

# Settlement Room User and Account Maintenance



### Intentionally Left Blank



# Contents

1	. Features and Brief Descriptions of Settlement Room	4	
2	2. Login		
	2.1 Forgotten Password	7	
3	. Settlement Room Behaviours	9	
4	User Account Maintenance	.10	
	4.1 User Account Maintenance - Change Password	10	
	4.2 User Account Maintenance – Update my Profile	12	
	4.3 User Account Maintenance – Change Username	.14	
	4.4 User Account Maintenance – Switch Accounts	16	
5	. Account Administrator Maintenance	.18	
	5.1 Add User	20	
	5.2 Manage Users	23	
	5.3 Change Status	25	
	5.4 Reset Password	27	
	5.5 Update Profile	30	
	5.6 Change Username	.32	
	5.7 Manage Groups	.34	
	5.7.1 Add Group Name	34	
	5.7.2 Edit Group Name	36	
	5.7.3 Edit Members within a Group (Add Members)	38	
	5.7.4 Edit Members within a Group (Remove Members)	40	
	5.7.5 Remove Group	42	



# **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	<b>Results &amp; Billing</b> 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	<b>Usernames</b> 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 <b>password</b> between 8 and 30 characters.
Security Settings	SAI Global Properties <b>Standard Security Settings</b> 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/CSMLog SAIG Property Indee  SAIG Property Indee  SAIG Property Indee  SAIG Property Information  me 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  Ty Encompass <sup>11</sup> 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 them and decision making with complex matters while conducting instant document searches, by Encompass now.  Encompass <sup>11</sup> – revolutionary software technology unique to SAI Global Property and available only through Search Managi morives the accuracy and speed of your decision-making by visually mapping the complex relationships and connectors between corporate entites, directors, insterNeed actions and search.  The intuitive technology provides instant access to multiple property, business and personal searches while simultaneous providing invaluable analysis of ASC, ITSA, Land Tite and soon PSR data.  Trial Encompass INW to save maximum time for minimal costs by clicking on the Encompass New' button in your Search	contact
2	Please cal our Helodesk on 1300 730 000 or email us at eproperty support @sakolobal.com if you require any assistance. On the right hand side of the page enter in <b>Your Usernam</b>	ne.
3	Enter in your <b>Password.</b>	
4 Please note: I in their userna page. An ema follow the pro	Click on <b>Submit</b> . vord Requirements are 8 – 30 Characters. f a user has forgotten their password, the user can type ame and click on 'Forgotten your Password' on the login hil link will be emailed to the user. The user will need to mpts to update their password.	Sign in Username Password Submit 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 <b>password</b> between 8 and 30 characters.
Security Setting	SAI Global Properties <b>Standard Security Settings</b> 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.



Notes

# ..... ..... ..... ..... ..... ..... ..... ..... ..... ..... ..... ..... ..... ..... .....



#### 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 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 that e-mail to complete your password reset.  Should you not receive the e-mail this feature may be unavailable for your account. Please contact our Helpdesk on 1300 730 000 for assistance.
6	Follow the <b>Prompts</b> from the reset password email.
Password requirements are between 8-30 Characters.	



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		
Home	When the user clicks on <b>Home</b> it will take homepage. The user will be able to view F	the user to SAI Global's Settlement Room Recent Matters and the Latest News.
Account Administration	tion Account Administration link can only be seen by an Account Administrators. Th link is found at the top of the homepage. When the Account Administrator clicks o the link the user will have access to updating the Companies Account and User Details.	
	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 Oetails	<ul> <li>When the user hovers over and selects Change My Details, the user will be able to update their own details.</li> <li>User Details (Username, Full Name, Contact Details, Position);</li> <li>Ordering Details;</li> <li>Communication from SAI Global.</li> </ul>	
Switch Accounts	<b>Switch Accounts</b> 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	<b>Contact</b> 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.	
Logout	Logout enables the user to logout of Settl	ement 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 <b>password</b> between 8 and 30 characters. <b>Standard</b> <b>Session Timeout</b> 90 minutes <b>Minimum Password Length</b> 8 characters <b>Maximum Password Length</b> 30 characters <b>Password Expiry</b> 0 days <b>Password Expiry</b> 0 days <b>Password Reuse History</b> 3 days <b>Password Attempts</b> 5 <b>User Lock Out Duration</b> 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	<b>Maximum Password Length</b> is the maximum amount of characters allowed for a password.	
Security Setting – Password Expiry	<b>Password Expiry</b> 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	<b>Password Expiry Notification</b> 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	<b>Password Reuse History</b> is the length of time that the system will remember passwords and disallows reuse.	
Security Setting – Password Attempts	<b>Password Attempts</b> is the number of invalid password attempts before the user is automatically locked out.	
Security Setting – User Lock Out Duration	<b>User Lock Out Duration</b> 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.

