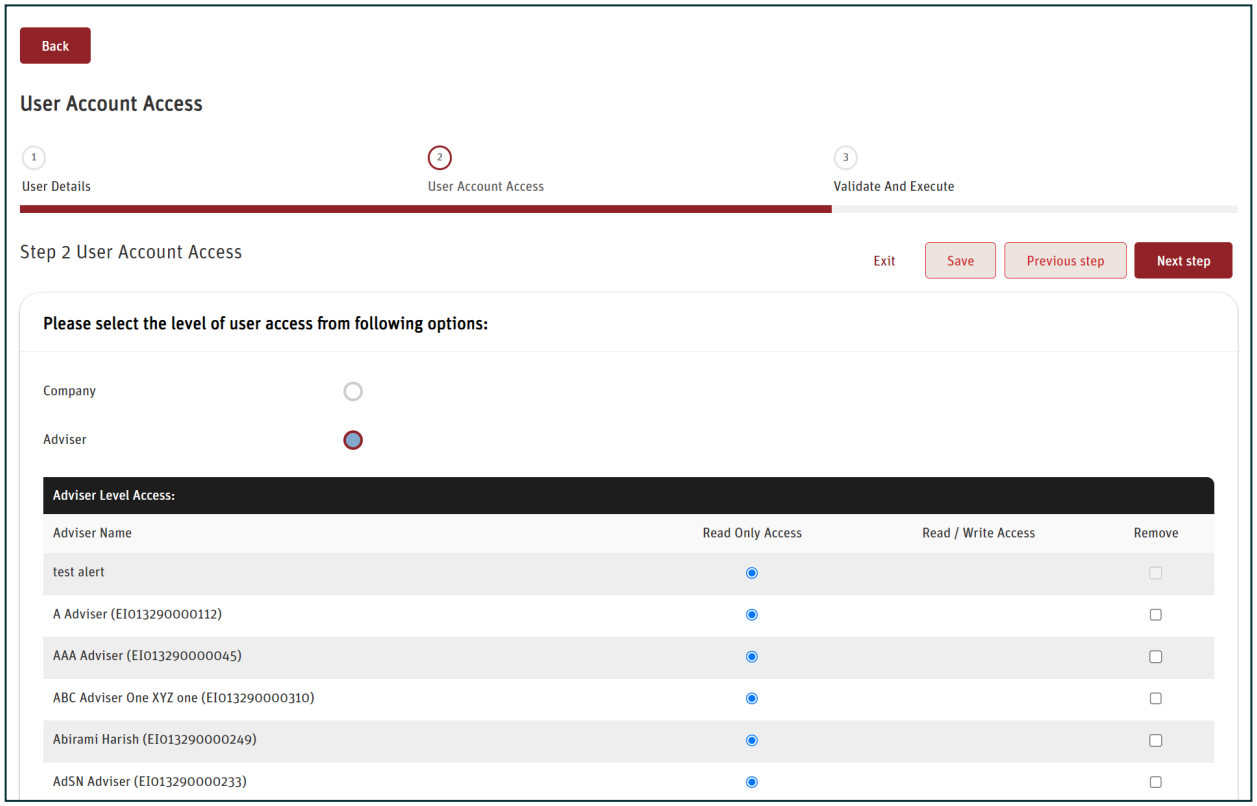


Create new users following the simple three step process.

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.

