

Settlement Room User and Account Maintenance



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1. Features and Brief Descriptions of Settlement Room

Feature	Description
Settlement Room	Settlement Room is a transaction workspace where all parties in a settlement can gather online to share, compare and agree on information prior to actual settlement.
Results & Billing	Results & Billing allows users to view orders & Results, run invoices & billing reports and organise schedule billing / transactional reports
Account Administration	Account Administration allows account administrators to maintain account and User details within their account.



2. Login

Glossary	
Username	Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).
Password	Depending on the accounts security profile. The default profile that applies to almost everyone has a password between 8 and 30 characters.
Security Settings	SAI Global Properties Standard Security Settings are: Session Timeout 90 minutes; Minimum Password Length 8 characters; Maximum Password Length 30 characters; Password Expiry 0 days; Password Expiry Notification 5 days; Password Reuse History 3 days; Password Attempts 5; User Lock Out Duration 5 minutes.
Forgotten your password?	Forgotten your password allows the user to reset there password by email address or username.





Complete the steps below to login to Settlement Room.

The process time should only take a couple of seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action		
1	Go to https://login.property.saiglobal.com/servlet/CSMLogin		
	SAIG Property Home	Contact	
	ome eProperty Development Transfer Ownership Business & Personal About		
	Welcome to SAI Global Property Fast, convenient online access to all of your property, business & individual search requirements	Sign in Username	
	Try Encompass [™] today – Quicker research, better decisions If you are a lawyer, conveyancer, accountant, auditor, insolvency practitioner, banker, media representative or corporate professional and want to improve your research time and decision making with complex matters while conducting instant document searches, try Encompass now.	Password Submit Forgotten your password?	
	Encompass ⁷⁴ - revolutionary software technology unique to SAI Global Property and available only through Search Manager improves the accuracy and speed of your decision-making by visually mapping the complex relationships and connections between corporate entities, directors, shareholders, Individuals and their assets. The intuitive technology provides instant access to multiple property, business and personal searches while simultaneously		
	providing invaluable analysis of ASIC, ITSA, Land Title and soon PPSR data. Trial Encompass NOW to save maximum time for minimal costs by clicking on the Encompass New' button in your Search Manager men or select the "Visualise with Encompass' button when choosing selected ASIC business searches or personal searches.	*Registration is free - confirmation of registration is subject to qualifying conditions. For non ABN holders, casual credit orders or one-off searches, please call 1300 730 000 for ordering options.	
2	Please call our Hebdesk on 1300 730 000 or email us at expresert/support@salokbal.com/f vou reoure any assistance. On the right hand side of the page enter in Your Username).	
3	Enter in your Password.		
4	Click on Submit.		
Pa	assword Requirements are 8 – 30 Characters.	Sign in	
in their us	ote: If a user has forgotten their password, the user can type	Vsername Password Submit	
follow the	prompts to update their password.	Forgotten your password?	



If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.



2.1 Forgotten Password

Glossary		
Password	Depending on the accounts security profile. The default profile that applies to almost everyone has a password between 8 and 30 characters.	
Security Setting	SAI Global Properties Standard Security Settings are: Session Timeout 90 minutes; Minimum Password Length 8 characters; Maximum Password Length 30 characters; Password Expiry 0 days; Password Expiry Notification 5 days; Password Reuse History 3 days; Password Attempts 5; User Lock Out Duration 5 minutes.	



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Complete the steps below for Forgotten Password at Login.

The process time should only take 2 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action	
1	Go to https://login.property.saiglobal.com/servlet/CSMLogin	
2	On the right hand side of the page click on ' Forgotten your password?'	Sign in Username Password Submit Forgotten your password?
3	Enter in your Username or Email Address.	
	Forgotten Password _k	
	User Name or E-mail Username or E-mail Cancel	Submit
4	Click on Submit.	
5	An Email will be sent to the users email address.	
	PASSWORD RESET An e-mail has been sent to your registered e-mail address. Please follow the instructions in tha Should you not receive the e-mail this feature may be unavailable for your account. Please contract of the e-mail this feature may be unavailable for your account. Please contract of the e-mail this feature may be unavailable for your account. Please contract of the e-mail this feature may be unavailable for your account.	
6	Follow the Prompts from the reset password email.	



If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.



3. Settlement Room Behaviours

Glossary	ssary		
Home	When the user clicks on Home it will take the user to SAI Global's Settlemen homepage. The user will be able to view Recent Matters and the Latest New		
Account Administration	Account Administration link can only be link is found at the top of the homepage. I the link the user will have access to updat Details.	When the Account Administrator clicks on	
	Account Administrator Can Update	Account Administrator Can View Only	
	Phone / Fax / Email	Site	
	Physical Address	Company Name	
	Postal Address	ABN / ACN Number	
	DX Address	Account Code	
	Account Contacts – Primary and Billing	Industry	
	Specify Billing Address	How did you hear about us	
	Invoice Delivery Method		
	Default Order Jurisdiction		
	Default Delivery Methods		
	Add Users		
	Manager User Accounts		
Change My Setails	 When the user hovers over and selects to update their own details. User Details (Username, Full Na Ordering Details; Communication from SAI Global 		
Switch Accounts	 Switch Accounts can only be seen if and internal operator has linked the user to additional accounts. Switch Accounts can be found on the banner of the home page beside the user's name by hovering over . Contact allows the user to contact SAI Global Property by email for chase up of certificates or further information in relation to products. These emails go to epropertysupport@saiglobal.com. 		
Contact			
Logout	Logout enables the user to logout of Sett	lement Room.	



