BoC Connect

LRA (Local Registration Authority) Guide

BoC Connect LRA Guide

This guide provides step-by-step instructions on processes that can be performed by a Local Registration Authority (LRA) on behalf of an organization.

Contents

What is BoC Connect?

The Bank of Canada (Bank) is modernizing its **Secure Site** service. Secure Site is a secure web portal that organizations log into to access the Regulatory Reporting System (RRS). Current users will gradually be transitioned to the new site, called **BoC Connect**.

ADMINISTRATIVE FUNCTIONS

The **BoC Connect** service allows LRAs to manage BoC Connect profiles for users within their organizations. As an LRA, you can generate requests for your Bank of Canada Business Application Support (BAS) team to:

- create new BoC Connect user profiles

- change the access to Bank applications for existing user profiles

- assign a user to act as an LRA

You can also view existing user profiles, update existing user profile information and unlock user profiles. These functions do not require you to contact the Bank.

SIMPLIFIED LOGIN

With BoC Connect, you perform these administrative functions through a secure website. Access to the site requires you to log in with a username and password. In some circumstances, enhanced authentication may be required, in which case an **advanced authentication code (AAC)** is emailed to you to complete the login process.

USING BoC CONNECT

As part of the transition to BoC Connect, you will be provided with a BoC Connect profile with a username and temporary password. Using these, you will complete the set up of your profile as described in this guide and begin accessing the service.

What am I responsible for as an LRA?

As an LRA, you are the first point of contact for BoC Connect/RRS users in your organization. You are responsible for managing their user profile accounts. Your responsibilities may also include acting as a contact for Bank of Canada support personnel.

To ensure that you can confirm your identity (as an LRA) for this contact, you may be given an **LRA code word** when you are assigned as an LRA for your organization. If a code word has been assigned, an email notification will be sent to your business email address with the code to be used.

BoC Connect LRA Code Word Email

> **From:** BoC Connect
> **Sent:** March 15, 2019 4:52 PM
> **To:** [LRA Business Email Address]
> **Subject:** BoC Connect LRA Code Word / le mot de code ALE dans Connexion Banque
>
> The Business Application Support team has set your LRA Code Word to be **65747ryt**. Please keep this code word secure as you will need to provide this code word to identify yourself to Business Application Support and other Bank of Canada personnel.
>
> L'Équipe du soutien des applications a défini le mot de code ALE **65747ryt**. Veuillez conserver ce mot de code en lieu sûr, car vous devrez fournir ce mot de code pour vous identifier auprès de ESA et d'autres membres du personnel de la Banque du Canada.

IMPORTANT: Not all Business Application Support teams require an LRA code word, so you may not receive one. Please confirm with your Business Application Support team.
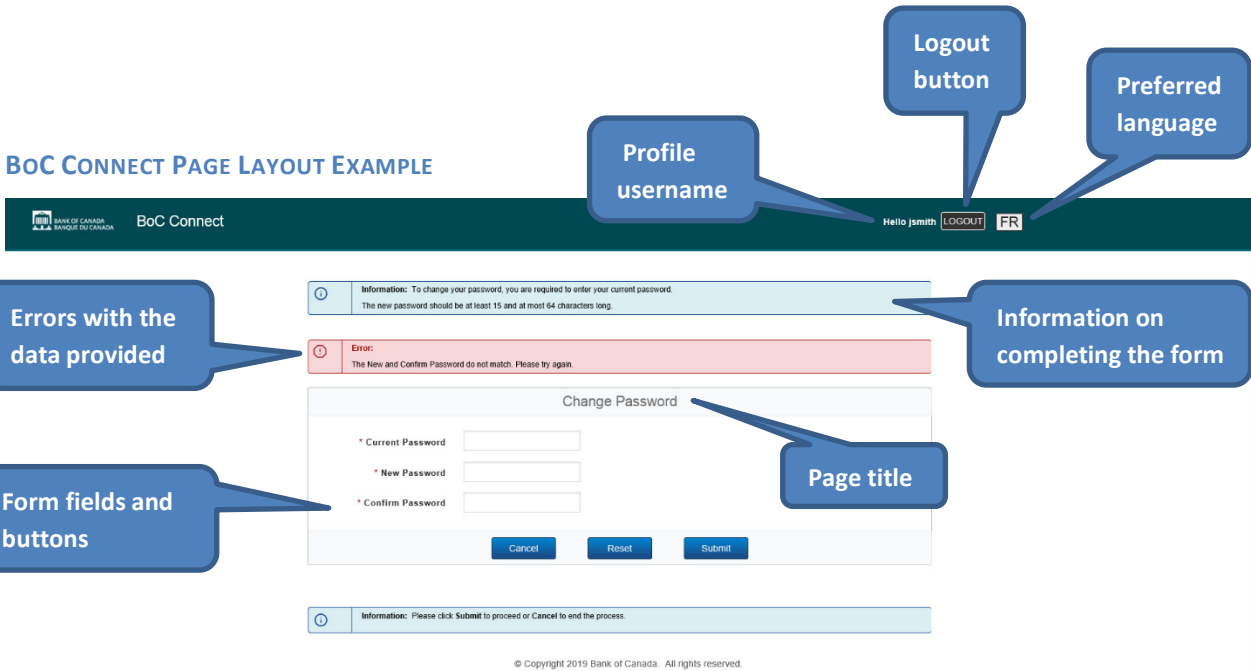
How do I navigate the BoC Connect pages?

As an LRA, you are authorized to use your BoC Connect profile to manage user profiles within your organization and to access the RRS.

BOC CONNECT PAGE LAYOUT

The BoC Connect pages you access have a consistent layout containing the following elements:

- Profile username
- Preferred language button: EN (English) and FR (French)
- Logout button
- Information section to provide tips and help on completing the form on the page
- Error section for all error conditions on the data you submitted on the page
- Page title to identify what page you are currently accessing
- Page form containing fields that require a value (indicated by a red asterisk *) and those that cannot be changed (field is greyed out) and buttons to control the form.

BOC CONNECT PAGE LAYOUT EXAMPLE

How do I log in to BoC Connect?

1. From your preferred browser, go to the following link:
   https://connect-connexion.bank-banque-canada.ca

2. On the **BoC Connect Login** page, enter your username and password and click **Login**.
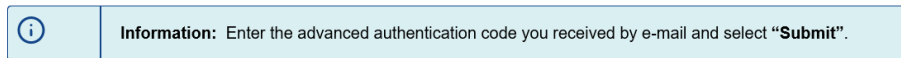
BoC CONNECT LOGIN

3. If the username and password are valid, the login process will proceed. You may also need an AAC to complete the login process. If you are not prompted for an AAC, proceed to Step 7.