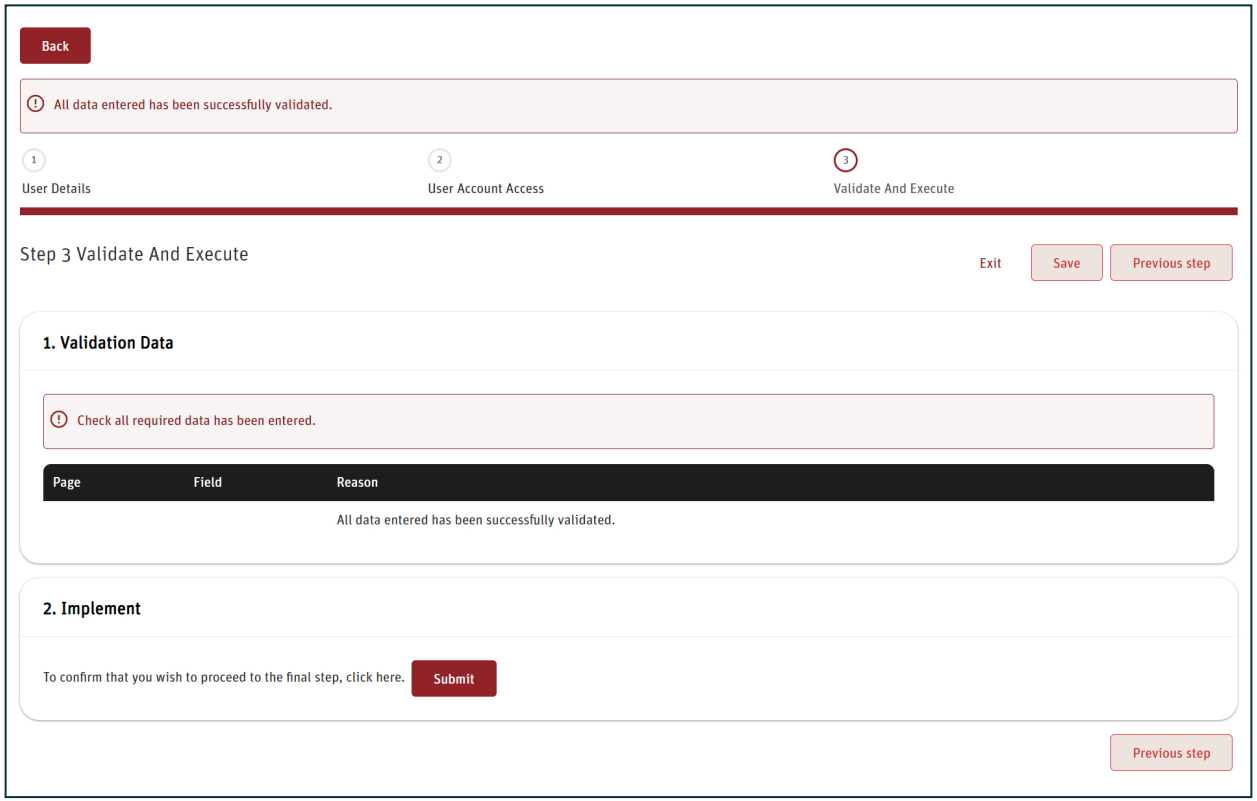
Security user access – New user



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.

