Introduction

This Sub-User Guide is intended to describe the following SMART features:
Managing User Profiles as an Administrative User (Search/Edit>Brokers>Security)

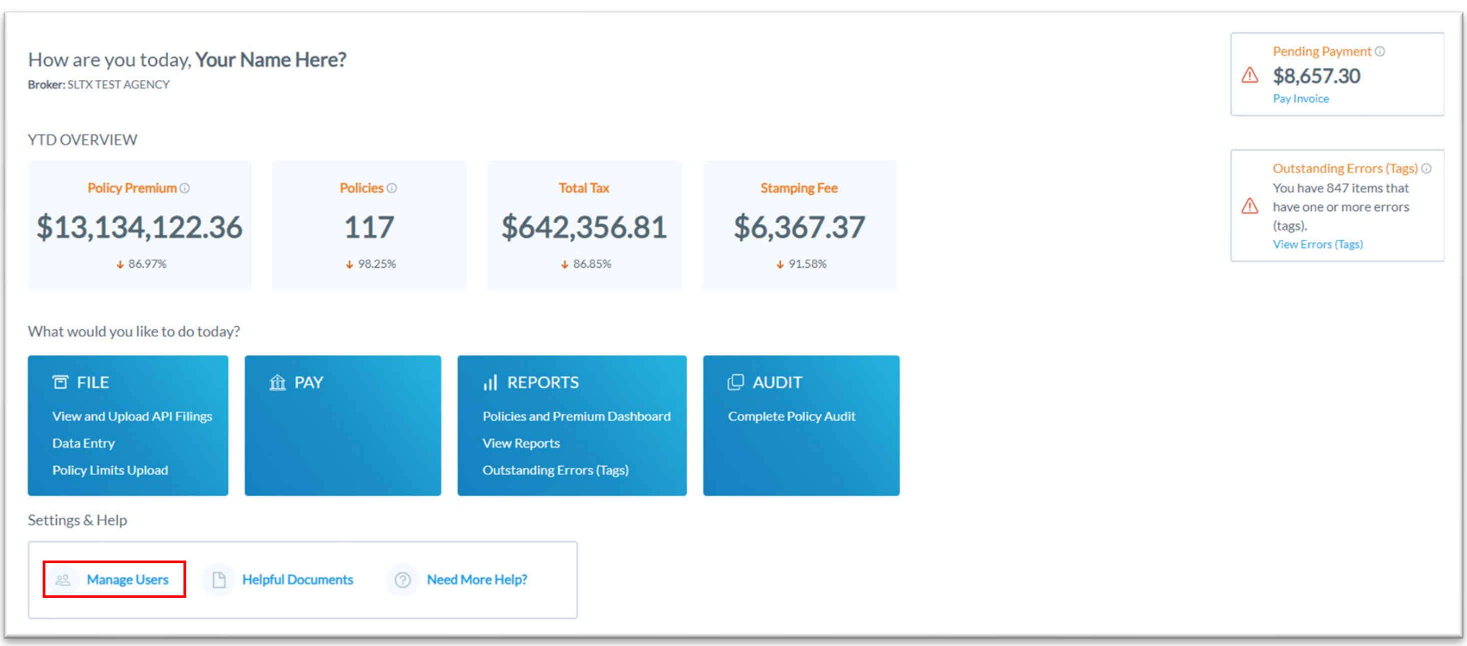
NOTE: This information is also included as part of the entire and comprehensive User Guide: Broker Search

Prerequisites
Prior to accessing SMART and/or utilizing the API, you are required to accept any licensing agreements: Privacy Policy, Terms of Use, and SMART Connector and/or API User Licensing Agreement (when applicable).

Environments
The following URLS are used for SMART:
Test: https://test.sltx.org/ **Production:** https://smart.sltx.org/

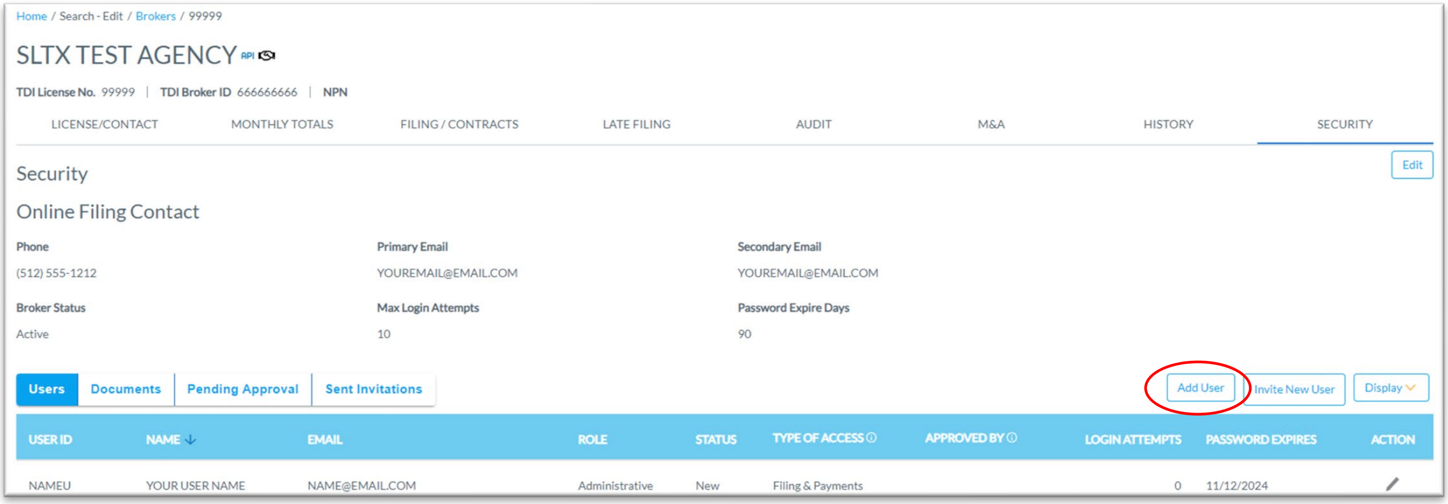
Primary Navigation
Click "Manage Users" from Broker Landing page.