4. If you are prompted for an AAC, this code is required to complete the login process. An AAC is sent to your business email address. In the sample email below, the AAC is **15650509**.

> IMPORTANT: If you are using Internet Explorer 11 with a version of Windows other than Windows 10, you will be required to enter an AAC every time you log in. Refer to the FAQ for additional information on when an advanced authentication code may be required.
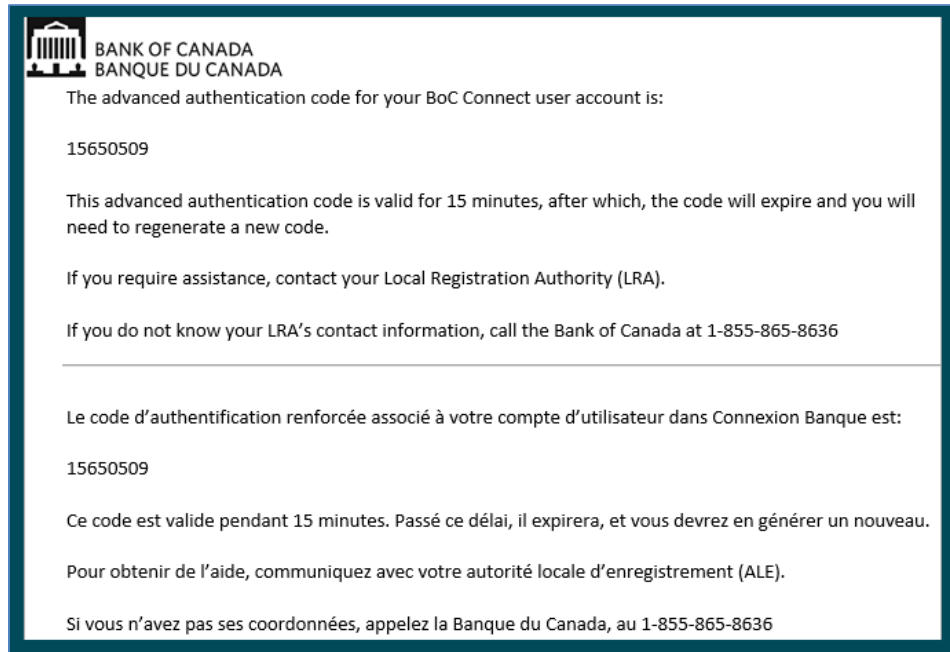
5. The **BoC Connect Advanced Authentication Code** page is displayed. Enter the AAC from the email into the **Advanced Authentication Code** field and click **Submit**.

> ⓘ **Information:** Enter the advanced authentication code you received by e-mail and select **"Submit"**.

> **IMPORTANT: The AAC provided is valid for only 15 minutes, after which it cannot be used. Click on the Regenerate button to have a new AAC sent to your business email address. If you enter an AAC incorrectly five consecutive times, your profile will be disabled as a security measure.**

6. If the AAC you provide is valid, you can proceed. If it is not valid, you can attempt to reenter the code or click **Regenerate** to have a new code sent to your email address.

7. If the profile username and password are valid, the BoC Connect Landing page appears.

BoC Connect Landing Page
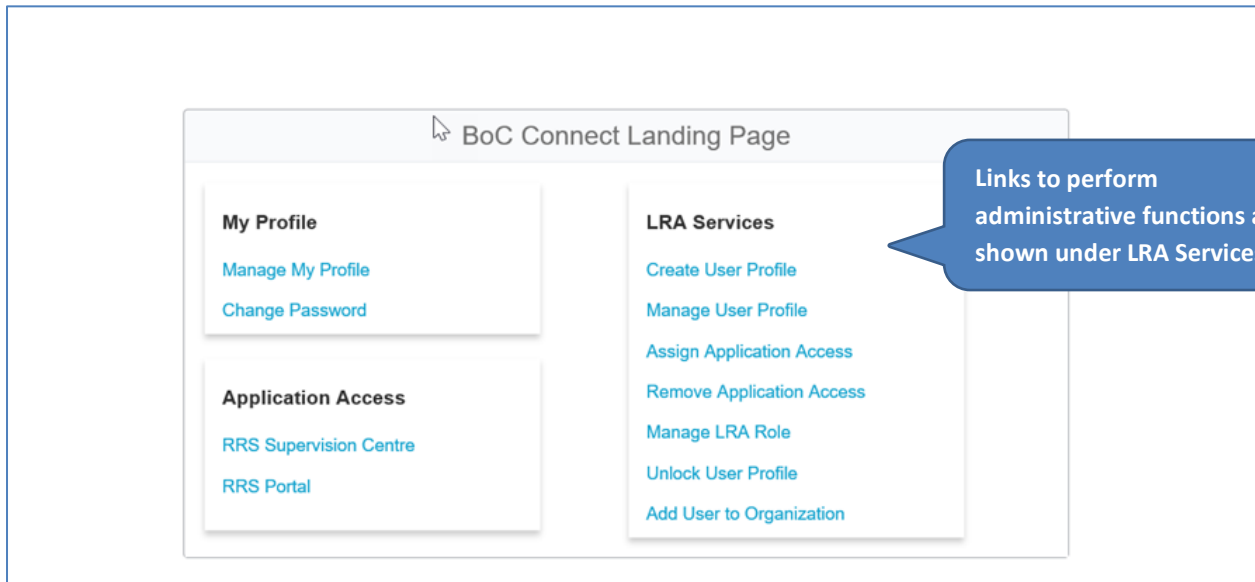
Under the **Application Access** heading are links to each of the RRS applications that you can access. To access an application, click on its link. The application page will open in a separate tab in your browser.
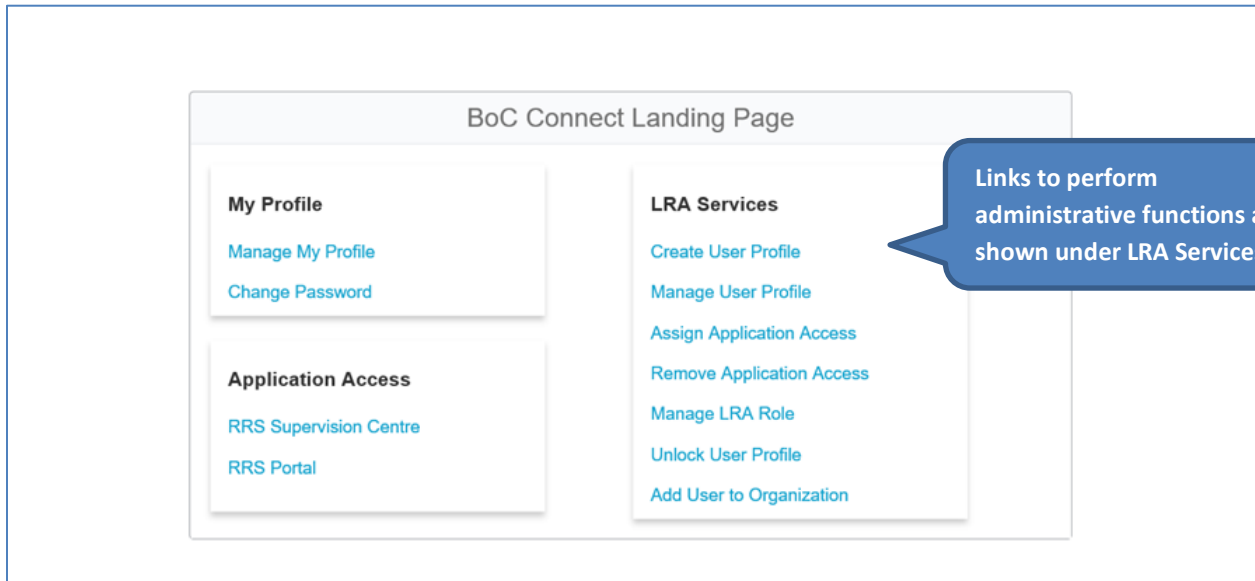
How do I create a new BoC Connect profile?

