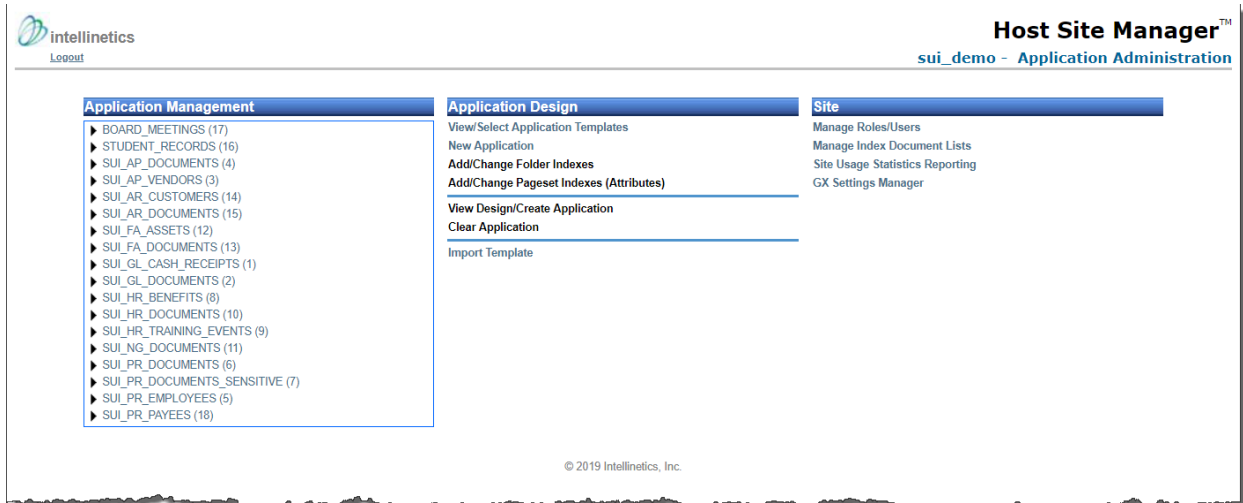


Host Site Manager

End User Manual



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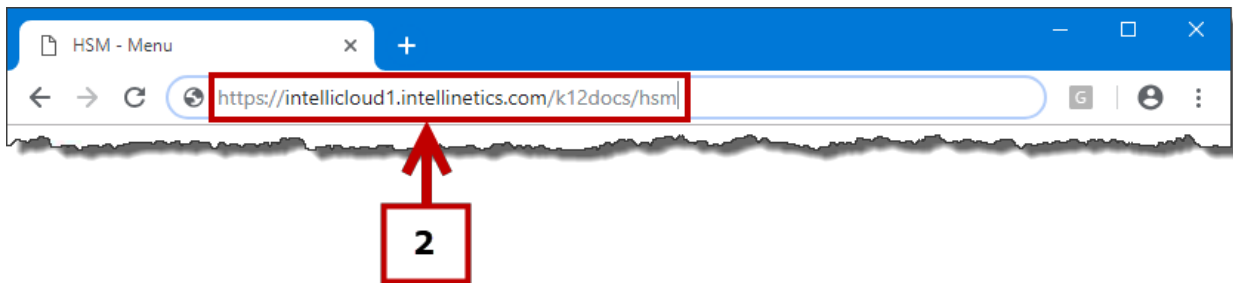
Login

To login to the Host Site Manager (HSM) website, follow the steps listed below:

Steps:

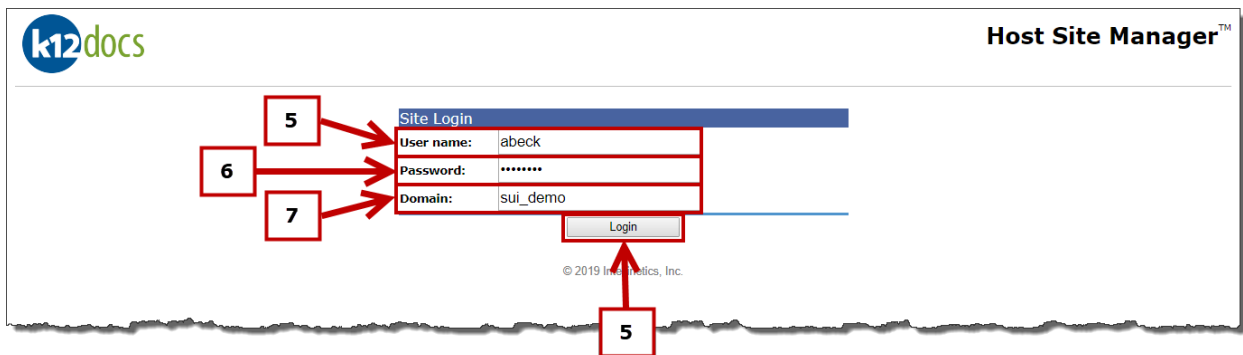
1. Launch a web browser (see Figure 1.1).
2. Enter the Host Site Manager web address into the URL field (see Figure 1.1).
3. Click on the Go To button or hit the Enter key on your keyboard (see Figure 1.1).