This is where you (administrative user) will invite new users to SMART or manually create new SMART user profiles, edit or maintain existing user profiles (including resetting passwords), or update your Primary / Secondary (Online Filing) contact information. Note: Testing (or approval to begin filing) is not required unless you are an API (XML) filer, or your agency is using a 3rd party to make filings on your behalf. SMART's Programmer Technical Reference Manual includes details about the requirements for application / feature testing. Third-Party filers have specific user *and* testing requirements. Please contact TechSupport directly for further information.

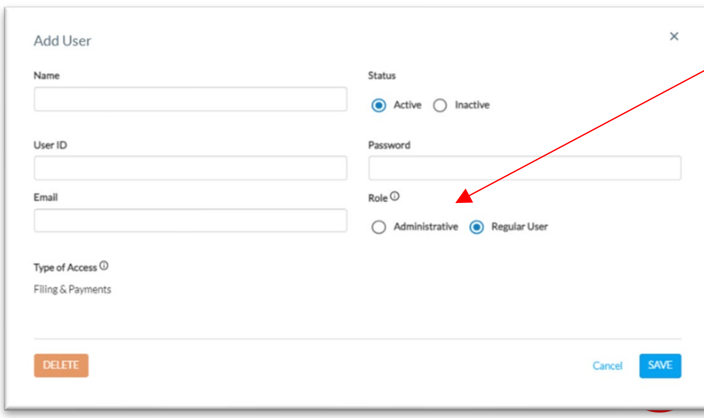


Add New Users

Step 1: Click Add User button to manually create or add a new user profile



Step 2: Input User's Name, User ID, Email, and Password. Once appropriate role for the user is selected, click SAVE.



*Clicking CANCEL will not save your changes!

Note: Administrative Authority allows user to create new and/or maintain user profiles.

Step 3: Contact your new user directly to provide them with their User ID and password.

Password Requirements

Must be a combination of alphanumeric characters, containing at least 1 special character, and between 8 and 20 characters long. Note: A password may not contain the broker or user's name(s) or User ID.

User ID Requirements

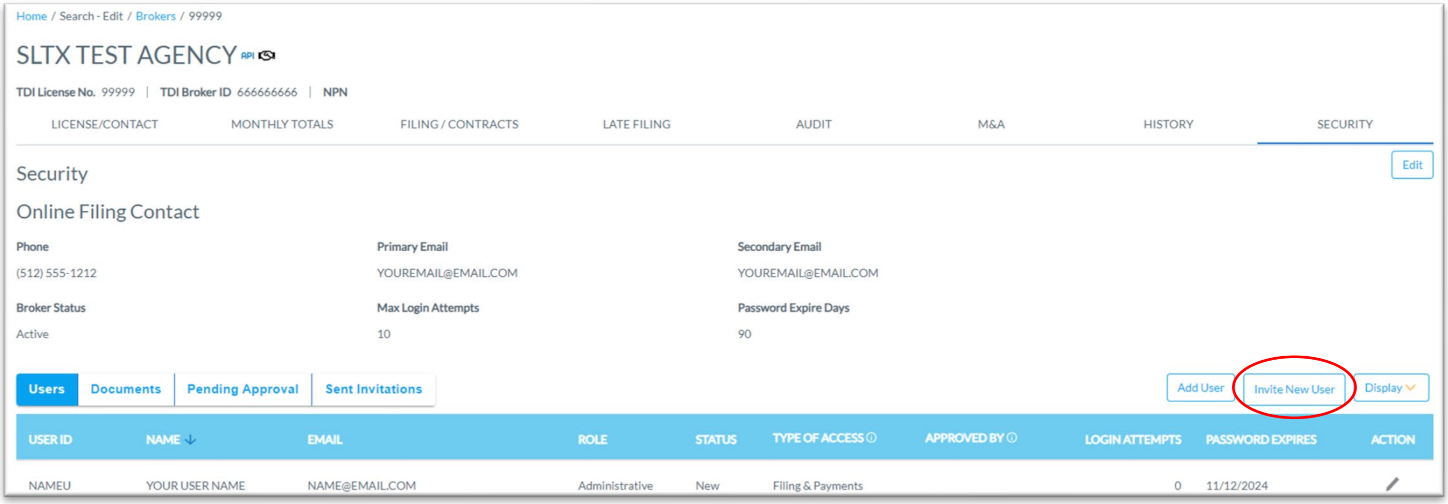
Must be between 3 and 10 characters long and unique. You will be prompted to select another User ID if prompted one is in use. Once created, a User ID cannot be changed.