After logging in, you will see the BoC Connect Landing page, where you can manage BoC Connect profiles for your organization.

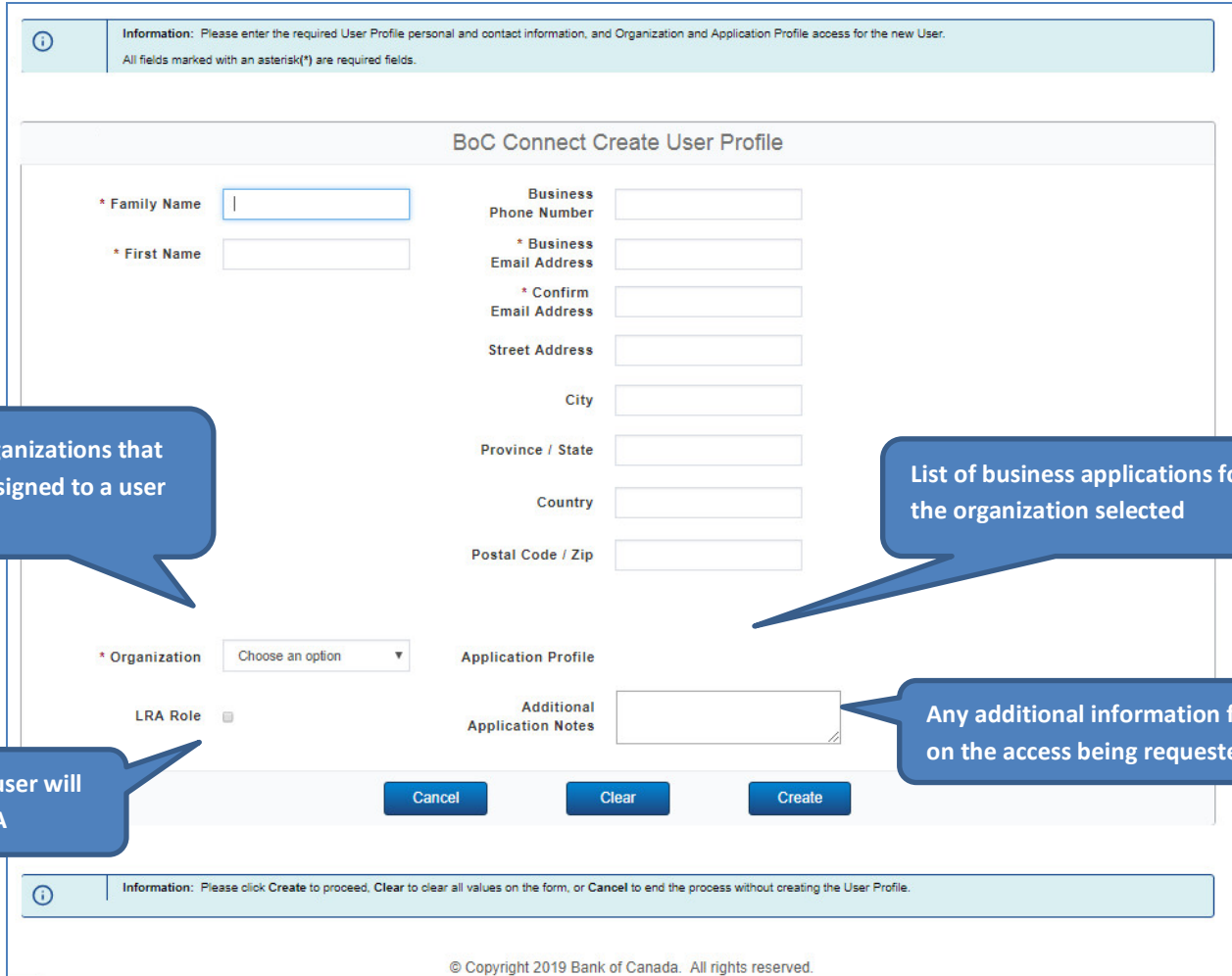To create a new BoC Connect profile for a user in your organization, complete the following steps:

1. Log in to BoC Connect. The BoC Connect Landing page is displayed.

BOC CONNECT LANDING PAGE

2. Click on **Create User Profile** to be directed to the **Create User Profile** page.

BOC CONNECT CREATE USER PROFILE

Information: Please enter the required User Profile personal and contact information, and Organization and Application Profile access for the new User.
All fields marked with an asterisk(*) are required fields.

BoC Connect Create User Profile

* Family Name

* First Name

Business Phone Number

* Business Email Address

* Confirm Email Address

Street Address

City

Province / State

Country

Postal Code / Zip

* Organization   Choose an option ▼

LRA Role ☐

Application Profile

Additional Application Notes

Cancel   Clear   Create

Information: Please click **Create** to proceed, **Clear** to clear all values on the form, or **Cancel** to end the process without creating the User Profile.

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List of organizations that can be assigned to a user

List of business applications for the organization selected

Any additional information for BAS on the access being requested

Check if user will be an LRA

3. Add the required user information, including the user's personal information (family and first name), business email address and business contact information (street address and phone number).