Figure 1.1



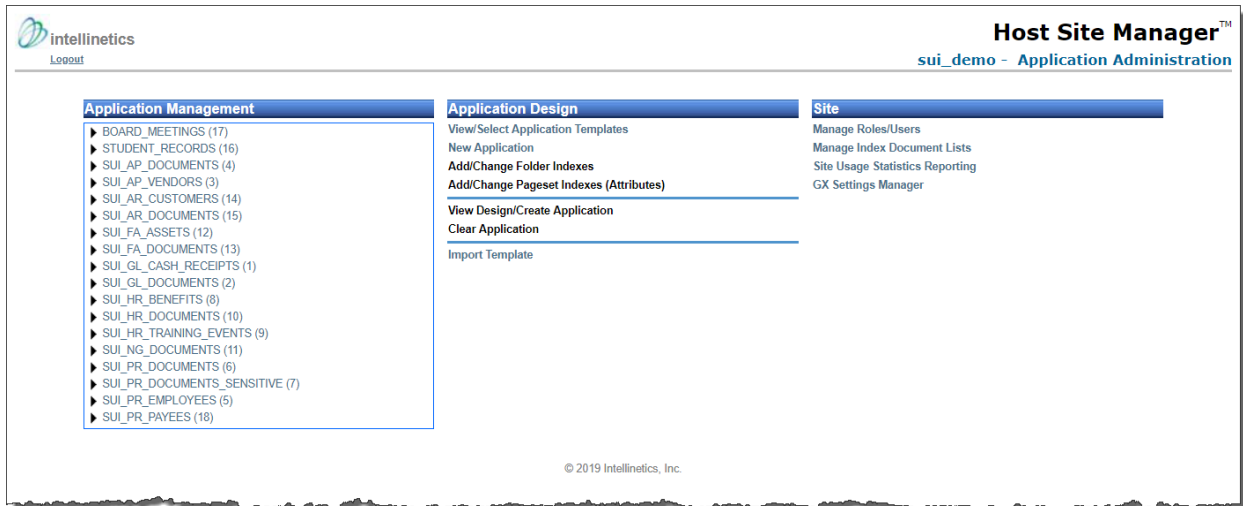
4. The HSM Site Login website will open (see Figure 1.2).
5. Enter your **username** into the User name: field (see Figure 1.2).
6. Enter your **password** into the Password: field (see Figure 1.2).
7. Enter the **domain** into the Domain: field (see Figure 1.2).
8. Click on the **Login** button (see Figure 1.2).

Figure 1.2



9. The HSM Application Administration website will open (see Figure 1.3).

Figure 1.3



Manage Roles/Users

The manage roles/users section allows you to add new users, modify existing users, and add users to roles. To manage roles/users, follow the steps listed below:

Adding a New User:

Steps:

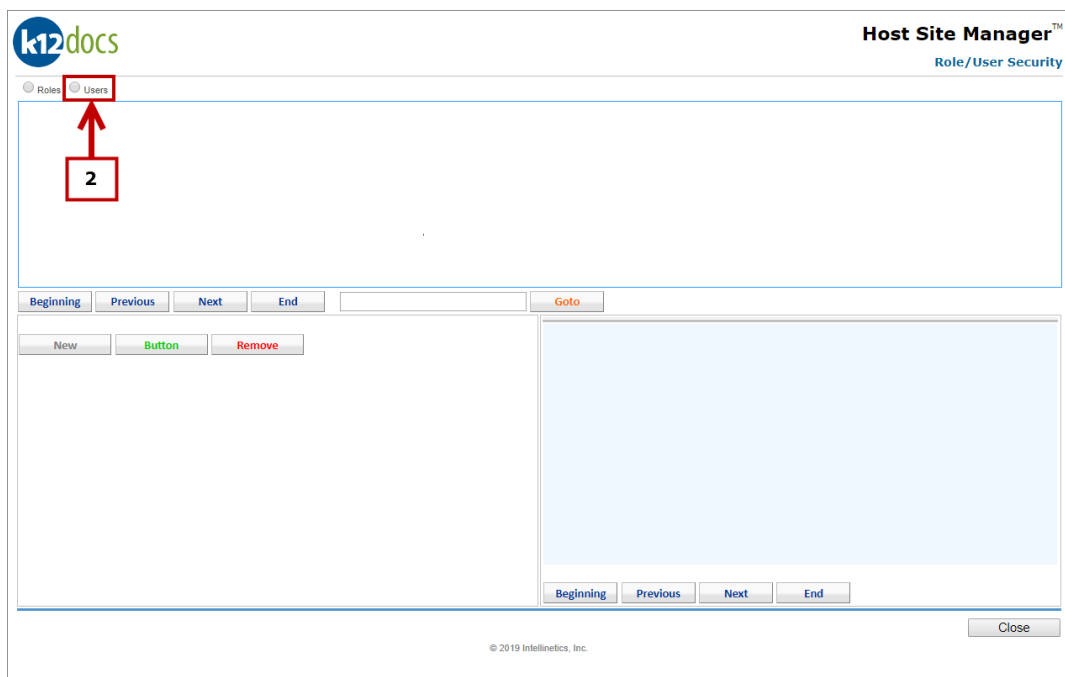
1. Click on the **Manage Roles/Users** button, located in the Site column (see *Figure 1.4*).

Figure 1.4



2. The **Role/User Security** page will open (see *Figure 1.5*).
3. Select the **Users** option (see *Figure 1.5*).

Figure 1.5



- The **Users** section will open (see Figure 1.6).
- Click on the **New** button (see Figure 1.6).

Figure 1.6

The screenshot displays the Host Site Manager Role/User Security interface. At the top left is the k12docs logo, and at the top right is the title 'Host Site Manager™ Role/User Security'. Below the title are radio buttons for 'Roles' and 'Users', with 'Users' selected. A table lists users with columns for Id, Login Name, Full Name, Description, and Status. Below the table are navigation buttons: 'Beginning', 'Previous', 'Next', 'End', and 'Goto'. A form for creating a new user is visible, with fields for 'User Full Name', 'User Description', 'User Login Name', 'User Password', and 'Confirm User Password'. There is a 'Create Random' button next to the password field. Below the form are checkboxes for 'Must change password at next login', 'Account is disabled', 'Account is an Active Directory Group', and 'Account is a Service Account'. At the bottom left, a 'New' button is highlighted with a red box, and a red arrow points from a box containing the number '5' to this button. To the right of the 'New' button are 'Add' and 'Remove' buttons. On the right side of the interface, there is a 'Member of Role:' section with a list of roles and checkboxes. At the bottom right is a 'Close' button. The footer contains the copyright notice '© 2019 Intellinetics, Inc.'

Id	Login Name	Full Name	Description	Status
9	abeck	Angela Beck	Intellinetics Demo User	Active
21	corey			Active
6	Gary	Gary VanBuhler	Gary	Active
1	HSMAdmin	HSMAdmin	HSMAdmin	Active
2	HSMNotify	HSMNotify	HSMNotify	Active
10	k12docscloudconnect	XLL Service Account		Active
15	k12docscloudconnect2			Active
22	k12docscloudconnect3			Active
12	neiltest	neiltest		Active
7	SAS	SAS	SAS	Active
5	SMITCAR	Carolyn Smith	Carolyn Smith	Active

5

6. Enter the users full name into the **User Full Name:** field (see Figure 1.7).
7. Optional. Enter a user description into the **User Description:** field (see Figure 1.7)
8. Enter a user login name into the **User Login Name:** field (see Figure 1.7).

Note a) If the user has access to SAS, their user name should match the user that is listed in the **Document Management User ID** field in SAS.

9. Enter a password for the new user into the **User Password:** field (see Figure 1.7).
10. Enter the password again into the **Confirm User Password:** field (see Figure 1.7).