Approved By

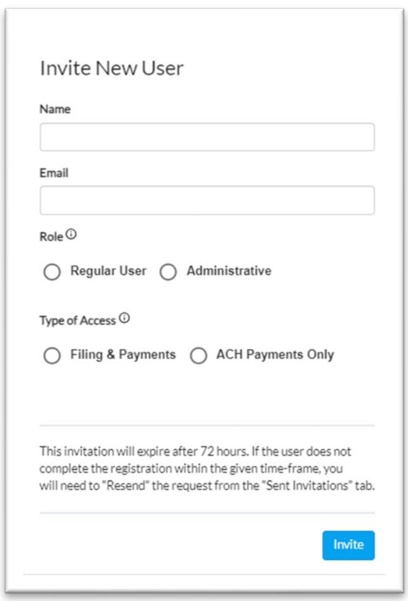
Name of SLTX employee who approved agency's user's test transactions, or license number of broker or agency where the user previously tested.

Invite New Users (Alternative Workflow from "Add New User")

Step 1: Click Invite New User button to invite new user to SMART, which allows invited user to create profile and password through a series of secure email communications directly from SMART.
<Benefit> You will not have to coordinate with that user to convey their new User ID and/or password.

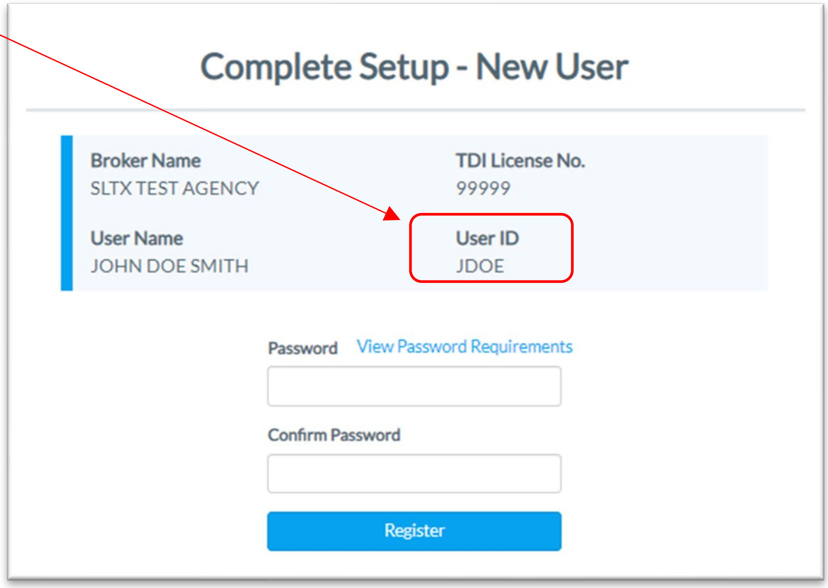


Step 2: Input User's Name and Email. Once appropriate role and type of access is selected, click INVITE. Note: Administrative Authority allows user to create new and/or maintain user profiles.



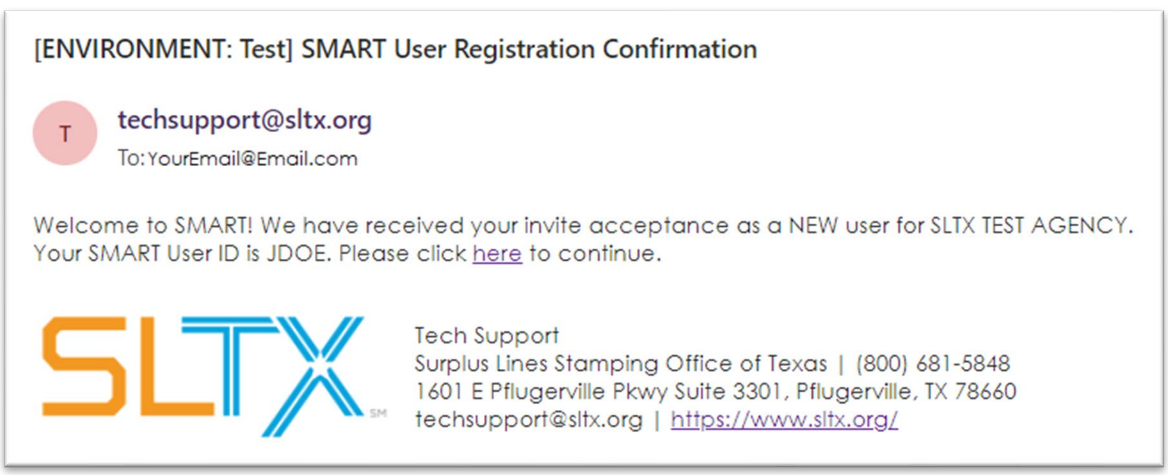
Step 3: Invited user will receive an email from SMART, which includes a link to allow final set-up of SMART user profile.