4. User Account Maintenance

4.1 User Account Maintenance - Change Password

Glossary		
Password	Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.	
	Standard Session Timeout 90 minutes Minimum Password Length 8 characters Maximum Password Length 30 characters Password Expiry 0 days Password Expiry Notification 5 days Password Reuse History 3 days Password Attempts 5 User Lock Out Duration 5 minutes	
Security Setting – Session Time out	 Session Time out is the number of minutes of inactivity before system will automatically log you out. Minimum Password Length is the minimum amount of characters required for a password. 	
Security Setting – Minimum Password Length		
Security Setting – Maximum Password Length	Maximum Password Length is the maximum amount of characters allowed for a password.	
Security Setting – Password Expiry	Password Expiry is the number of days before your password must be changed. If password expiry is 0 the password never expires.	
Security Setting – Password Notification Expiry	Password Expiry Notification is the number of days before password expires that the system will notify you. If password expiry is 0 then this redundant.	
Security Setting – Password Reuse History	Password Reuse History is the length of time that the system will remember passwords and disallows reuse.	
Security Setting – Password Attempts	Password Attempts is the number of invalid password attempts before the user is automatically locked out.	
Security Setting – User Lock Out Duration	User Lock Out Duration is the number of minutes that a user is unable to log into the systems following an automatic lockout. A user can contact the Account Administrator or SAI Global Operator to unlock their account sooner then the duration.	



Notes



Complete the steps below Change my Password.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action	
1	On the banner of the page, hover over Your Name ne display user functions.	ext to Contact Help Logout to Welcome John Smith Contact Help Logou Change Password Change My Details
2	Click on Change Password.	
3	Enter in your Current Password.	
4	Enter in a New Password.	Change Your Password
5	In the Confirm New Password Field, enter in the New Password again.	New Password Confirm New Password
6	Click on Save to save changes.	Save
7	A confirmation message will appear.	
8	Click on Ok to confirm changes.	
P	assword Requirements are 8 – 30 Characters.	Sign in Username
their usern page. An e	e: If a user has forgotten their password, the user can type ame and click on 'Forgotten your Password' on the login email link will be emailed to the user. The user will need to prompts to update their password.	



If multiple users use the same email address an error message will appear, the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.



4.2 User Account Maintenance – Update my Profile

Glossary		
Username	Usernames can be between 1 and 50 characters, and can basically contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).	
Password	Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.	
	StandardSession Timeout 90 minutesMinimum Password Length 8charactersMaximum Password Length 30charactersPassword Expiry 0 daysPassword Expiry Notification 5 daysPassword Reuse History 3 daysPassword Attempts 5User Lock Out Duration 5 minutes	
Basic Details	Basic Details is the users name and contact details.	
Default Jurisdiction	Default Jurisdiction is the default page for ordering services in the preferred state. For e.g if you choose VIC, when Property Searches menu will automatically open the VIC Menu.	
New Content Notification	 There are 3 options for users to be notified of completed certificates / orders: Don't notify me at all, I'll check the website myself; Notify me only when all content has arrived and the order is complete; Notify me when any new certificate contact arrives for an order. 	
Default Delivery Methods	Delivery Method of Certificates ordered in SAI Global Website.	
User Initials	User Initials is the user's initials; this can be used for certain billing reports.	
Alternate Address	If a user has a delivery default as mail and their mailing address is different to the company address they can enter these details in the user's profile.	
National Property Bulletin	National Property Bulletin is a free weekly bulletin that is sent to all users	
Service Updates	Service Updates must be selected receive emails about system changes.	
Marketing Materials	Marketing Materials must be selected to receive emails about New Products etc.	



Complete the steps below Update my Profile.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action	
1	On the banner of the page, hover over your Name next display User Functions	to Contact Help Logout to Welcome John Smith C Contact Help Logor Change Password Change My Details
2	Click on Change my Details.	
3	Enter Data or Change the Data in the User Details fields.	
4	Select or check any selections in the Ordering Details	r Initials
5	Select or check any selections in the Communications from SAI Global section.	Communications from SAI Global National Property Bulletin Service Updates Marketing Material
	Click on Update to save changes.	
6	A confirmation message will appear.	
6 7	A confirmation message will appear.	



Administrators have the ability to update all users' details within their account.



4.3 User Account Maintenance - Change Username

Change Username allows the Account Administrator to change a user's username.