follow the prompts to update their 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 <b>Your Name</b> ne display user functions.	ext to Contact   Help   Logout to Welcome John Smith Contact   Help   Logout Change Password Change My Details
2	Click on Change Password.	
3	Enter in your Current Password.	
4	Enter in a <b>New Password.</b>	Change Your Password
5	In the Confirm New Password Field, enter in the <b>New Password</b> again.	New Password
6	Click on <b>Save</b> to save changes.	Save
7	A confirmation message will appear.	
8	Click on <b>Ok</b> to confirm changes.	
Password Requirements are 8 – 30 Characters.		
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 promote to undate 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	<b>Usernames</b> 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 <b>password</b> 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	<b>Default Jurisdiction</b> 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	<ul> <li>There are 3 options for users to be notified of completed certificates / orders:</li> <li>Don't notify me at all, I'll check the website myself;</li> <li>Notify me only when all content has arrived and the order is complete;</li> <li>Notify me when any new certificate contact arrives for an order.</li> </ul>	
Default Delivery Methods	<b>Delivery Method</b> 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 <b>mailing address</b> 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	
4	On the honner of the page, haver every your Name payt to Contact   Holp     agout to	
1	display Liser Eulerions	
	Welcome John Smith 2 Contact   Help   Logout	
	Change Password	
	Change My Details	
2	Click on Change my Details.	
3	Enter Data or Change the Data in the User Details fields.	
	I laer Details	
	Username saiguser Status Active	
	Title / Given Name / Surname Mr John Smith	
	E-mail Address epropertyinfo@saiglobal.com Position Administrator	
4	Select or check any selections in the <b>Ordering Details</b> section.	
	Ordering Details	
	Default Order Jurisdiction VIC User Initials	
	Default Delivery Method/s Email 🗹 Mail	
	DX 🔲	
	Specify alternate Regular Mall address (if not selected, uses the Account mailing address)	
	Specify alternate DX address (If not selected, uses the Account DX address)	
5	Select or check any selections in the <b>Communications</b>	
	from SAI Global section.	
	Service Updates 🕞	
	Marketing Material 🕑	
6	Click on <b>Update</b> to save changes.	
7	A confirmation message will appear.	
8	Click on <b>Ok</b> to confirm changes.	
Related Tasks can be found on the right hand side of the page which gives the user additional links to manage their profile.		



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	<b>Usernames</b> 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 your N display User Functions	Vame next to Contact   Help   Logout to
2	Click on Change my Details.	
3	Click on Change Username under the relate	d tasks.  Related Tasks  Related Tas
4	Enter in the <b>New Username</b> .	Change Username X
5	Confirm the <b>New Username.</b>	Confirm Username
6	Click on <b>Confirm</b> to save changes.	Cancel Confirm
7	A confirmation message will appear.	
8	Click on <b>Ok</b> to confirm changes.	
User	name 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 Contact   Help   Log Welcome John Smith Change Pass Change My D	Contact   Help   Logout to					
2	Click on Switch Account.							
3	Select the <b>Account</b> you would like to switch to. Click on <b>Switch</b> to switch accounts.	Switch Account Please select the account you want to switch to SAI Global Property Division [espreon] Switch	×					
5	The user has now switched accounts.							
The user will know what account they are in as the account code will appear next to the users name on the banner of the homepage.								