Step 4: After clicking link within Invitation email, **invited user** will be presented with automatically assigned User ID and allowed to input a password.



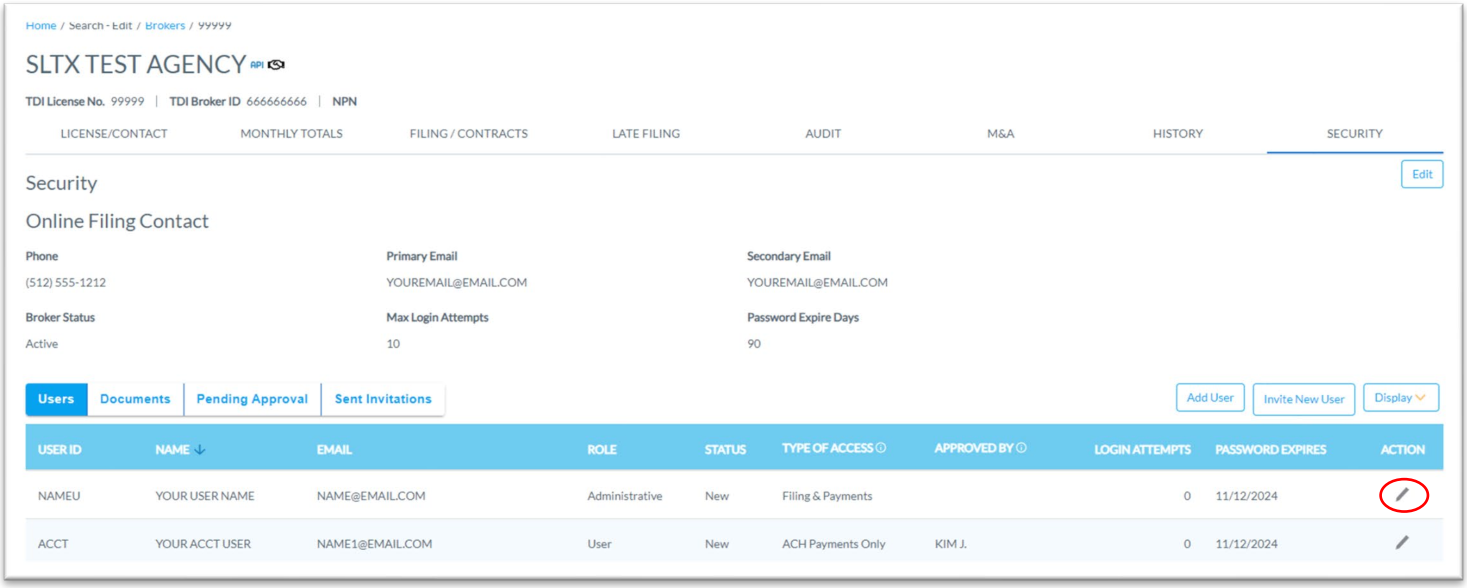
Step 5: After noting assigned User ID and creating a password, the **invited user** will click REGISTER to complete setup of their profile.

Step 6: Invited user will receive a confirmation email from SMART, which includes the assigned User ID and a link to continue to the Log In screen.

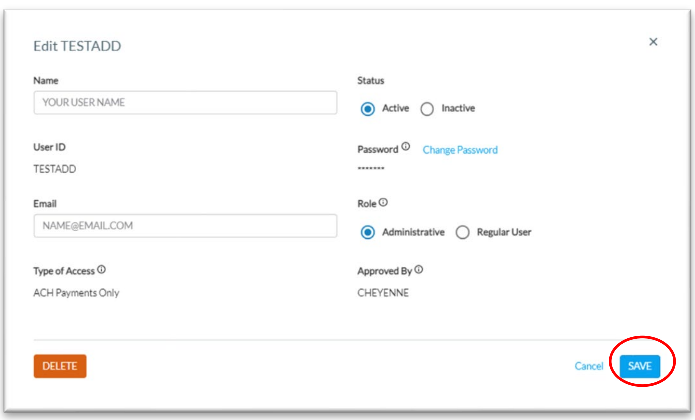


Edit Existing Users

Step 1: From the Users sub-section, click pencil icon from ACTION column to EDIT existing user profiles. Functions include updating User's Name, Email, Authority, Password (see [password requirements]), and/or inactivating or deleting a profile. Users associated with your agency will be shown. Note: Once created, User ID cannot be changed.



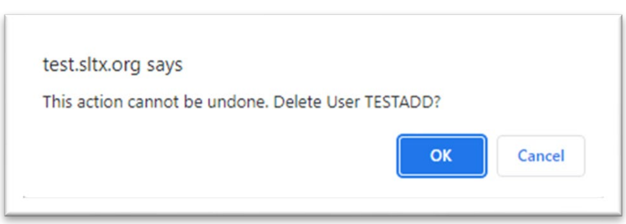
Step 2: Once changes have been made, click SAVE. Click CANCEL and return to Security Tab without saving changes.