Glossary	
Username	Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).



Notes



Complete the steps below to change a **Users Username**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action			
1	On the banner of the page, hover over you display User Functions	r Name next to Contact Help Logout to Welcome John Smith Contact Help Logout Change Password Change My Details		
2	Click on Change my Details.			
3	Click on Change Username under the rela	ted tasks. Related Tasks Reset Password Change Username Manage Account		
4	Enter in the New Username .	Change Username 🕺		
5	Confirm the New Username.	Confirm Username		
6	Click on Confirm to save changes.	Cancel Confirm		
7	A confirmation message will appear.			
8	Click on Ok to confirm changes.			
<u>ດ</u> ເ	Jsername are unique.			



Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).



4.4 User Account Maintenance – Switch Accounts

Glossary	
Switch Accounts	Switch Accounts enables a user to log into the system with one username & password, and move seamlessly from one account to another. Users and Account Administrators will only see this function if a user and/or account administrator has been linked to multiple accounts.
Notes	



Complete the steps below Switch Accounts.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action		
1	On the banner of the page, hover over yo display User Functions.	ur name next to Co	Ontact Help Logout to
2	Click on Switch Account.		
3	Select the Account you would like to switch to. Click on Switch to switch accounts.	Switch Accou Please select the account yo SAI Global Property Division Switch	ou want to switch to
5	The user has now switched accounts.		
	e user will know what account they are in as th me on the banner of the homepage.	e account code will	l appear next to the users



It is the users responsibility to know which account they are in.



5. Account Administrator Maintenance

Glossary					
Company Name	Company Name is the legal name of a firm.				
ABN / ACN Number	ABN = Australian Business Number – relates to GST. ACN = Australian Company Number – the companies identification number.				
Account Code	Account Code is also known as the Client ID. It is a short string of characters that operators can use to search for a client.				
Industry	Industry is the area of business your work is in.				
How did you hear about us?	How did you hear about us? provides information about how our client heard about us i.e. Web, Word of Mouth , Conferences etc.				
Phone / Fax / Email	Phone / Fax / Email are the general contact details for the company.				
Physical Address	Example of a Physical Address is 224-226 Normanby Road Southbank VIC 3006.				
Postal Address	Example of a Postal Address PO Box, GPO Box, Locked Bag.				
DX Address	Example of a DX Address DX 332 Melbourne.				
Account Contacts - Primary and Billing	Examples of Primary Contacts - Directors, Managers, Team Leaders. Examples of Billing Contacts – Accounts / Finance Contact.				
Specify Billing Address	Specify Billing Address allows a client to provide an alternate address for receipt of statements.				
Invoice Delivery Method	Email, Mail, DX.				
Default Order Jurisdiction	Default Jurisdiction is the default page for ordering services in the preferred state. For e.g if you choose VIC, when Property Searches menu will automatically open the VIC Menu.				
Default Delivery Methods	Default Delivery Methods is the default delivery Method of Certificates ordered via SAI Global.				
Add Users	Add Users allows an Internal Operator or Account Administrator to create additional users within their account.				
Manager User Accounts	Manager User Accounts is where the user details such as status, passwords and usernames are maintained.				



Notes



Complete the steps below to Update Company Account Details.

The process time should only take 3 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action				
1	On the banner of the welcome page, click on the Account Administration link. Settlement Room Account Administration				
2	Update details in the Company Information section.				
	Company Information Site SAIG [SAIG] Company Name SAI Global Property Division - Test ABN/ACN 00 000 000 Account Code PCL12696 To change your Company Particulars (Name/Business Number) please email us. Company Contact Phone 1300 730 000 E-mail Address epropertysupport@saiglobal.com How did you hear about us Other				
3	Update details in the Address Details section.				
4	Update details in the Account Contact section.				
5	Update details in the Billing Settings section. Billing Settings Specify Billing Address (if different from Postal Address) Specify Billing DX Address (if required) Invoice Delivery Method Email				
6	Update details in the Ordering Details section. Ordering Details These settings will apply as the default for all users in the account Default Order Jurisdiction VIC Default Delivery Method/s Mail DX				
7	Click on Update to save changes.				
8	A confirmation message will appear.				
9	Click on Ok to confirm changes.				
A sta	andard user will not see the Account Administration link.				





5.1 Add User

Add User allows the Account Administrator & internal operators to create additional users under an account. It is recommended that all users have their own unique log in details for SAI Global Property.