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



# 5. Account Administrator Maintenance

Glossary	
Company Name	<b>Company Name</b> is the legal name of a firm.
ABN / ACN Number	<ul> <li>ABN = Australian Business Number – relates to GST.</li> <li>ACN = Australian Company Number – the companies identification number.</li> </ul>
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	<b>Industry</b> 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 <b>Physical Address</b> is 224-226 Normanby Road Southbank VIC 3006.
Postal Address	Example of a <b>Postal Address</b> PO Box, GPO Box, Locked Bag.
DX Address	Example of a <b>DX Address</b> DX 332 Melbourne.
Account Contacts - Primary and Billing	Examples of <b>Primary Contacts</b> - Directors, Managers, Team Leaders. Examples of <b>Billing Contacts</b> – Accounts / Finance Contact.
Specify Billing Address	<b>Specify Billing Address</b> allows a client to provide an alternate address for receipt of statements.
Invoice Delivery Method	Email, Mail, DX.
Default Order Jurisdiction	<b>Default Jurisdiction</b> 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	<b>Default Delivery Methods</b> 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	<b>Manager User Accounts</b> 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 <b>Account Administration</b> link.           Settlement Room         Account Administration
2	Update details in the <b>Company Information</b> section.
	Company Information         SAIG [SAIG]         Company Name         SAIG [SAIG]         Company Name         ABN/ACN         O 000 000 000         ABN/ACN         ABN/ACN         O 000 000         ACcount Code         PCL12696         To change your Company Particulars (Name/Business Number) please email us.         Company Contact         Phone         1300 730 000         Fax       (03) 9645 2519         Industry Other         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 <b>Update</b> to save changes.
8	A confirmation message will appear.
9	Click on <b>Ok</b> 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	<b>Usernames</b> 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 <b>password</b> 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	<b>Default Jurisdiction</b> 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 <b>notified</b> of completed certificates / orders via SAI Global website:						
	<ul> <li>Don't notify the at all, in check the website myself;</li> <li>Notify me only when all content has arrived and the order is complete;</li> </ul>						
	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 <b>mailing address</b> 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 <b>Account Administration</b> link.           Settlement Room         Account Administration
2	Click on Add User under related tasks.  Related Tasks  Manage Users  Add User  Add User  Add User
3	Enter in the Access Details (All fields are mandatory).  Access Details  Access Details  Access Details  Access Details  Access Details  Confirm Password  Confirm Password  Confirm Password  Access Details
4	Enter in the Basic Details (All fields are mandatory except alt phone and fax).  Basic Details  Title / Given Name / Mr/Mrs Given Name/s Sumame 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 VIC Ve New Content Notification Please Select Default Delivery Method/s Email Mail DX 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.
SAI O	<ul> <li>Global Property recommend that all users have their own unique login details because:</li> <li>It highlights who placed the order;</li> <li>If there is a problem with the order we know who to contact;</li> <li>Certificates are delivered directly to the user by email.</li> </ul>



$\wedge$	
<u> </u>	

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	<b>Usernames</b> 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 <b>'Locked Out</b> ' 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	<b>Status – Suspended</b> 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	<b>Status - Deleted</b> 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 <b>Admin</b> box is ticked then that person is an Account Administrator.
Reset Password	<b>Reset Password</b> allows the administrator to reset a user's password.



Notes

 	 •••••	 	 	 	 	 	



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.				
	Settlement Room Account Administration				
2	The Manage Account Screen will open.				
3	Click on Manage Users under related tasks.  Click on Manage Users  Manage Users  Add User				
4	The following screen will appear to Manager User Accounts.				
	Account Users				
	Username Name	Admin	Status	Actions	liser Search
	addusertest adduser test		Active 👻	Reset Password	Username
	saigadmin John Smith		Active	Reset Password	Surname
	saiguser John Smith		Active	S Reset Password	Given Name/s
	Page 1 of 1				User Status Active
				Update	Locked Out
					Inactive
					Deleted
					Search
					© Reset
Option availab	w user details click on th le on this page to add or <i>r</i> ord.	e user's usern remove an ac	name <i>(written</i> ccount admin	n in blue). istrator, change	a user's status or reset



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 ' <b>locked out</b> ' 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	<b>Suspended</b> 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.