*To change password, click "Change Password"

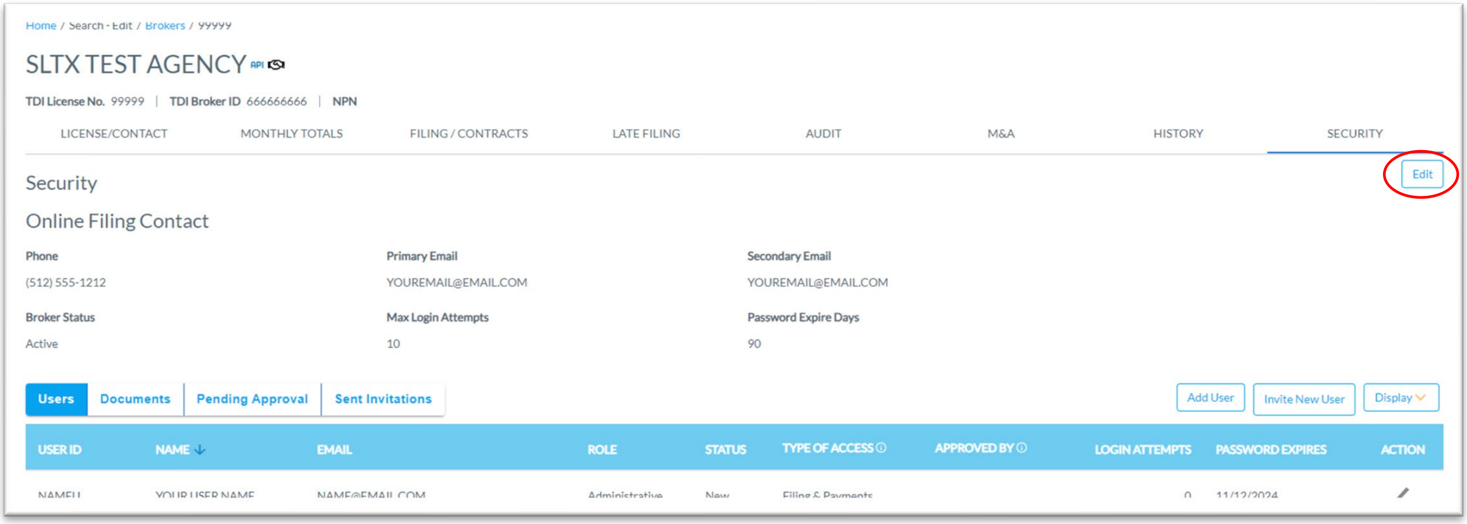
Step 3: To DELETE a user's profile, click DELETE.

Note: Confirm delete. It cannot be undone once confirmed.

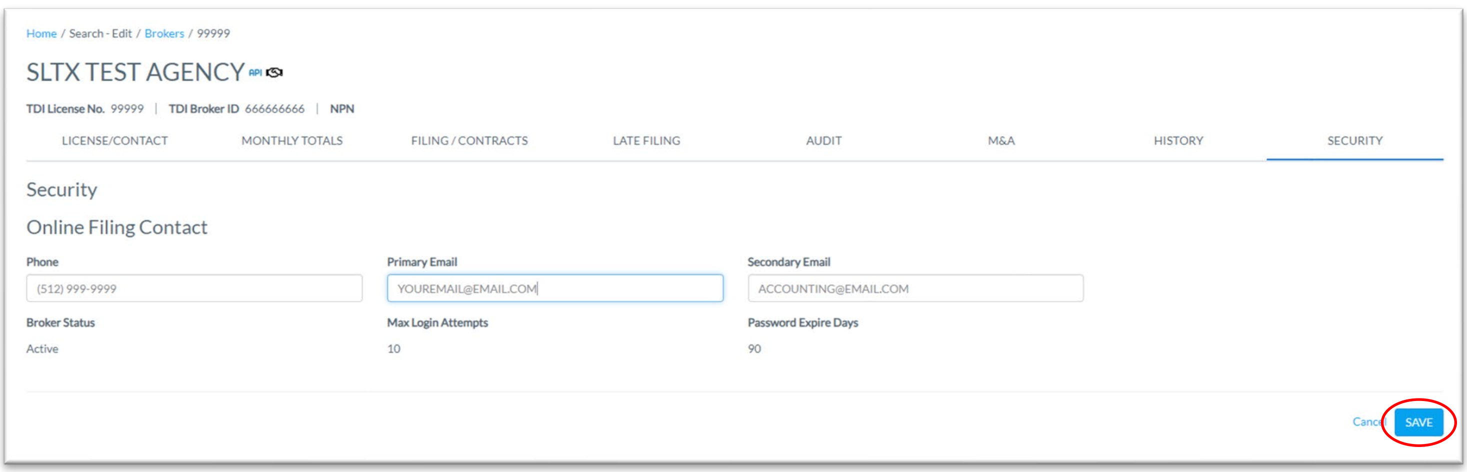


Edit Primary / Secondary (Online Filing) Contacts

Step 1: From Security section, click EDIT button to edit primary and secondary (online filing) contact information. Functions include updating Phone Number, Primary Email, and Secondary Email. SLTX uses your Primary and Secondary Email as an additional resource to distribute email notifications about upcoming changes or releases, improvements, scheduled system outages, and/or other invaluable information.