Glossary					
Username	Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).				
Password	Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.				
	Standard Session Timeout 90 minutes Minimum Password Length 8 characters Maximum Password Length 30 characters Password Expiry 0 days Password Expiry Notification 5 days Password Reuse History 3 days Password Attempts 5 User Lock Out Duration 5 minutes				
Basic Details	Basic Details refers to the users name and contact details.				
Default Jurisdiction	Default Jurisdiction is the default page for ordering services in the preferred state. For e.g if you choose VIC, when Property Searches menu will automatically open the VIC Menu.				
New Content Notification	 There are 3 options for users to be notified of completed certificates / orders via SAI Global website: Don't notify me at all, I'll check the website myself; Notify me only when all content has arrived and the order is complete; Notify me when any new certificate contact arrives for an order. 				
Default Delivery Methods	Default Delivery Methods is the delivery method of certificates ordered				
User Initials	User Initials are the user's initials; These are used on certain billing reports.				
Alternate Address	If a user has 'mail as a default delivery and their mailing address is different to the company address, the user can enter the mailing address details in the users profile.				
National Property Bulletin	The National Property Bulletin is a free weekly bulletin that is sent to all users				
Service Updates	Service Updates must be selected to receive emails about system changes.				
Marketing Materials	Marketing Materials must be selected to receive emails about new products etc.				



Complete the steps below to 'Add a User'.

The process time should only take 2 minutes. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action
1	On the banner of the welcome page, click on the Account Administration link. Settlement Room Account Administration
2	Click on Add User under related tasks. Related Tasks Manage Users Add User Add User
3	Enter in the Access Details (All fields are mandatory). Access Details Access Details Access Details Access Details Confirm Password Confirm Password
4	Enter in the Basic Details (All fields are mandatory except alt phone and fax). Basic Details Title / Given Name / Mr/Mrs Surgame Fax Alt Phone E-mail Address Position User Initials
5	Enter in the Ordering Details (All fields are mandatory except default jurisdiction, user initials, alternate addresses). Ordering Details Default Order Jurisdiction VIC V Please Select Default Delivery Method/s Email DX C Specify alternate Regular Mail address (if not selected, uses the Account mailing address) Specify alternate DX address (if not selected, uses the Account DX address)
6	Select from the Communication from SAI Global options (non mandatory). Communications from SAI Global National Property Bulletin Service Updates Marketing Material
7	Click on Save to create a new user.
8	The Account Administrator is returned back to the Manage Account Screen.
	 Global Property recommend that all users have their own unique login details because: It highlights who placed the order; If there is a problem with the order we know who to contact; Certificates are delivered directly to the user by email.



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Once an Account Administrator has added a new user to their account, the user will be able to place orders immediately.



5.2 Manage Users

Manage Users displays a list of all users in an account.

Glossary						
Username	Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).					
Surname	Surname is the user's surname.					
Given Name	Given Name is the user's first name.					
Status – Active	Status – Active enables the user to log into SAI Global Property.					
Status – Locked Out	For certain accounts (based on their security profile), users will be automatically 'Locked Out' if they provide an incorrect password a certain number of times. Users can be unlocked by an SAIG Operator or the Accounts Administrator/s of that account. The default (at this stage) will be to not lock users out.					
Status – Suspended	Status – Suspended allows SAIG Operator or Account Administrator to temporarily deactivate a user's account, to prevent them from logging in. Users can still be edited and re-activated by an SAIG Operators or Accounts Administrators.					
Status - Deleted	Status - Deleted is a permanent and irreversible closure of a users account. The user's details will be viewable, not editable, and the status change cannot be reversed.					
Admin	If the Admin box is ticked then that person is an Account Administrator.					
Reset Password	Reset Password allows the administrator to reset a user's password.					



Notes

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Complete the steps below to view a list of Account Users.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action							
1	On the banner of the welcome page, click on the Account Administration link.							
		Se	ettlement Ro	om A	Acco	ount Administra	ation	
2	The Manage Account Screen will open.							
3	Click on	Manage User	s under relate	ed tasks.			Related Tasl	
							 Manage Manage Add Use 	Groups
4	The follo	wing screen w	ill appear to N	lanager	Use	r Accounts.		
	Accour	nt Users						
	Username	Name	Admin	Status		Actions	User Search	
	addusertest	adduser test		Active	*	Reset Password	Username	
	saigadmin	John Smith		Active	*	Reset Password	Surname	
	saiguser	John Smith		Active	*	Reset Password	Given Name/s	
		Page 1 of 1					User Status 🔲 Active	
						Update	Locked O	Put
						opuate	Inactive	
							Deleted	
							Search	



A list of all users (Active, Locked Out, Inactive and Deleted) will be shown. Use the User Search Tool to filter the user list.



5.3 Change Status

Changes Status allows the Account Administrator to change any users' status within the account. For example: if a user leaves the firm the account administrator can delete the username or if a user is going on leave the account administrator can suspend their username.

Glossary	
Active	Active means the user is able to log into SAI Global Settlement Room.
Locked Out	For certain accounts (based on their security profile), users will be automatically ' locked out ' if they provide an incorrect password a certain number of times. Users can be unlocked by an SAIG Operator or their Accounts Administrator/s.
Suspended	Suspended allows SAIG Operator or Account Administrator to temporarily deactivate a users account, to prevent them from logging in. The users account can still be edited and re-activated by an SAIG Operator or Account Administrators.