> **IMPORTANT: You must ensure that your business email address is correct. You will receive the advanced authentication code and service notifications from BoC Connect at this email address.**
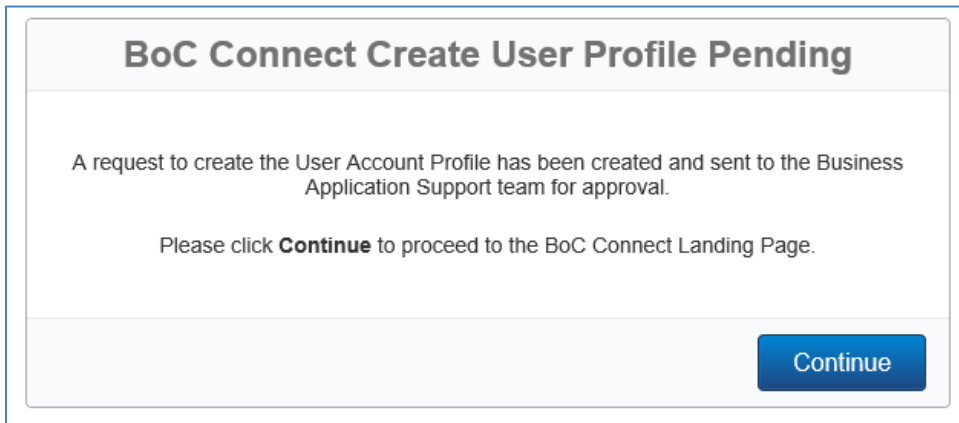
In addition to the user's profile information, you can choose an organization and application that the user can access as well as request that the user be an LRA for the chosen organization.

Fields marked with an asterisk (*) cannot be left blank.

> **IMPORTANT: When you assign access to an application, use the Additional Application Notes field to provide additional information on the entitlements to be granted within the application selected. This information is provided to the BAS team through the request.**

4. Click **Create** to validate the request. If you make a mistake, click **Clear** to clear all values on the form or **Cancel** to cancel the process and return to the BoC Connect Landing page.

5. If the data submitted are valid, a pending request is generated and sent to the BAS team to review, and you will be directed to the **Create New User Profile Pending** page.

BOC CONNECT CREATE USER PROFILE PENDING

6. Click **Continue** to return to the BoC Connect Landing page.

When the BAS team approves or denies the request, you are sent an email indicating the status of the request. A sample email follows.

BOC CONNECT USER ACCOUNT CREATION APROVED EMAIL

How do I update a BoC Connect profile?

To update an existing BoC Connect profile for a user in your organization, complete the following steps:

1. Log in to BoC Connect.

2. Click on **Manage User Profile**. You will be directed to the **BoC Connect Organization Search** page, where you can search for the user profile that you want to update.

BOC CONNECT ORGANIZATION SEARCH PAGE

3. From the Organization drop-down list select the required organization. The list of users for the organization is displayed. Click the radio button for the required user profile. Click **Select** to be directed to the **Manage User Profile** page or **Cancel** to cancel the process and return the BoC Connect Landing page.

BoC CONNECT MANAGE USER PROFILE

4. Update the required user information, including the user's personal information (first and last name), business contact information (street address and phone number) and business email address. Fields marked with an asterisk (*) cannot be blank.

> **IMPORTANT: You must ensure that your business email address is correct. You will receive the advanced authentication code and service notifications from BoC Connect at this email address.**

5. Click **Update** to update the profile information. If you make a mistake, click **Revert** to return all fields on the form back to their original values or **Cancel** to cancel the process and return to the BoC Connect Landing page.

6. If the data submitted are valid, you will be directed to the **Manage User Profile Complete** page.

BOC CONNECT MANAGE USER PROFILE COMPLETE
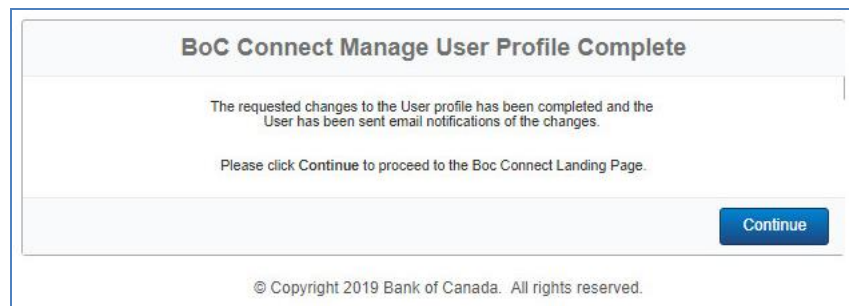
7. Click **Continue** to return to the BoC Connect Landing page.
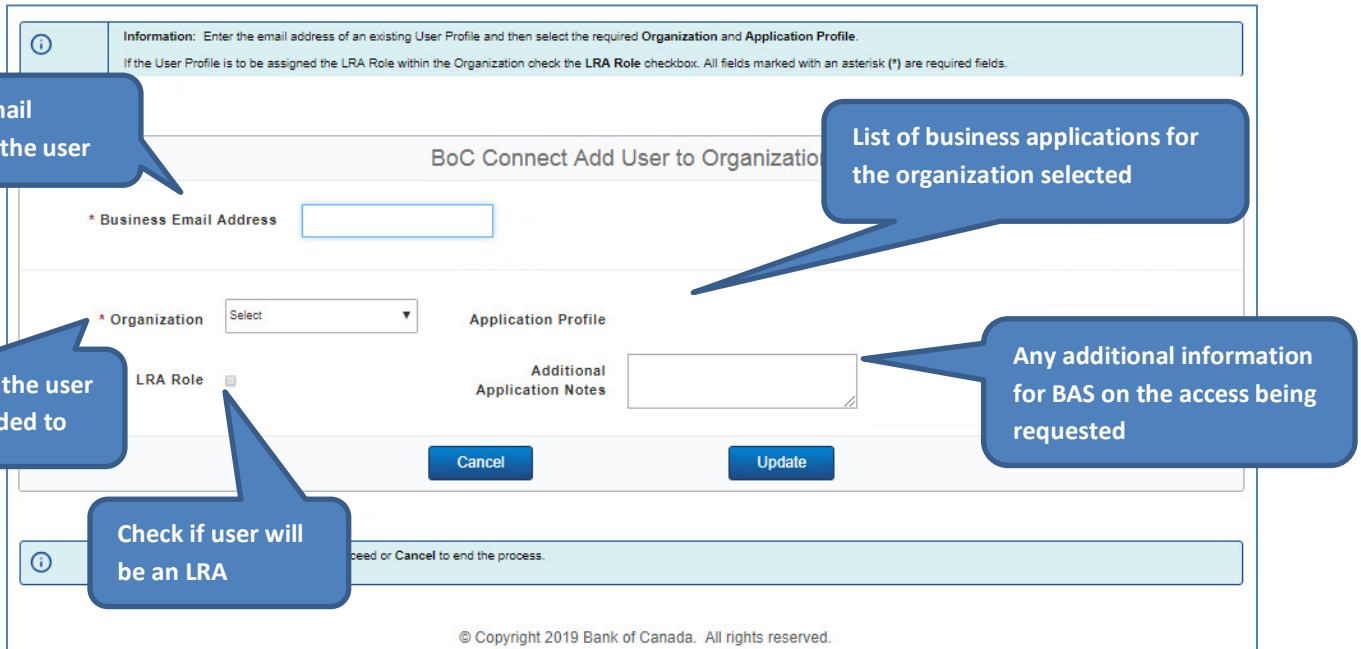
Once a user's profile has been updated successfully, an email notification is sent to the user's business email address.