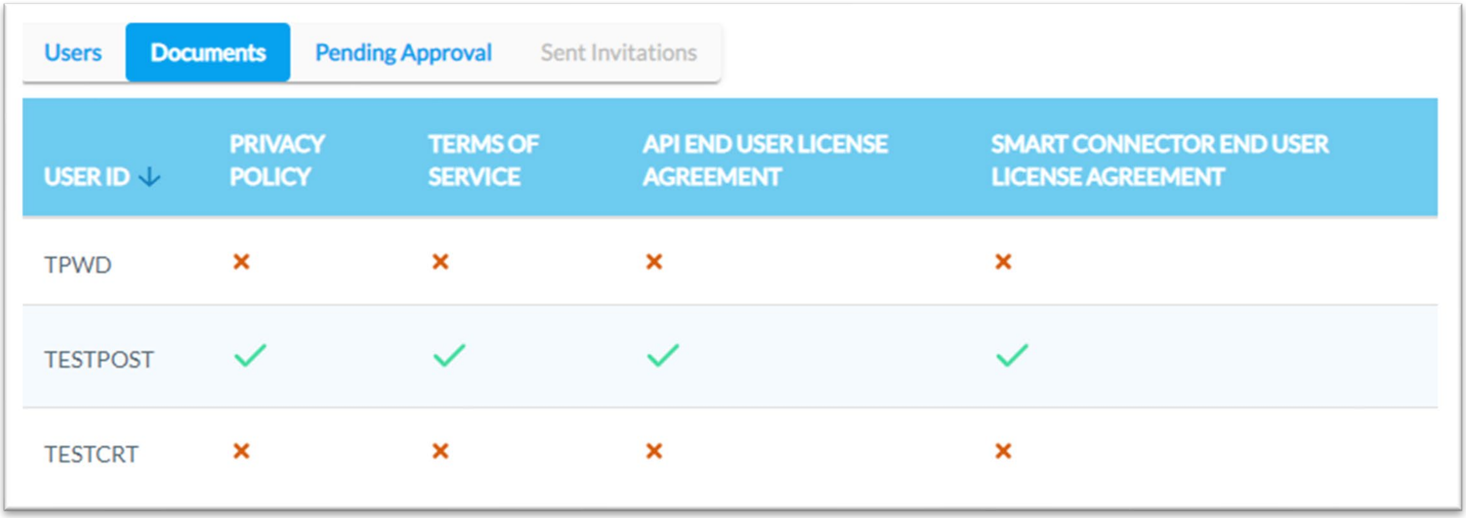


Step 2: Once changes have been made, click SAVE. Click CANCEL and return to Security Tab without saving changes.



Documents sub-section

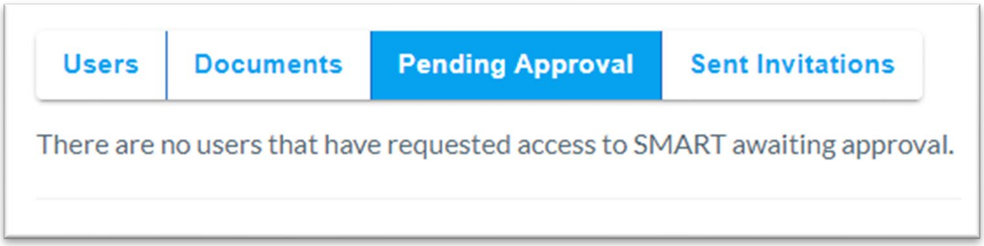
Illustrates the status of each user's acceptance of any necessary SMART End User Licensing Agreements (EULAs), Terms of Service (TOS), and/or Privacy Policies (PP). Hover over the check icon to see the date and time of the user's acceptance.



USER ID	PRIVACY POLICY	TERMS OF SERVICE	API END USER LICENSE AGREEMENT	SMART CONNECTOR END USER LICENSE AGREEMENT
TPWD	×	×	×	×
TESTPOST	✓	✓	✓	✓
TESTCRT	×	×	×	×