Complete the steps below to change a Users Status.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

2 C 3 S at 4 C 5 C 6 A 7 C 8 O	In the banner of the welcome page, click on the Account A Settlement Room Account Administration Iick on Manage Users under related tasks. earch for the User using the User Search Tool, by entering t least one field. • Username; • Surname; • Given Name(s); • User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear. lick on Ok to confirm changes.	g in Message Q 1 us	User Search Username Surname Same/s User Status	Related Tasks
B S at 4 C 5 C 5 A 7 C 3 O	lick on Manage Users under related tasks. earch for the User using the User Search Tool , by entering t least one field. • Username; • Surname; • Given Name(s); • User Status. hange the user's status to Active or Inactive . lick on Update . confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Manage Users Manage Groups Add User Active Locked Out Inactive Deleted Search Reset
3 S at 4 C 5 C 5 A 7 C 3 O	 earch for the User using the User Search Tool, by entering t least one field. Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Manage Users Manage Groups Add User Active Locked Out Inactive Deleted Search Reset
4 C 5 C 6 A 7 C 3 O	 least one field. Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Manage Groups Add User Active Locked Out Inactive Deleted Search Reset
at 4 C 5 C 6 A 7 C 8 O	 least one field. Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Add User
at 4 C 5 C 6 A 7 C 8 O	 least one field. Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Active Locked Out Locked Out Deleted Search Reset
at 4 C 5 C 6 A 7 C 8 O	 least one field. Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Message O 1 us	Username Surname Given Name/s User Status	Active Locked Out Inactive Deleted Search Reset
4 C 5 C 6 A 7 C 8 O	 Username; Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	Surname Given Name/s User Status	Active Locked Out Inactive Deleted Search Reset
5 C 6 A 7 C 8 O	 Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	Given Name/s User Status	Active Locked Out Inactive Deleted Search Reset
5 C 6 A 7 C 8 O	 Surname; Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	Name/s User Status	Active Locked Out Inactive Deleted Search Reset
5 C 6 A 7 C 8 O	 Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	User Status	Active Locked Out Inactive Deleted Search Reset
5 C 6 A 7 C 8 O	 Given Name(s); User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	9	 Locked Out Inactive Deleted Search Seaset
5 C 6 A 7 C 8 O	User Status. hange the user's status to Active or Inactive. lick on Update. confirmation message will appear.	Ø 1 us	3	Deleted Search Reset
5 C 6 A 7 C 8 O	hange the user's status to Active or Inactive . lick on Update . confirmation message will appear.	Ø 1 us	3	Search
5 C 6 A 7 C 8 O	lick on Update .	Ø 1 us	3	Reset
5 C 6 A 7 C 8 O	lick on Update .	Ø 1 us	3	
5 C 6 A 7 C 8 O	lick on Update .	Ø 1 us		
6 A 7 C 8 O	confirmation message will appear.	Ø 1 us		
7 C 8 O		Ø 1 us		
8 O	lick on Ok to confirm changes.			
		11.		
		Ok		
9 C	r;			
	lick on the users Username (written in blue);			Account Users
				Isername Name
			a	ddusertest adduser test
			s	aigadmin John Smith
			s	aiguser John Smith
				Page 1 of 1
10 G	o to the Status drop down			
11 S	elect a Status ;			
		Status	Inactive	~
		ct	Active	
		st	Inactive	
12 C	lick on Update to save changes			
	- -			



A user's status can only be made deleted by an SAIG Property Operator.



5.4 Reset Password

Reset Password allows the Administrator to reset a user's password.

Glossary			
Password	Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.		
	Standard Session Timeout 90 minutes Minimum Password Length 8 characters Maximum Password Length 30 characters Password Expiry 0 days Password Expiry Notification 5 days Password Reuse History 3 days Password Attempts 5 User Lock Out Duration 5 minutes		
Security Setting – Session Time out	Session Time out is the number of minutes of inactivity before system will automatically log you out.		
Security Setting – Minimum Password Length	Minimum Password Length is the minimum amount of characters required for a password.		
Security Setting – Maximum Password Length	Maximum Password Length is the maximum amount of characters allowed for a password.		
Security Setting – Password Expiry	Password Expiry is the number of days before your password must be changed. If password expiry is 0 the password never expires.		
Security Setting – Password Notification Expiry	Password Expiry Notification is the number of days before password expires that the system will notify you. If password expiry is 0 then this redundant.		
Security Setting – Password Reuse History	Password Reuse History is the length of time that the system will remember passwords and disallows reuse.		
Security Setting – Password Attempts	Password Attempts is the number of invalid password attempts before the user is automatically locked out.		
Security Setting – User Lock Out Duration	User Lock Out Duration is the number of minutes that a user is unable to log into the systems following an automatic lockout. A user can contact the account administrator or SAI Global Operator to unlock their account sooner then the duration.		



Notes



Complete the steps below to change a **Users Password**.