How do I add an existing BoC Connect user to my organization?

To add an existing BoC Connect user profile to your organization and assign access (if the user does not already belong to your organization), complete the following steps:

1. Log in to BoC Connect.

2. Click on **Add User to Organization**. You will be directed to the **BoC Connect Add User to Organization** page to identify the user profile to be added to your organization and the required access.

BoC Connect Add User To Organization Page

3. Enter the business email address of the user in the **Business Email Address** field. This email address will be used to search for an existing BoC Connect profile.

4. From the **Organization** drop-down list, select the organization this user will be added to, and from the **Application Profile** drop-down list, select the application the user is being granted access to (if applicable).

    If the user will be an LRA for the selected organization, click on the **LRA Role** checkbox.

> **IMPORTANT: BoC Connect will search for an existing BoC Connect user profile with the specified email address and add the profile to the specified organization with the specified access.**

5. Click **Update** to validate the request or **Cancel** to return to the BoC Connect Landing page.

6. If the data submitted are valid, a pending request is generated and sent to the BAS team to review, and you will be directed to the **BoC Connect Add User to Organization Pending** page.

BoC Connect Add User to Organization Pending

7. Click **Continue** to return to the BoC Connect Landing page.

When the BAS team approves or denies the request, you are sent an email notification indicating the status of the request. The following is an example of a request that has been approved.

BoC Connect Assign Application Access Approved Email

Once a user's profile has been updated, an email notification is sent to the user's business email address.

How do I assign application access to someone in my organization?

1. Log in to BoC Connect.

2. Click on **Assign Application Access**. You will be directed to the BoC Connect Organization Search page, where you can search for the user profile that you want to assign application access to.

BoC Connect Assign User Access User Search Page

3. Select your organization from the **Organization** drop-down list. The list of users for the organization is displayed. Click the radio button for the required user profile.

4. Click **Select** to be directed to the **BoC Connect Assign Application Access** page or **Cancel** to cancel the process and return the BoC Connect Landing page.

BOC CONNECT ASSIGN APPLICATION ACCESS PROFILE INFORMATION


IMPORTANT: If the user already has access to all available applications for the selected organization, no options will be available in the drop-down list.

Fields marked with an asterisk (*) cannot be blank.

5. Click **Assign** to submit the request. If you make a mistake, click **Revert** to return all fields on the form back to their original values or **Cancel** to cancel the process and return to the BoC Connect Landing page.

6. If the data submitted are valid, a pending request is generated and sent to the BAS team to review and you will be directed to the **BoC Connect Application Access Request Pending** page.

BOC CONNECT APPLICATION ACCESS REQUEST PENDING
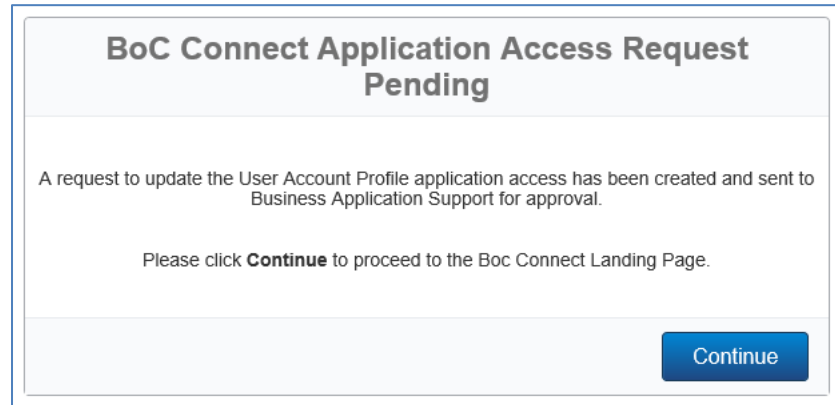
When the BAS team approves or denies the request, you are sent an email notification indicating the status of the request. The following is an example of a request that has been approved.

BOC CONNECT ASSIGN APPLICATION ACCESS APPROVED EMAIL
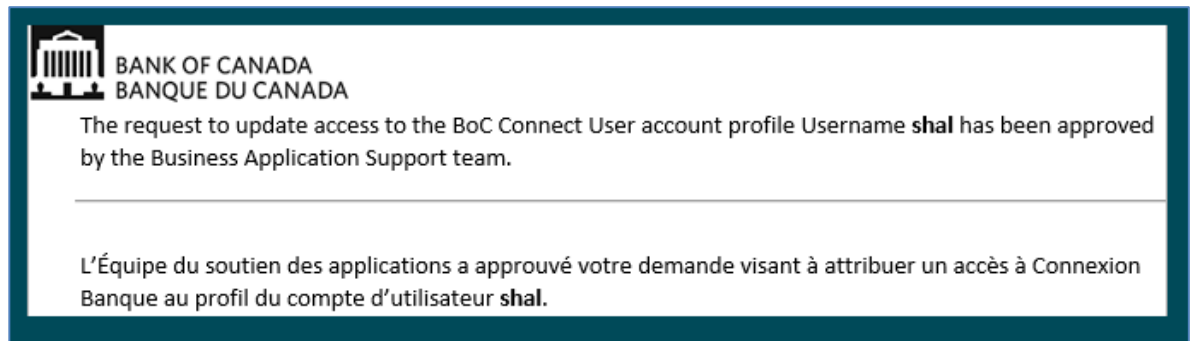
Once a user's profile has been updated, an email notification is sent to the user's business email address.

How do I remove application access from someone in my organization?

1. Log in to BoC Connect.

2. Click on **Remove Application Access**. You will be directed to the BoC Connect Organization Search page, where you can search for the user profile you want to remove application access from.

BOC CONNECT REMOVE USER ACCESS USER SEARCH PAGE

3. Select your organization from the **Organization** drop-down list. The list of users for your organization is displayed. Click the radio button for the required user profile.

4. Click **Select** to be directed to the **Remove Application Access** page or **Cancel** to cancel the process and return to the BoC Connect Landing page.

BoC Connect Remove Application Access Profile Information

5. From the **Organization** drop-down list, select the required organization. From the **Application Profile** drop-down list, select the application to be removed.