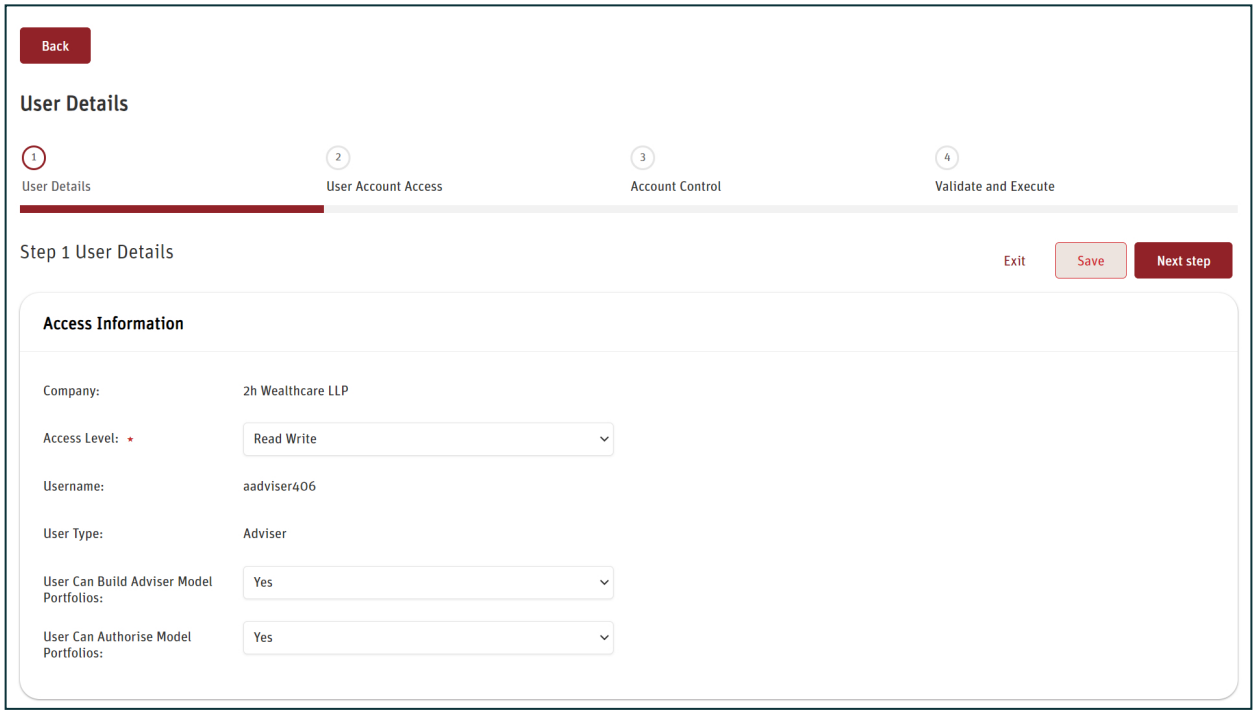
Security user access – New user



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



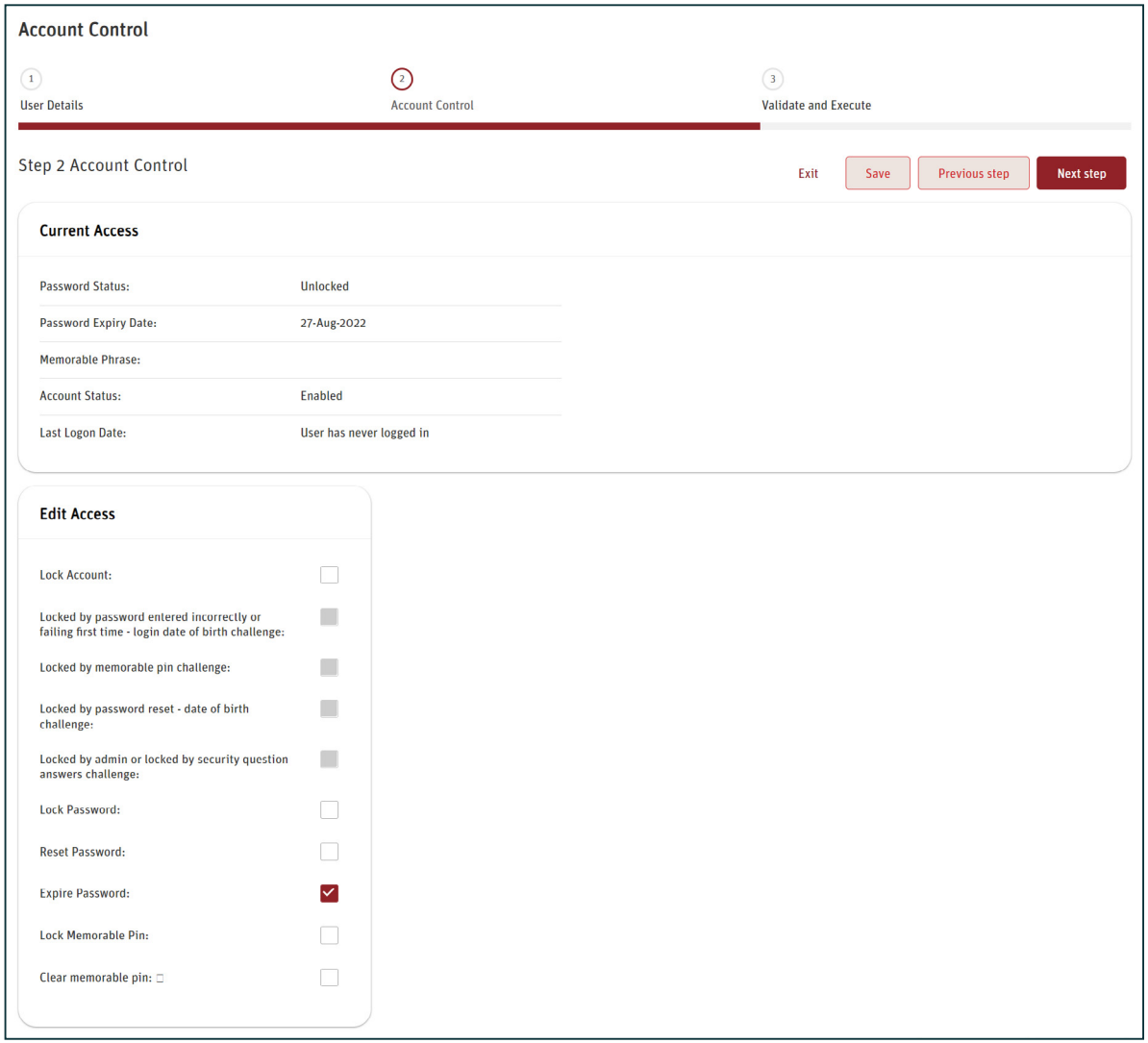
The three step process allows you to amend user access, what the user is linked to and reset passwords.

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

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.