Step	Action		
1	On the banner of the welcome page, click on the Account Admin Settlement Room Account Administration	nistratior	ı link.
2	Click on Manage Users under related tasks.		Related Tasks C Manage Users C Manage Groups Add User
3	<ul> <li>Search for the User using the User Search Tool, by entering in at least one field.</li> <li>Username;</li> <li>Surname;</li> <li>Given Name(s);</li> <li>User Status.</li> </ul>	User Search Usernam Surnam Give Name User Statu	
4	Change the user's status to <b>Active or Inactive</b> .		
5	Click on Update.		
6 7	A confirmation message will appear.	age user(s) have be	en updated successfully
8	Or;		
9	Click on the users <b>Username</b> (written in blue);		Account Users Username Name addusertest adduser test salgadmin John Smith salguser John Smith Page 1 of 1
10	Go to the <b>Status</b> drop down		
11	Select a Status;	Active	
12	Click on Update to save changes		
Access	s to rest password & change username can be found under related	tasks in t	he user's profile.



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 <b>password</b> between 8 and 30 characters. <b>Standard</b> <b>Session Timeout</b> 90 minutes <b>Minimum Password Length</b> 8 characters <b>Maximum Password Length</b> 30 characters <b>Password Expiry</b> 0 days <b>Password Expiry</b> 0 days <b>Password Expiry Notification</b> 5 days <b>Password Reuse History</b> 3 days <b>Password Attempts</b> 5 <b>User Lock Out Duration</b> 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	<b>Minimum Password Length</b> 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	<b>Password Expiry</b> 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	<b>Password Expiry Notification</b> 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	<b>Password Reuse History</b> is the length of time that the system will remember passwords and disallows reuse.		
Security Setting – Password Attempts	<b>Password Attempts</b> is the number of invalid password attempts before the user is automatically locked out.		
Security Setting – User Lock Out Duration	<b>User Lock Out Duration</b> 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 A	e Account Ad	Iministration	n link.
2	Click on Manage Users under related tasks.			Related Tasks D Manage Users D 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 <b>Username</b> (written in blue).			Account Users           Username         Name           addusertest         adduser test           saigadmin         John Smith           saiguser         John Smith           Page 1 of 1         Page 1 of 1
5	Click on <b>Reset Password</b> under related tasks.			Related Tasks © <u>Reset Password</u> © Change Username © Manage Account
6	Enter in the New Password.			
7	In Confirm Password enter in the New Password I Confirm Password again.			
8	Click on <b>Confirm</b> to save changes.			Cancel Confirm
9	A confirmation message will appear.			
10 Click on <b>Ok</b> 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.				bmit otten your 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	<b>Usernames</b> 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	<ul> <li>Depends on the accounts security profile. The default profile that applies to almost everyone requires a password between 8 and 30 characters.</li> <li>Standard</li> </ul>	
	Session Timeout 90 minutes Minimum Password Length 8 characters Maximum Password Length 30 characters Password Expiry 0 days	
	Password Expiry O 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	<b>Default Jurisdiction</b> 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	<ul> <li>There are 3 options for users to be <b>notified of completed</b> certificates / orders:</li> <li>Don't notify me at all, I'll check the website myself;</li> <li>Notify me only when all content has arrived and the order is complete;</li> <li>Notify me when any new certificate contact arrives for an order.</li> </ul>	
Default Delivery Methods	Delivery Method of Certificates ordered via SAI Global website	
User Initials	<b>User Initials</b> 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 <b>mailing address</b> 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 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 Users under related tasks.	
3	Search for the User using the User Search Tool, by entering in	
	at least one field.	
	Surname	
	Username;	
	Surname;     Lock	e ed Out
	• Given Name(s);	ve
	User Status.	ed
	Search Search	1
4	Click on the required Username (written in blue).	nt Users
	Username	Name
	addusertest	adduser test
	saigadmin	John Smith
	saiguser	John Smith
5	Update any details in the User Details section.	Tage Tort
•		
	User Details	
	Title / Given Name / Mr Harry Smith	
	Suppone 1300 730 000 Fax (03) 9645 2519 Alt Phone	
	E-mail Address harrysmith@saiglobal.com	
	Position Conveyancer User Initials	
6	Update any details in the <b>Ordering Details</b> section.	
	Ordering Details	
	New Content Notification Don't notify me at all fill check the web site mycelf	
	Default Delivery Method/s Email	
	DX 🔲	
	Specify alternate Regular Mail address (if not selected, uses the Account mailing address)	
	<ul> <li>Specify alternate DX address (if not selected, uses the Account DX address)</li> </ul>	
7	Update any details in the Communications from SAI Global	
	section.	
	Service	
	Marketing I	laterial
8	Click on <b>Update</b> to save changes.	
9	A confirmation message will appear.	
10	Click on <b>Ok</b> to confirm changes.	
To fr	from 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	<b>Usernames</b> 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 the Account Admin	istratio	<b>n</b> link.
	Settlement Room Account Administration		
2	Click on Manage Users under related tasks.		Related Tasks C Manage Users C Manage Groups Add User
3	Search for the User using the User Search Tool, by entering in	User Ser	arch
	at least one field.	User	name
		Sur	name
	• Username;	N	Given ame/s
	• Surname;	User :	Status Active
	Given Name(s);		Inactive
	User Status.		Deleted
			Search Reset
4	Click on the required Username (written in blue).		Account Users
			Username Name
			addusertest adduser test
			saigadmin John Smith
			Page 1 of 1
5	Click on Change Username under the related tasks.		Related Tasks
			Reset Password
			Change Username
			Manage Account
6	Enter in the New Username. Change Username		×
7	New Userna	ame	
1	Confirm Userna	ame	
8	Click on <b>Confirm</b> to save changes.		Cancel Confirm
9	A confirmation message will appear.		
10	Click on <b>Ok</b> to confirm changes.		
Usernames 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	<ul> <li>Team is the same as Default (groups) but a Team Leader can be assigned to a team.</li> <li>A Team Leader is allocated to a group name in teams and are able to manage that teams profile i.e.</li> <li>Group Type named Team;</li> <li>Group named Sales;</li> <li>Team Leader Selected as John Smith;</li> <li>Users under John are Terry and Harry etc.</li> <li>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.</li> </ul>		
Departments	<b>Department</b> 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 for <b>Type:</b>		
	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 Adminis Settlement Room Account Administration	stration link.
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.	oup X
6	<ul> <li>Select one of the following options under type:</li> <li>Department (Departments Box Selected in Manage Accounts);</li> <li>Team (Teams Box Selected in Manage Accounts).</li> </ul>	Name Type Cancel OK
7	Click on <b>Ok</b> to add a New Group Name.	
8	A confirmation message will appear.	X min has been successfully
9	Click on <b>Ok</b> to confirm New Group Name.	Ok
Access to Group Functions is only enabled for account administrators to see if the group settings box is selected by an internal operator in the Account Management Screen.		