> **IMPORTANT: If all access application access is removed, the user is removed from your organization and will not appear in subsequent organization searches—unless the user is also an LRA for your organization.**

Fields marked with an asterisk (*) cannot be blank.

6. Click **Remove** to submit the request. If you make a mistake, click **Revert** to return all fields on the form back to their original value or **Cancel** to cancel the process and return to the BoC Connect Landing page.

7. If the data submitted are valid, a pending request is generated and sent to the BAS team to review and you will be directed to the **Remove Application Acess Pending** page.

BOC CONNECT APPLICATION ACCESS REQUEST PENDING
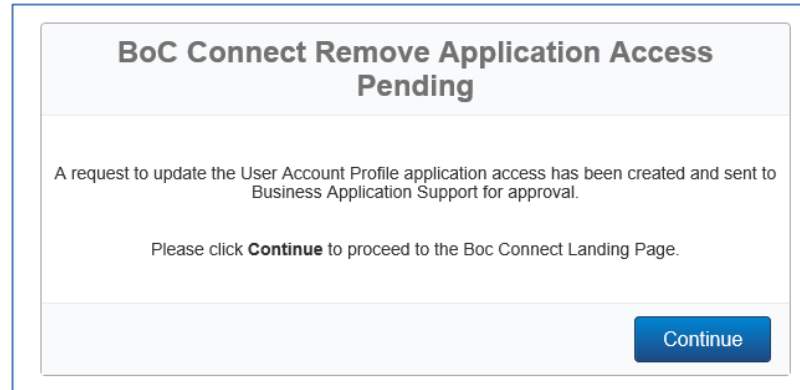
8. Click **Continue** to return to the BoC Connect Landing page.

When the BAS team approves or denies the request, you are sent an email notification indicating the status of the request. The following is an example of a request that has been approved.

BOC CONNECT ASSIGN APPLICATION ACCESS APPROVED EMAIL
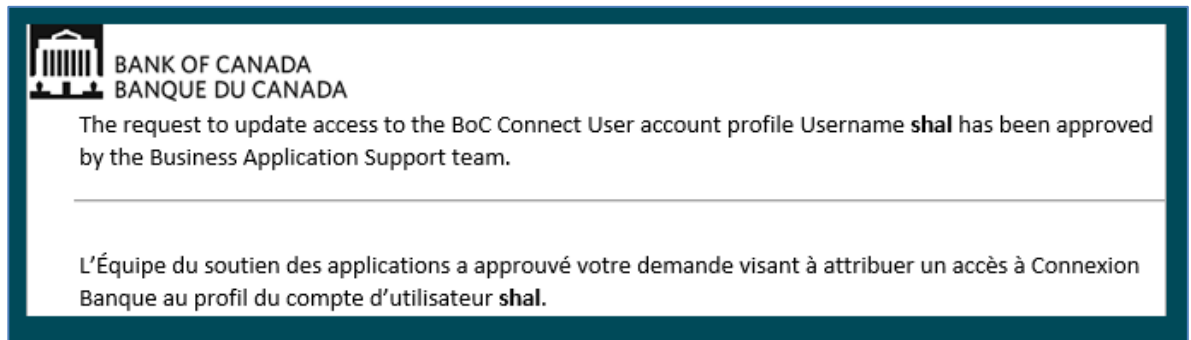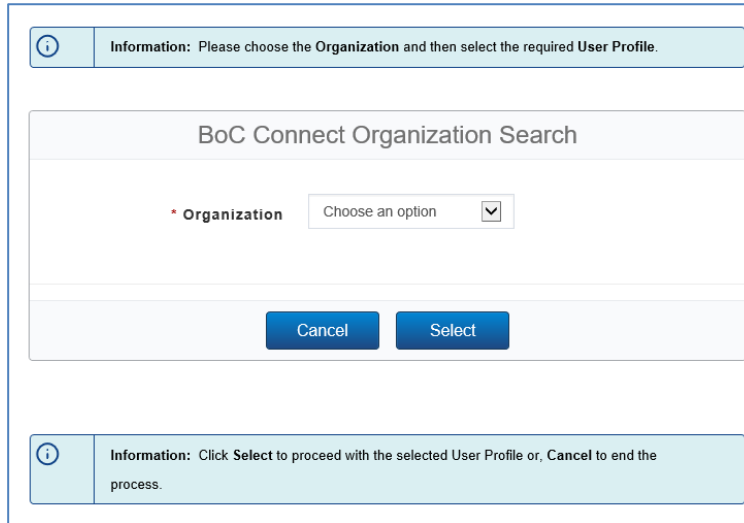
Once a user's profile has been updated, an email notification is sent to the user's business email address.

How do I manage who is an LRA for my organization?

1. Log in to BoC Connect.

2. Click on **Manage LRA Role**. You will be directed to the **BoC Connect Organization Search** page, where you can search for the required user profile.

BoC Connect Organization Search Page

3. Select your organization from the **Organization** drop-down list. The list of users for the organization is displayed. Click the radio button for the required user profile.

4. Click **Select** to be directed to the **Manage LRA Role** page or **Cancel** to cancel the process and return the BoC Connect Landing page.

BOC CONNECT MANAGE LRA ROLE PROFILE INFORMATION

Information: Please select Add LRA Role or Remove LRA Role for the User profile.

BoC Connect Manage LRA Role

* Family Name	smith	Business Phone Number	
* First Name	testlra	* Business Email Address	testlra99.smith@gmail.com
Registration Date	2019/05/14	Username	smit9
Status	Enabled		
* Organization	Choose an option	* Add LRA Role	○
		* Remove LRA Role	○

Select the organization and then choose Add or Remove LRA Role

Cancel   Update

...se click **Update** to proceed or **Cancel** to end the process.

5. From the **Organization** drop-down list, select your organization and then

- check the **Add LRA Role** radio button if the user is to be assigned as an LRA for the organization

- check the **Remove LRA Role** radio button if the user is to be removed as an LRA for the organization

Fields marked with an asterisk (*) cannot be blank.

6. Click **Update** to submit the request or **Cancel** to cancel the process and return to the BoC Connect Landing page.

7. If the data submitted are valid, a pending request is generated and sent to the BAS team to review and you will be directed to the **Manage LRA Role Pending** page.