Note a) If you want to create a random password for the new user, click on the Create Random button. A random password will appear below the the button. Enter this password into the User Password: field and Confirm User Password: field.

11. Optional. If you want the user to change their password at their next login, place a check in the **Must change password at next login** box (see Figure 1.7).

Figure 1.7

The screenshot shows a web form for creating a new user. The form includes the following fields and options:

- User Full Name:** John Smith (Callout 6)
- User Description:** (Empty field, Callout 7)
- User Login Name:** jsmith (Callout 8)
- User Password:** temp@ss4321 (Callout 9)
- Confirm User Password:** temp@ss4321 (Callout 10)
- Must change password at next login:** (Callout 11)
- Account is disabled:**
- Account is an Active Directory Group:**
- Account is a Service Account:**

Buttons at the bottom: New, Add, Remove. A "Create Random" button is located next to the User Password field.

12. Select which role(s) you would like the user to have access to (see Figure 1.8).

Note a) For example, if you want the user to have access to the SUI_AP_VENDORS application, you want to place them in the "SUI_AP_VENDORS_Full_Access" role.

Figure 1.8



13. Click on the **Add** button (see Figure 1.9).

Figure 1.9



14. The user is now added (see Figure 1.10).

Figure 1.10

The screenshot shows the 'Host Site Manager™ Role/User Security' interface. It features a table with columns for 'Id', 'Login Name', 'Full Name', 'Description', and 'Status'. The user 'jsmith' is highlighted with a red box. A red arrow points from a box labeled '14' below the table to the 'jsmith' row.

Id	Login Name	Full Name	Description	Status
9	abeck	Angela Beck	Intellinetics Demo User	Active
21	corey			Active
6	Gary	Gary VanBuhler	Gary	Active
1	HSMAdmin	HSMAdmin	HSMAdmin	Active
2	HSMNotify	HSMNotify	HSMNotify	Active
23	jsmith	John Smith		Active
10	k12docscloudconnect	XLL Service Account		Active
15	k12docscloudconnect2			Active
22	k12docscloudconnect3			Active
12	neiltest	neiltest		Active
7	SAS	SAS	SAS	Active

Modifying an Existing User:

Steps:

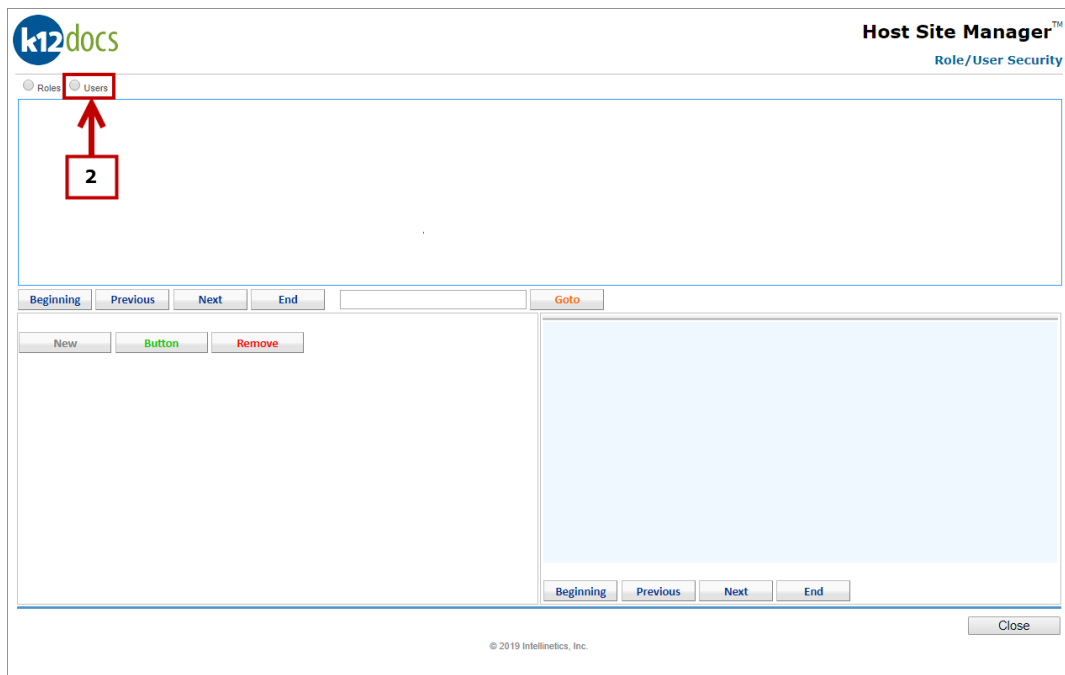
1. Click on the **Manage Roles/Users** button, located in the Site column (see Figure 1.11).