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.

Glossary			
Teams	<b>Team</b> 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 Sal	es;	
	Team Leader Sel	ected 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	s he is an Account Administrator.	
Departments	<b>Department</b> 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 for <b>Type:</b>		
	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 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.

Step	Action	
1	On the banner of the welcome page, click on the Account Administration	istration link.
2	Click on Manage Groups under related tasks.	Related Tasks C Manage Users C Manage Groups Add User
3	Click on Edit to change a Group Name.	
	Group Name       Group Type       Actions         Admin       Team       © Edit © Delete (1) Members         helpdesk:       Default       © Edit © Delete (2) Members         sales       Department       © Edit © Delete (2) Members	Group Search Group Name Group Type
4	Type in a <b>New Group Name.</b>	Edit Group Group Isenis Group Isans Stare Uppats Cancel
5	Click on <b>Update</b> to edit the Group Name.	
6	If the <b>Group Type</b> is <b>Team</b> , the user can update the Group be Team Leader.	alls Group Name team Team Leader Harry Smith (harrysmith) John Smith (ichnsmith) Terry Smith (terrysmith)
7	A confirmation message will appear.	
8	Click on <b>Ok</b> to confirm changes.	
Acces box is	s to Group Functions is only enabled for account administrators to s selected by an internal operator in the Account Management Screer	ee if the group settings n.