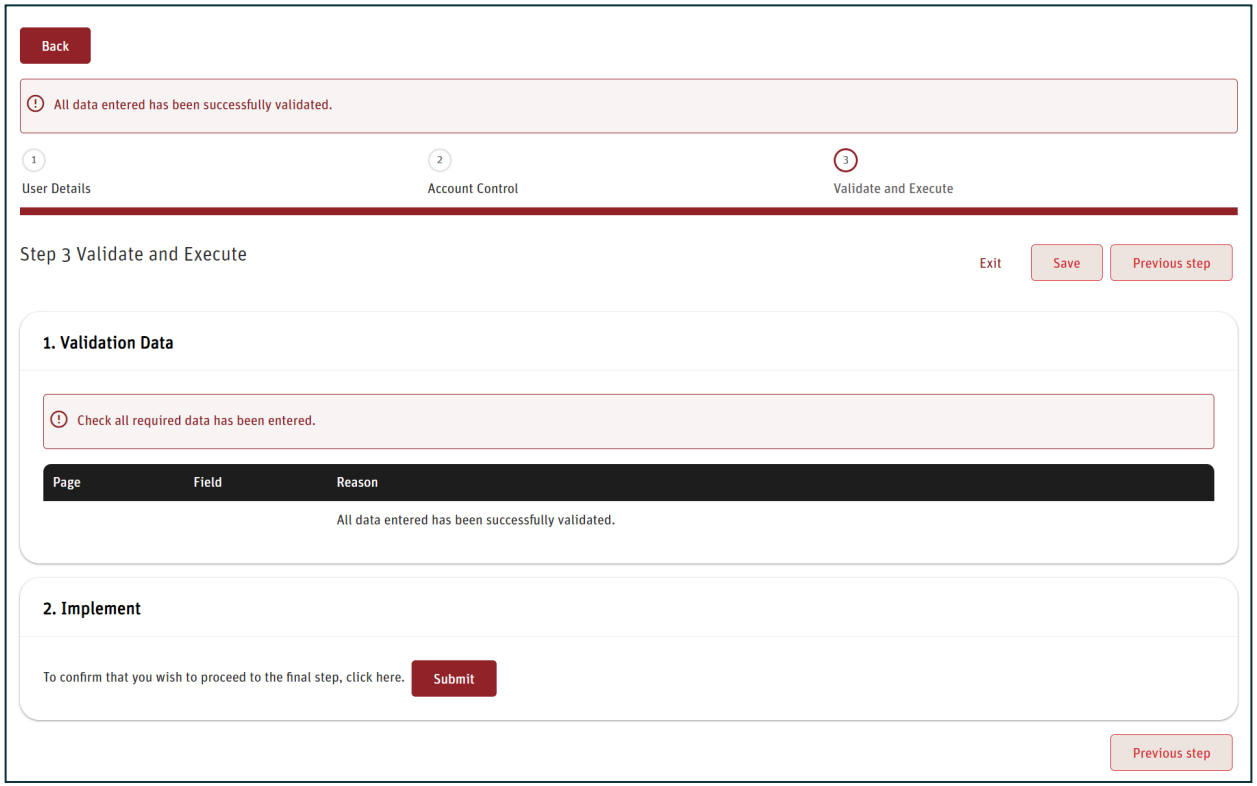
Security user access – Edit user



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

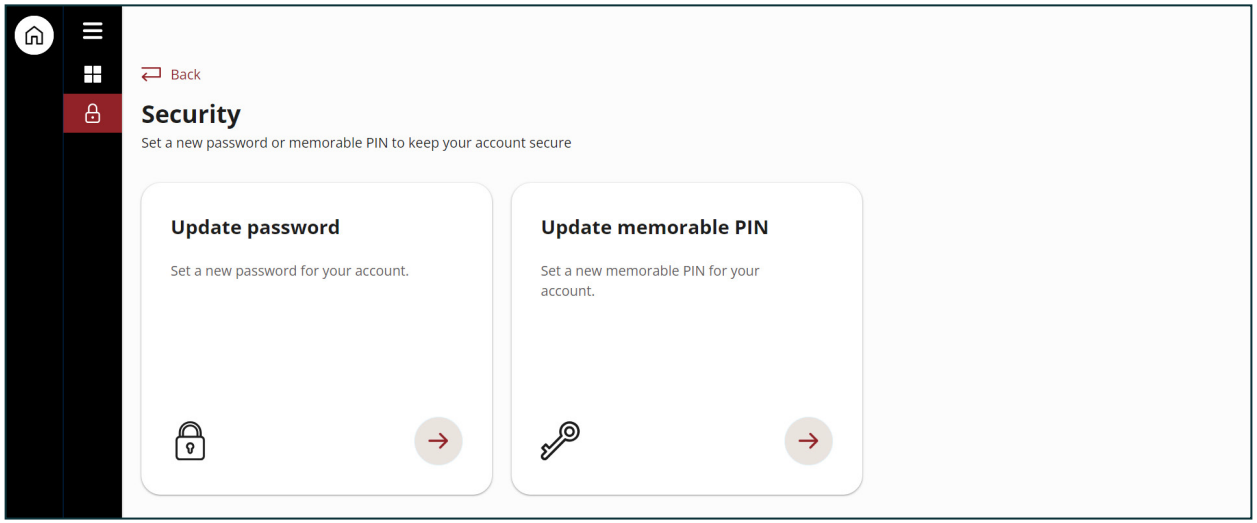
Restrict or expand the users access to either Read Only or Read/Write.

Security user access – Account control



On the third and final step, we 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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SCOTTISH WIDOWS

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