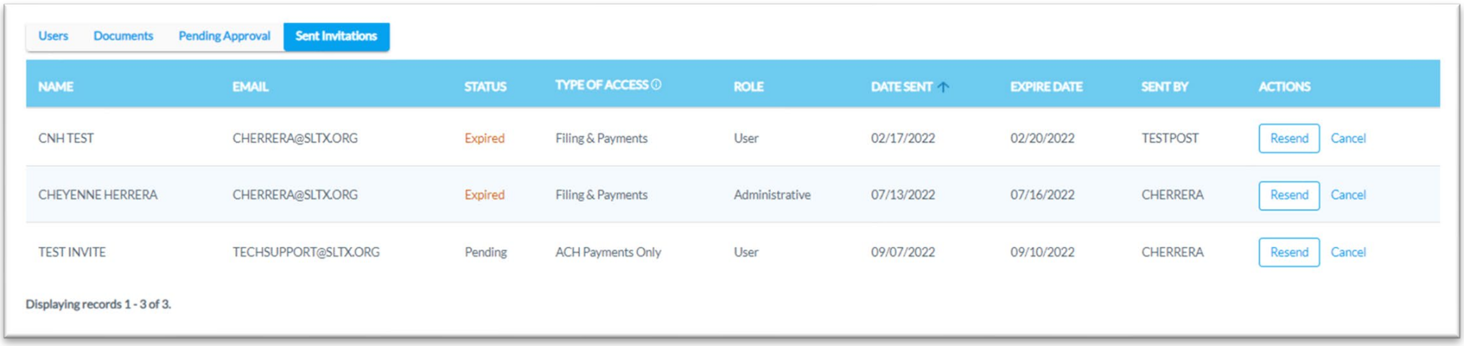
Pending Approval sub-section

Reflects any outstanding requests from users that have manually requested access to SMART, via the "Register / Create New User ID" option from the SMART Login page, that have not yet been approved (or denied) by an administrative user.



Sent Invitations sub-section
Reflects any outstanding or incomplete invitations. If necessary, administrative user may resend invitation by clicking RESEND.

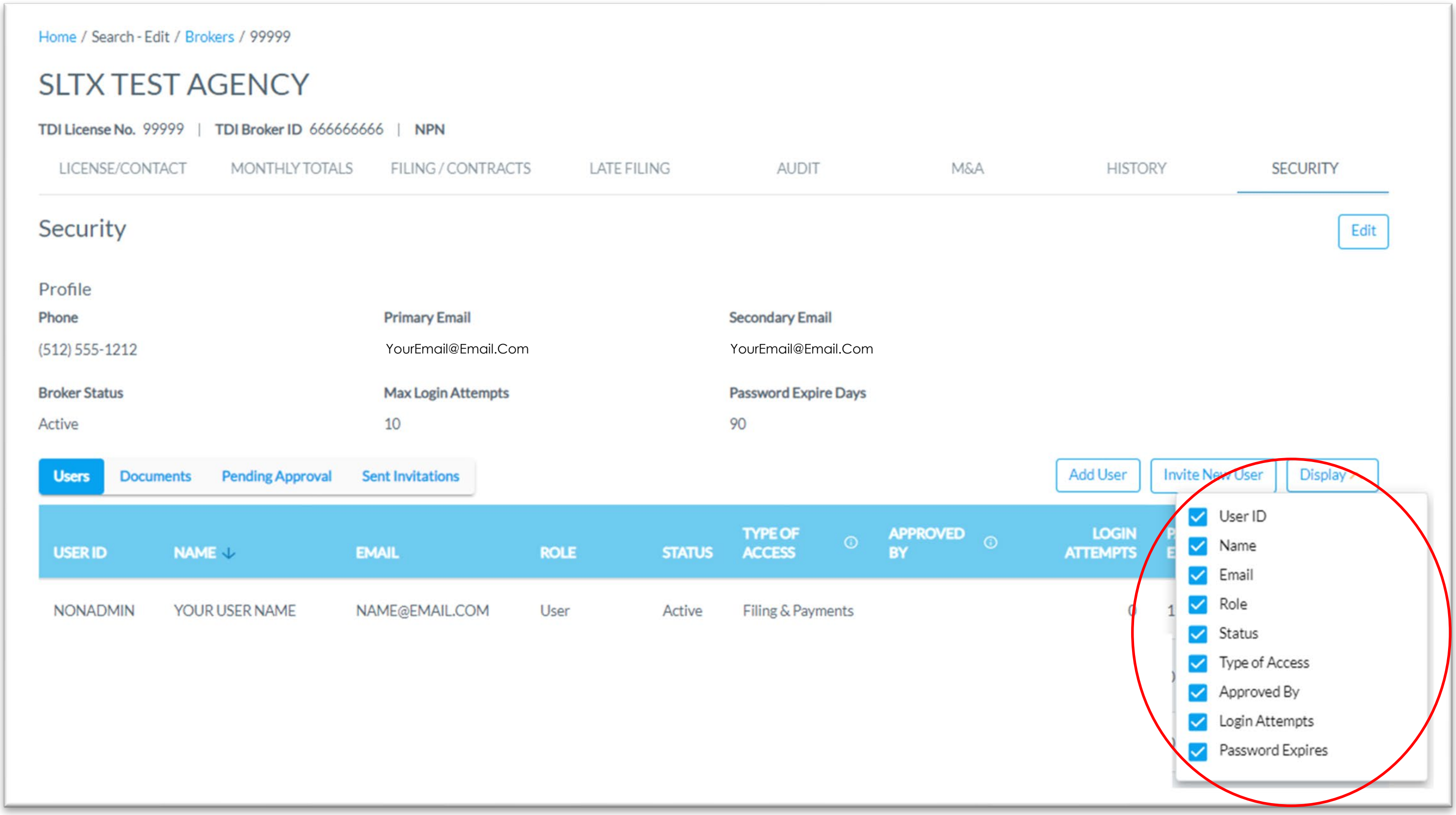
Note: once an invited user accepts and completes the [New User Invitation](), they will no longer be shown in the "Sent Invitations" sub-section.