The process time should only take 30 seconds. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action				
1	On the banner of the welcome page, click on the Settlement Room Acc	Account Admini	istration	link.	
2	Click on Manage Users under related tasks.			Related Tasks Manage Users Manage Groups Add User	
3	 Search for the User using the User Search Tool, by entering in at least one field. Username; Surname; Given Name(s); User Status. 				
4	Click on a Username (written in blue).			Account Users Username Name addusertest adduser test saigadmin John Smith saiguser John Smith Page 1 of 1	
5	Click on Reset Password under related tasks.			Related Tasks Reset Password Change Username Manage Account	
6	Enter in the New Password.	Reset Password		×	
7	In Confirm Password enter in the New New Password Password again. Confirm Password				
8	Click on Confirm to save changes.			Cancel Confirm	
9	A confirmation message will appear.				
10	Click on Ok to confirm changes.				
Please note: If a user has forgotten their password, the user can type in their username and click on 'Forgotten your Password' on the login page. An email link will be emailed to the user. The user will need to follow the prompts to update their password.					





If more then one user has the same email address an error message will appear and the user will require an SAI Global Operator, Account Administrator or Site Administrator to reset the user's password.



5.5 Update Profile

Update Profile allows the Administrator to update a users profile such as User Details, Ordering Details, and Communication from SAI Global and Other Settings sections.

Glossary			
Username	Usernames can be between 1 and 50 characters, and can basically contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).		
Password	Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.		
	Standard Session Timeout 90 minutes Minimum Password Length 8 characters Maximum Password Length 30 characters Password Expiry 0 days Password Expiry Notification 5 days Password Reuse History 3 days Password Attempts 5 User Lock Out Duration 5 minutes		
Basic Details	Basic Details is the users name and contact details.		
Default Jurisdiction	Default Jurisdiction is the default page for ordering services in the preferred state. For e.g if you choose VIC, when Property Searches menu will automatically open the VIC Menu.		
New Content Notification	 There are 3 options for users to be notified of completed certificates / orders: Don't notify me at all, I'll check the website myself; Notify me only when all content has arrived and the order is complete; Notify me when any new certificate contact arrives for an order. 		
Default Delivery Methods	Delivery Method of Certificates ordered via SAI Global website		
User Initials	User Initials is the user's initials; this can be used for certain billing reports.		
Alternate Address	If a user has a delivery default as mail and their mailing address is different to the company address they can enter these details in the user's profile.		
National Property Bulletin	National Property Bulletin is a free weekly bulletin that is sent to all users		
Service Updates	Service Updates must be selected receive emails about system changes.		
Marketing Materials	Marketing Materials must be selected to receive emails about New Products etc.		



Complete the steps below to update User Profile details.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email eproperty support@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action
1	On the banner of the welcome page, click on the Account Administration link.
	Settlement Room Account Administration
2	Click on Manage Users under related tasks.
3	 Search for the User using the User Search Tool, by entering in at least one field. Username; Surname; Given Name(s); User Status.
4	Click on the required Username (written in blue). Username Name addusertest addusertest saigadmin John Smith saiguser John Smith Page 1 of 1 Page 1 of 1
5	Update any details in the User Details section.
6	Update any details in the Ordering Details section.
7	Update any details in the Communications from SAI Global section. Communications from SAI Global National Property Bulletin Service Updates Marketing Material
8	Click on Update to save changes.
9	A confirmation message will appear.
10	Click on Ok to confirm changes.
To fi	rom changes are automatically saved under the notes sections.



5.6 Change Username

Change Username allows the Account Administrator to change a user's username.

Glossary	
Username	Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).

Notes



Complete the steps below to change a Users Username.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action			
1	On the banner of the welcome page, click on t	the Account Adminis	stration li	nk.
	Settlement Room Account Administration			
2	Click on Manage Users under related tasks.			Related Tasks
				 Manage Users Manage Groups Add User
3	Search for the User using the User Search T	ool, by entering in	User Search	
	at least one field.		Username	
			Surname Given	
	Username;		Name/s User Status	Active
	 Surname; Given Name(s); 			Locked Out
				Inactive Deleted
	User Status.			Search
				Reset
4	Click on the required Username (written in blue	<i>.</i> le).	Use	ccount Users ername Name dusertest adduser test gadmin John Smith
5	Click on Change Username under the related	l taska	sai	guser John Smith Page 1 of 1
5	Click on Change Osemane under the related	1 (355).	8	Iated Tasks Reset Password Change Username Manage Account
6	Enter in the New Username .	Change Username		×
7	Confirm the New Username .	New Usernar	ne	
7	Commune New Osername.	Confirm Usernar	ne	
8	Click on Confirm to save changes.		Can	cel Confirm
9	A confirmation message will appear.			
10	Click on Ok to confirm changes.			
Us	sernames are unique.			



Usernames can be between 1- 50 characters, and can contain any text / keyboard character, including spaces. Usernames cannot include keys that are not on the keyboard (e.g. ä).