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	<b>Team</b> is the same as Default (groups) but a Team Leader can be assigned to 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 unles	s 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 for <b>Type:</b>		
	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.	
	<ul> <li>Manage Users</li> <li>Manage Groups</li> <li>Add User</li> </ul>	
3	Click on <b>Members</b> for the group name being updated.	
	Groups	
	Group Name Group Type Actions Group Search	
	Admin Team @ Eatl @ Delete @ Members Group Name	
	nepoesk Detault @ cot @ Deteits @ Members Group Type V	
	member of this group.          Members         Current Members         John Smith (johnsmith)         Remove >>         << Add	
5	Click on User(s) in Non Members Box.	
6	Click on <b>Add</b> to add members to the group.	
7	Once finished adding users click on <b>Update</b> to save changes.	
8	A confirmation message will appear.	
9	Click on <b>OK</b> to confirm changes.	
10	To move to another page use the options under the <b>Related Tasks Menu.</b>	
<ul> <li>The Non Members list will only show a list of users who are not a member in any groups within that group type.</li> <li>Select more then one user at time by holding down the ctrl button while selecting the user names.</li> </ul>		



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	<b>Team</b> 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 Sal	les;	
	Team Leader Sel	ected as John Smith;	
	Users under John	are Terry and Harry etc.	
	John will then have access users from the team unless	s to manage the users, but he cannot add or remove s he is an Account Administrator.	
Denertmente	Department is used for in	religing only. Department and as are used as the	
Departments	Group Name which will be shown on the invoices.		
Name	Name is the group name.		
Туре	There are two options for <b>Type:</b>		
	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           Settlement Room         Account Administration	link.
2	Click on Manage Groups under related tasks.	Related Tasks
3	Click on <b>Members</b> for the group name being updated.	
	Groups	
	Group Name Group Type Actions Group Search	
	Admin Team Set Delete () Members Group Name Bet Control Contro	
	sales Department 🞯 Edit 🖏 Delete 🚯 Members Group Type	×
4	A list of all active users will be in the Non Members Box, unless they are alr	eady a
	member of this group.	-
	Members	
	Current Members Non Members	
	John Smith (johnsmith) Terry Smith (terrysmith)	
	Remove >>	
	<< Add	
5	Click on User(s) in the Current Members Box.	
6	Click on <b>Remove</b> to remove members.	
7	Once you have finished removing user(s) click on <b>Update</b> to save changes.	
8	A confirmation message will appear.	
9	Click on <b>Ok</b> to confirm changes.	
10	To move to another page use the options under the <b>Related Tasks Menu.</b>	
The Non Members list will only show a list of users who are not a member in any groups within that group type.		
Select more then one user at time by holding down the ctrl button while selecting the user names.		



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.

Glossary			
Teams	<b>Team</b> 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 Sal	les;	
	Team Leader Sel	ected 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	s he is an Account Administrator.	
Departments	<b>Department</b> 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 for <b>Type:</b>		
	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 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 <b>Account Administration</b>	
2	Click on Manage Groups under related tasks.  Related Tasks  Manage Users  Manage Groups  Add User	
3	Click on <b>Members</b> for the group name you are updating.	
	Group Name       Group Type       Actions       Group Search         Admin       Team       @ Ect @ Delete @ Members       Group Search         helpdesk       Delault       @ Ect @ Delete @ Members       Group Name         sales       Department       @ Ect @ Delete @ Members       Group Type	
4	Remove All Current Members by clicking on the user(s) you wish to remove.	
5	Click on <b>Update</b> to save changes.	
6	A confirmation message will appear.	
7	Click on <b>Ok</b> to confirm changes.	
8	Click on Manage Groups under related tasks.	
9	Click on <b>Delete</b> beside the group you wish to delete.	
	Group Name       Group Type       Actions       Group Search         Admin       Team       © Edit © Delete © Members       Group Name         helpoesix       Default       © Edit © Delete © Members       Group Name         sales       Department       © Edit © Delete © Members       Group Name	
10	A confirmation message will appear.	
11	Click on <b>Ok</b> to confirm changes.	
The Non Members list will only show a list of users who are not a member in any groups within that group type.		
Selection	t more then one user at time by holding down the ctrl button while selecting the user s.	



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