Display Option for Users table

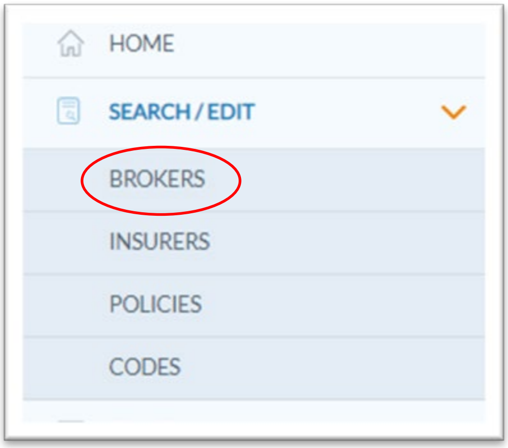
You may also control which basic information is displayed within Users table.

Note: Once selected, SMART will remember selection.

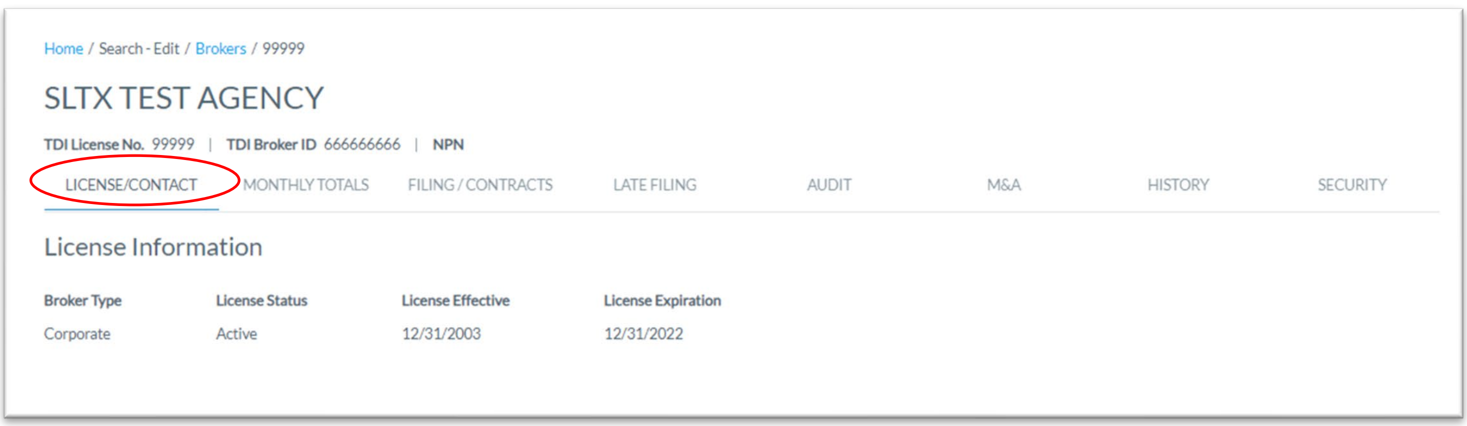


Alternative Navigation

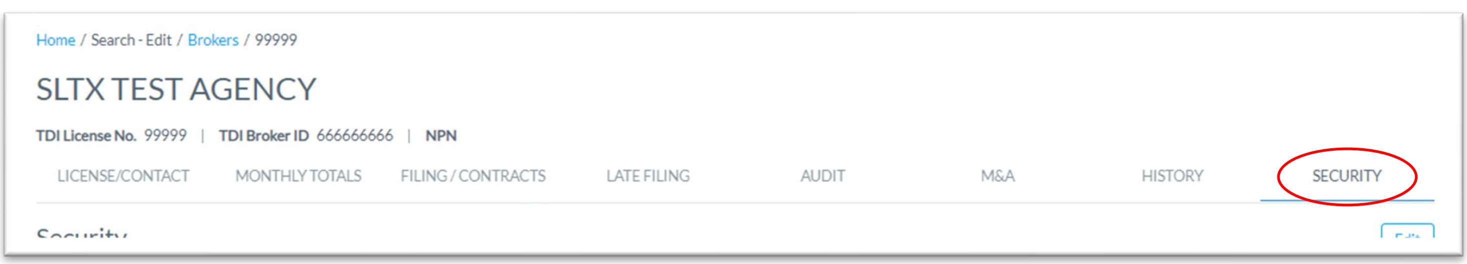
Step 1: Select Search/ Edit menu and click Brokers



Step 2: After clicking Brokers from Search/Edit menu, License/Contact tab is loaded by default.



Step 3: Select Security tab to perform all available user maintenance functions.



Version Changes

1.0

First documentation released for Search/Edit>Brokers>Security sub-section