Figure 1.11



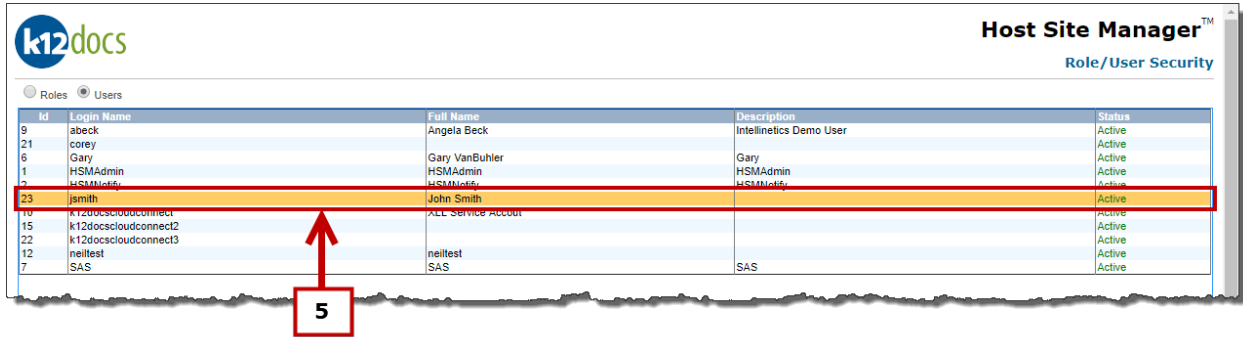
2. The **Role/User Security** page will open (see Figure 1.12).
3. Select the **Users** option (see Figure 1.12).

Figure 1.12



4. The **Users** section will open (see *Figure 1.13*).
5. Select the user account you want to modify (see *Figure 1.13*).

Figure 1.13



6. Update the user’s account details as needed (see *Figure 1.14*).

Note

a) Types of updates that can occur here are:

- Updating password
- Disabling user’s account
- Adding the user to a new role
- Removing a user from a role
- Deleting a user’s account

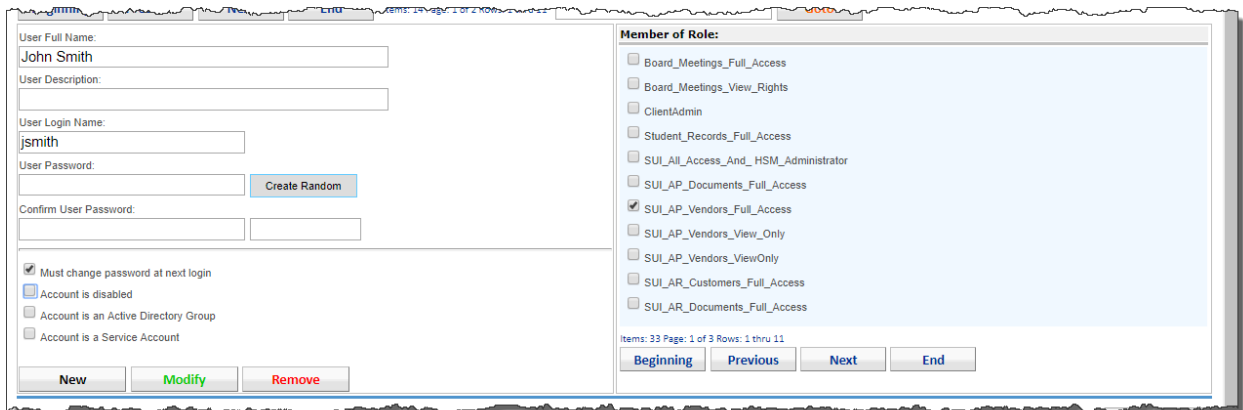
7. Click on the **Modify** button (see *Figure 1.4*).

Note

a) To delete a user’s account, select the **Remove** button.

Figure 1.14

Before



After



8. The user account is now modified (see Figure 1.15).

Figure 1.15