BOC CONNECT MANAGE LRA ROLE PENDING
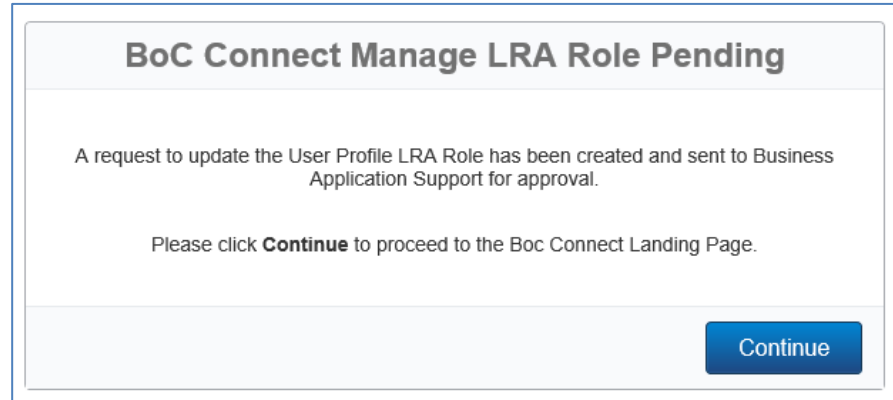
8. Click **Continue** to return to the BoC Connect Landing page.

When the BAS team approves or denies the request, you are sent an email notification indicating the status of the request. The following is an example of a request that has been approved.
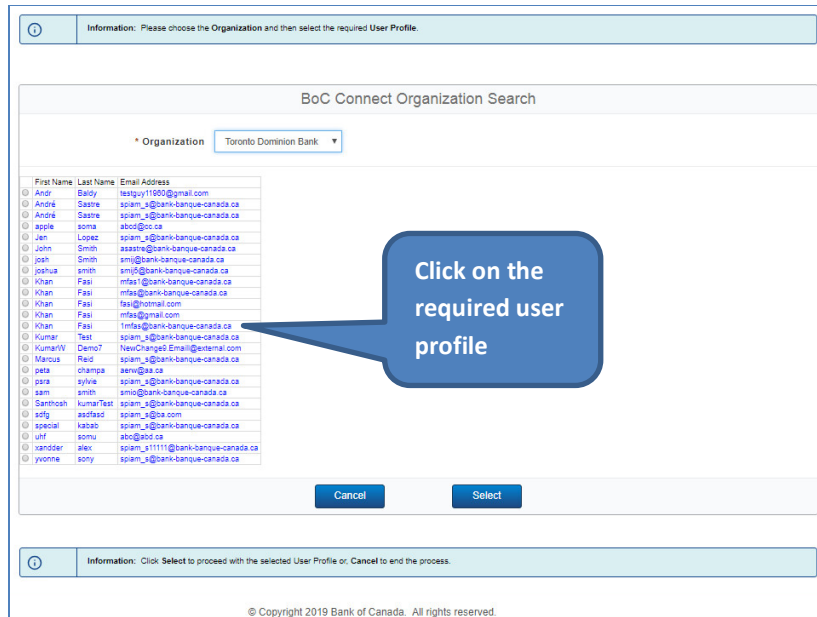
BOC CONNECT ASSIGN APPLICATION ACCESS APPROVED EMAIL
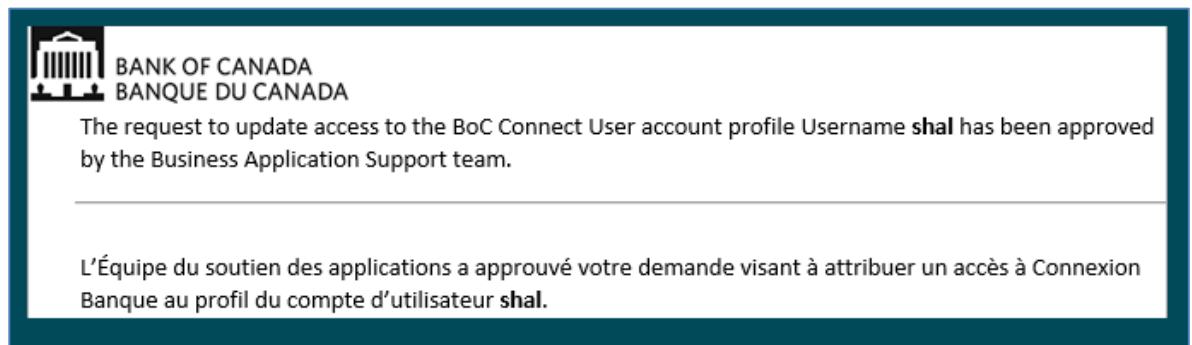
Once the user's profile has been updated, an email notification is sent to the user's business email address.

How do I unlock a BoC Connect profile?
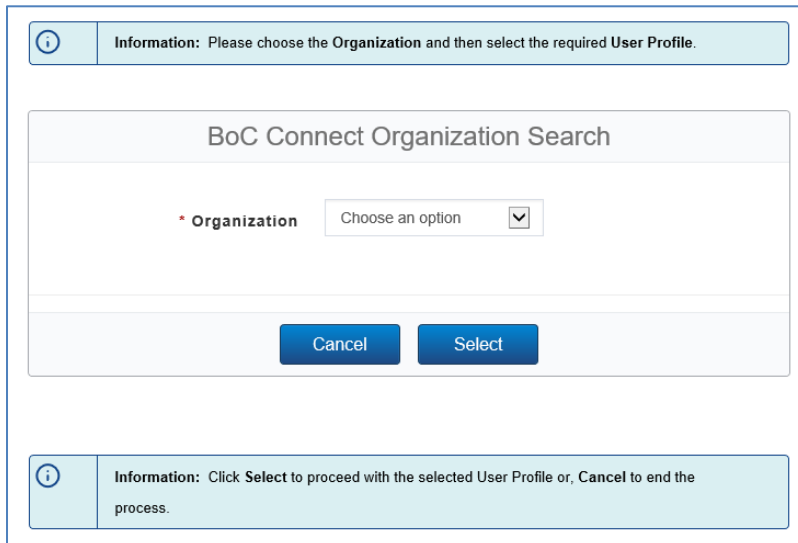
A BoC Connect profile will be locked after five unsuccessful **password** entries or five unsuccessful **AAC** entries.

An LRA can unlock a profile only if it was locked due to five unsuccessful **password** entries. Contact the Bank of Canada's Service Desk to have a profile unlocked that was locked due to five unsuccessful **AAC** entries. See **I need help performing my LRA functions** for Service Desk contact information.
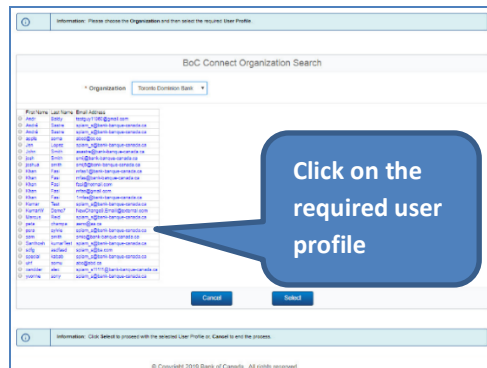
To unlock a user profile that was locked after five unsuccessful password entries, complete the following steps.