5.7 Manage Groups

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

5.7.1 Add Group Name

Glossary				
Teams	 Team is the same as Default (groups) but a Team Leader can be assigned to a team. A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e. Group Type named Team; Group named Sales; Team Leader Selected as John Smith; Users under John are Terry and Harry etc. John will then have access to manage the users, but he cannot add or remove users from the team unless he is an Account Administrator. 			
Departments	Department is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.			
Name	Name is the group name.			
Туре	There are two options	s for Type:		
	Department	Department comes from a requirement for specific accounts to see a department code on their invoices.		
	Team	Team allows a team leader to be assigned to a group.		



Notes



Complete the steps below to 'Add a Group Name'.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email eproperty support@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action		
1	On the banner of the welcome page, click on the Account Administration link. Settlement Room Account Administration		
2	Click on Manage Groups under related tasks.	Related Tasks Manage Users Manage Groups Add User	
3	Click on Add Group under related tasks.	Related Tasks Manage Account Add Group	
4	The Following Box will appear to Add a Group.		
5	Type in a Group Name.	Create Group X	
6	 Select one of the following options under type: Department (Departments Box Selected in Manage Accounts); Team (Teams Box Selected in Manage Accounts). 	Name Type Cancel OK	
7	Click on Ok to add a New Group Name.		
8	A confirmation message will appear.	Message X Group admin has been successfully created	
9	Click on Ok to confirm New Group Name.	Created //	



A Group Type is required prior to adding Group Names. Access for Administrators requires special permissions.



5.7.2 Edit Group Name

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

Team is the same as Default (groups) but a Team Leader can be assigned to a team.		
A Team Leader is allo that teams profile i.e.	ocated to a group name in teams and are able to manage	
Group Type named Team;		
Group named Sales;		
Team Leade	er Selected as John Smith;	
 Users under 	r John are Terry and Harry etc.	
John will then have a	ccess to manage the users, but he cannot add or remove	
users from the team	unless he is an Account Administrator.	
Department is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.		
Name is the group name.		
There are two options	s for Type:	
Department	Department comes from a requirement for	
	specific accounts to see a department code on their invoices.	
Team	Team allows a team leader to be assigned to a group.	
	team. A Team Leader is alle that teams profile i.e. Group Type Group name Team Leade Users under John will then have a users from the team Department is used Group Name which w Name is the group na There are two options Department	



Notes



Complete the steps below to Edit Group Name.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email eproperty support@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Action			
On the banner of the welcome page, click on the Account Administration link. Settlement Room Account Administration			
Click on Manage Groups under related tasks.			
Click on Edit to change a Group Name.			
Groups Group Name Group Type Actions Admin Team Ø Edit @ Delete ① Members heipdesk Default Ø Edit @ Delete ① Members sales Department Ø Edit @ Delete ① Members	Group Search Group Name Group Type		
Type in a New Group Name.	Edit Group Group Details Group Name Uppate Cancel		
Click on Update to edit the Group Name.			
If the Group Type is Team , the user can update the Team Leader.	Group Details Group Name Team Leader Update Cancel Harry Smith (denysmith) John Smith (denysmith) Terry Smith (denysmith)		
A confirmation message will appear.			
Click on Ok to confirm changes.			
	On the banner of the welcome page, click on the Account Settlement Room Account Administration Click on Manage Groups under related tasks. Click on Edit to change a Group Name. Groups Oroup Name Oroup Name Oroup Name Type in a New Group Name. Click on Update to edit the Group Name. If the Group Type is Team, the user can update the Team Leader.		



If the group type is Team the user can select the team leader in this section, however the team leader cannot be a member of the group.



5.7.3 Edit Members within a Group (Add Members)

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

Glossary			
Teams	Team is the same as Default (groups) but a Team Leader can be assigned to a team.		
	A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.		
	Group Type named Team;		
	Group named Sales;		
	Team Leader Selected as John Smith;		
	Users under	r John are Terry and Harry etc.	
	John will then have access to manage the users, but he		
	users from the team	unless he is an Account Administrator.	
Departments	Department is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.		
News	-		
Name	Name is the group name.		
Туре	There are two options for Type:		
	Department	Department comes from a requirement for	
		specific accounts to see a department code on their invoices.	
	Team	Team allows a team leader to be assigned to a	
		group.	



Notes



Complete the steps below to Add Members to a group.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email eproperty support@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action		
1	On the banner of the welcome page, click on the Account Administration link. Settlement Room Account Administration		
2	Click on Manage Groups under related tasks.		
3	Click on Members for the group name being updated.		
	Group Name Group Type Actions Group Search Admin Team @ Edit @ Delete () Members Group Search helpdesk Default @ Edit @ Delete () Members Group Name sales Department @ Edit @ Delete () Members Group Type		
4	A list of all active users will be in the Non Members Box, unless they are already a member of this group.		
5	Click on User(s) in Non Members Box.		
6	Click on Add to add members to the group.		
7	Once finished adding users click on Update to save changes.		
8	A confirmation message will appear.		
9	Click on OK to confirm changes.		
10	To move to another page use the options under the Related Tasks Menu.		
that that	Non Members list will only show a list of users who are not a member in any groups within group type. It more then one user at time by holding down the ctrl button while selecting the user is.		



Users can belong to multiple groups; however a user can only belong to one group within a group type A Group Type is required prior to adding Group Names.



5.7.4 Edit Members within a Group (Remove Members)

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

Glossary			
Teams	Team is the same as Default (groups) but a Team Leader can be assigned to a team.		
	A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.		
	Group Type named Team;		
	Group named Sales;		
	Team Leader Selected as John Smith;		
	Users under	r John are Terry and Harry etc.	
	John will then have access to manage the users, but he		
	users from the team	unless he is an Account Administrator.	
Departments	Department is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.		
News	-		
Name	Name is the group name.		
Туре	There are two options for Type:		
	Department	Department comes from a requirement for	
		specific accounts to see a department code on their invoices.	
	Team	Team allows a team leader to be assigned to a	
		group.	



Notes



Complete the steps below to **Remove Members**.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email epropertysupport@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action			
1	On the banner of the welcome page, click on the Account Administration link.			
	Settlement Room Account Administration			
2	Click on Manage Groups under related tasks.	Related Tasks (i) Manage Users (i) Manage Group: (i) Add User		
3	Click on Members for the group name being updated.			
	Groups			
	Group Name Group Type Actions Admin Team @ Edit 🕄 Delete 🕥 Members	Group Search		
	helpdesk Default Selete C Members	Group Name		
	sales Department 🚱 Edit 🔇 Delete 🚯 Members	Group Type		
5 6 7	John Smith (johnsmith) Remove >> Remove >> Click on User(s) in the Current Members Box. Click on Remove to remove members. Once you have finished removing user(s) click on Update	ate to save changes.		
8	A confirmation message will appear.			
9	Click on Ok to confirm changes.			
10	To move to another page use the options under the Re	lated Tasks Menu.		
<u>о</u> т	The Non Members list will only show a list of users who are no	ot a member in any groups within		
	hat group type.			



Users can belong to multiple groups; however a user can only belong to one group within a group type.



5.7.5 Remove Group

Manage Groups allows administrators to create and manage groups within an account. This can be used for billing reports. Account Administrators will be able to add a group type, edit group name, edit members and remove groups. A box will need to be ticked in the Account Management Screen for account administrators to have this access.

Team is the same as Default (groups) but a Team Leader can be assigned to a team.			
A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.			
Group Type named Team;			
Group named Sales;			
Team Leade	Team Leader Selected as John Smith;		
Users under John are Terry and Harry etc.			
	ccess to manage the users, but he cannot add or remove		
users from the team	users from the team unless he is an Account Administrator.		
Department is used for invoicing only. Department codes are used as the Group Name which will be shown on the invoices.			
Name is the group name.			
There are two options for Type:			
Department	Department comes from a requirement for		
	specific accounts to see a department code on their invoices.		
Team	Team allows a team leader to be assigned to a group.		
	team. A Team Leader is all that teams profile i.e. Group Type Group name Team Leade Users under John will then have a users from the team Department is used Group Name which v Name is the group na There are two options Department		



Notes



Complete the steps below to 'Remove a Group'.

The process time should only take 1 minute. If the user requires additional help please contact the SAI Global helpdesk on 1300 730 000 or email eproperty support@saiglobal.com Monday to Friday 8:00am to 7:00pm EST.

Step	Action				
1	On the banner of the w	elcome page, click on the Acco	ount Administratio	n	
	Settlement Room Account Administration				
2	Click on Manage Grou	ps under related tasks.		Related Tasks	
				 Manage Users Manage Group Add User 	
3	Click on Members for t	he group name you are updatir	ng.		
	Groups				
	Group Name	Group Type Actions	Group Search		
	Admin helpdesk	Team Selit Content Con	Group Name		
	sales	Department 🔞 Edit 😵 Delete 🚯 Members	Group Type		
4	Remove All Current Members by clicking on the user(s) you wish to remove.				
5	Click on Update to save changes.				
6	A confirmation message will appear.				
7	Click on Ok to confirm changes.				
8	Click on Manage Grou	ps under related tasks.			
9	Click on Delete beside the group you wish to delete.				
	Groups				
	Group Name	Group Type Actions	Group Search		
	Admin	Team 🛞 Edit 😢 Delete 🚯 Members	Group Name		
	helpdesk sales	Default S Edit Delete (Members Department S Edit Delete (Members	Group Type	~	
10	A confirmation message	A confirmation message will appear.			
11	Click on Ok to confirm changes.				
Tr	e Non Members list will only	<i>r</i> show a list of users who are n	ot a member in any	groups within	
th th	at group type.				
	elect more then one user at t mes.	ime by holding down the ctrl bu	utton while selecting	the user	



All users must be removed from a group before a group can be deleted.