1. Log in to BoC Connect.

2. Click on **Unlock User Profile**. You will be directed to the BoC Connect Organization Search page, where you can search for the user profile you want to update.

BOC CONNECT UNLOCK USER PROFILE USER SEARCH PAGE
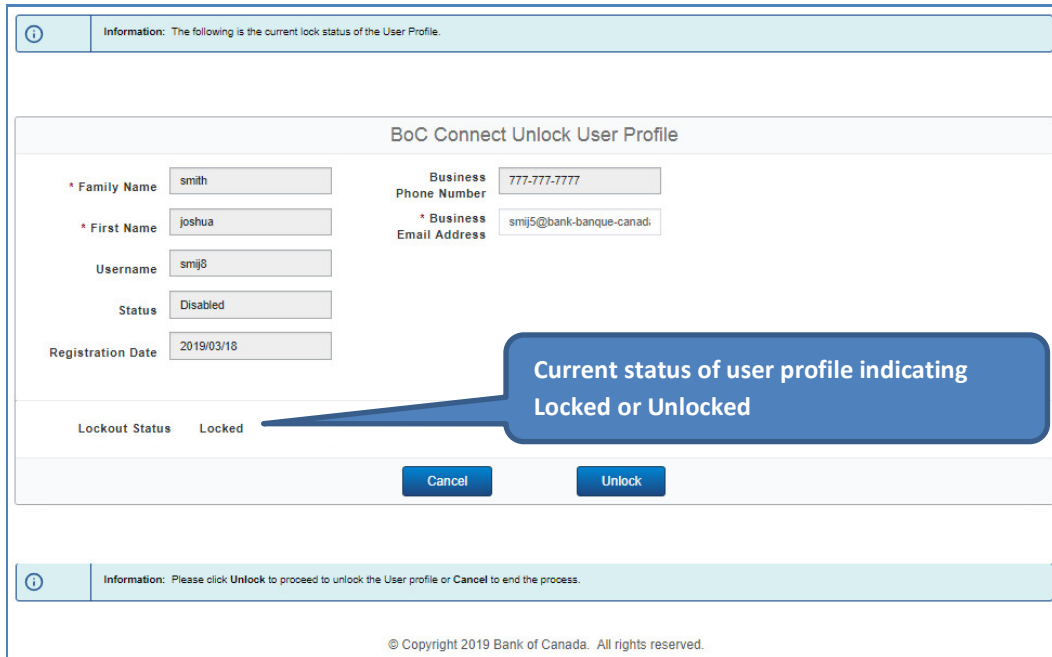
3. Select your organization from the **Organization** drop-down list. The list of users for the organization is displayed. Click the radio button for the required user profile.

4. Click **Select** to be directed to the **BoC Connect Unlock User Profile** page for the selected user profile or **Cancel** to cancel the process and return the BoC Connect Landing page.
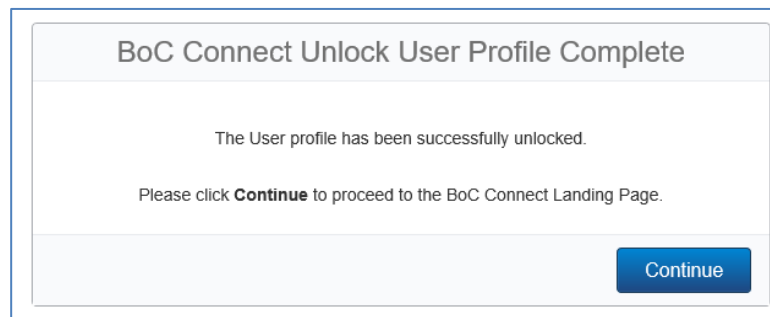
5. Click **Unlock** to unlock the selected user profile or **Cancel** to cancel the process and return to the BoC Connect Landing Page.

6. Once the profile has been succesfully unlocked, you will be directed to the **Unlock User Profile Complete** page.

7. Click **Continue** to return to the BoC Connect Landing page. Once the process has been completed, an email is sent to the user's business email address indicating that their profile has been unlocked.

I need help performing my LRA functions

If you need further assistance performing your LRA functions, please contact **BoC Connect Support**:

☎ 1-855-865-8636—select your preferred language and then select **Option 2** (*Secure Site or BoC Connect Support)*

✉ BoCConnect-ConnexionBanque@bank-banque-canada.ca

FAQ (Frequently Asked Questions)

1. **Why am I not receiving any BoC Connect email notifications for my profile?**

   BoC Connect sends email notifications to the business email address in your profile. Confirm that the business email address in your profile is correct. Refer to the guide for information on how to view your profile information and update your email address if needed.

   If you are not able to update your profile, please refer to the section **I need help performing my LRA functions**.

2. **Why am I required to provide an advanced authentication code (AAC)?**

   An AAC provides an additional level of security when you access Bank of Canada business applications. An AAC may be required when you log in into BoC Connect if any of the following is true:

   a. You are logging into BoC Connect for the first time
   b. You are using a shared workstation
   c. You are using a new personal workstation or your personal workstation was recently upgraded (including installation of a new operating system version or security patches)
   d. You are using a different web browser from your previous login or your existing browser was upgraded (including installation of new patches or plug-ins)
   e. You are using Internet Explorer 11 with a version of Windows other than Windows 10 (an AAC is required for every login).

3. **I should have access to LRA Services, but I do not see it available on the BoC Connect Landing page.**

   If you believe that you should be an LRA but you do not see the **LRA Services** links, refer to the section **I need help performing my LRA functions**.

4. **What browsers can I use to access BoC Connect?**

   BoC Connect supports the use of these browsers:

   a. Google Chrome 58
   b. Microsoft Internet Explorer (IE) 11 or Edge
   c. Firefox ESR52

   Javascript **must** be enabled on the browser being used to access BoC Connect. To confirm whether Javascript is enabled or to have it enabled, refer to browser documentation.

   Use of mobile browsers is **not** supported.

5. **I do not see a user who belongs to my organization.**

   The user you are looking for may not have a BoC Connect profile, or their BoC Connect profile may not have any access for your organization. There are two options to address this issue:

   a. Refer to the section **How do I add an existing BoC Connect user to my organization** to search for the user's profile (by email) and give them the required access (application or LRA role) for your organization. If you cannot find the user using the business email address, use option B below.

   b. The user may not have a BoC Connect profile. If so, create a profile for the user. If this attempt fails, please contact your BAS team or refer to the section **I need help performing my LRA functions**.

6. **Why have I been logged out?**

   The BoC Connect service will automatically log you out if you have been idle for two hours or if your session exceeds 10 hours.