

# Host Site Manager

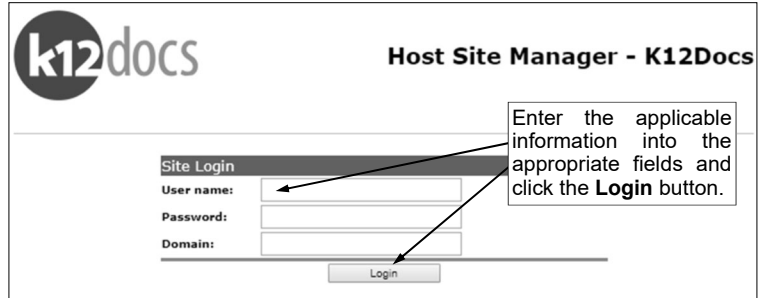
## Logging into Host Site Manager:

1. Access the Host Site Manager application at: <https://intellicloud1.intellinetics.com/K12Docs/hsm>

2. At the Site Login screen (see **Diagram A**), enter the following information:

- Enter the user name of the K12Docs user defined with an administrator role in the User Name field.

**Note:** Only K12Docs users who are defined with an administrator role are able to log into Host Site Manager.



**Diagram A**

- Enter the valid password for the K12Docs user defined with an administrator role in the Password field. Remember the password is case sensitive.
- In the Domain field, enter the K12Docs domain assigned to your organization by Software Unlimited, Inc.

3. Click the **Login** button.

**Tip:** Initially when first setting up the K12Docs users at your district, log into Host Site Manager with **SAS** as the user name and **sui@1979** as the password; then after the necessary users are defined for your district, including at least one that is set up with the administrator role, delete or disable the SAS user.

## Adding a New User:

In the Host Site Manager application, define the users who will have access to the K12Docs module. Refer to **Handout #2** for the instructions for adding new users in Host Site Manager.

## Deleting or Disabling a User:

**Note:** The required users, including the HSMAdmin, HSMNotify, SUIAdmin, and Svcuser users (and the K12Docsccloudconnect user, if applicable), cannot be deleted.

1. Log into Host Site Manager.
2. On the main Application Administration screen, select **Manage Roles/Users** in the Site section. See **Diagram B**.

3. At the Role/User Security screen (see **Diagram C**), click the **Users** option.

4. Select the user to delete or disable by clicking once on the desired user.

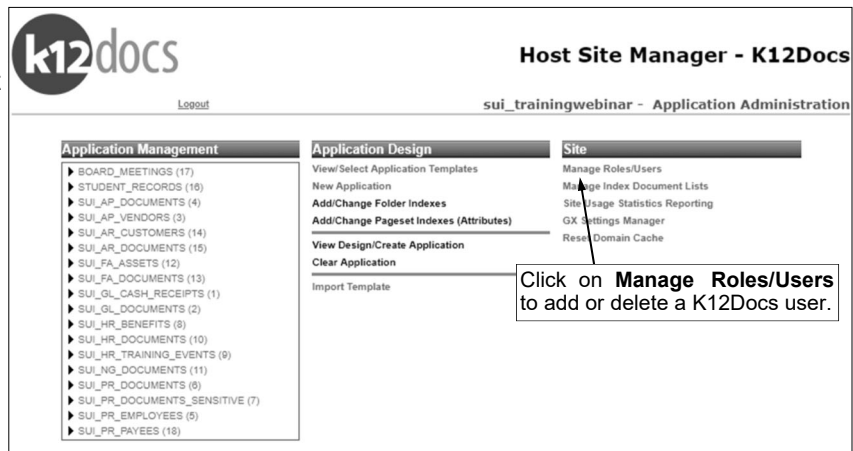
**Tip:** If needed, use the navigation buttons (**Beginning**, **Previous**,

**Next**, or **End** button) located in the middle of the screen (under the list of users) to scroll through all users, or enter search criteria into the search box and click the **Goto** button to be taken to the page of users containing the search information.

5. The user will appear in the lower left-hand corner of the screen.

6. Select to delete or disable the user as desired.

- To disable a user, select the Account is disabled field; and then click the **Modify** button.
- To delete a user, click the **Remove** button.



**Diagram B**

- Click the **Close** button in the lower right-hand corner to close the Role/User Security screen.

**Role/User Security**

Select **Users** to add or delete a K12Docs user.

Id	Login Name	Full Name	Description	Status
52	BAS	Becky Sampson		Active
1	HSMAdmin	HSMAdmin	HSMAdmin	Active
2	HSMNotify	HSMNotify	HSMNotify	Active
4	SAS	SAS	SAS	Active
3	SUIAdmin			Active
5			Service User	Active

Select a user to edit or delete by clicking once on the user; then the user will appear in the working area below.

If there are a number of users defined, use the navigation buttons here to scroll through the pages of users. In this example, there is only one page of users.

Beginning Previous Next End Items: 6 Page: 1 of 1 Rows: 1 thru 6 Goto

User Full Name: Becky Sampson  
 User Description:  
 User Login Name: BAS  
 User Password:  
 Confirm User Password:  
 User Email:

Member of Role:  
 Board\_Meetings\_Full\_Access  
 ClientAdmin  
 Student\_Records\_Full\_Access  
 SUI\_All\_Access\_And\_HSM\_Administrator  
 SUI\_AP\_Documents\_Full\_Access  
 SUI\_AP\_Vendors\_Full\_Access  
 SUI\_AR\_Customers\_Full\_Access  
 SUI\_AR\_Documents\_Full\_Access  
 SUI\_FA\_Assets\_Full\_Access  
 SUI\_FA\_Documents\_Full\_Access  
 SUI\_Full\_Access

Items: 28 Page: 1 of 3 Rows: 1 thru 11  
 Beginning Previous Next End

Must change password at next login  
 Account is disabled  
 Account is an Active Directory Group  
 Account is a Service Account

New Modify Remove

To disable the selected user, select the Account is disabled field and then click the **Modify** button.

To delete the selected user, click the **Remove** button.

Close

### Adding New Values to a Document Attribute Drop-Down List:

Diagram C

- Log into Host Site Manager.
- On the main Application Administration screen, click once on the application for which to edit in the Application Management section. See **Diagram D**.
- The record for the selected application will expand.
- Click once on the **Pageset Index Dropdowns** option.

**k12docs** Host Site Manager - K12Docs

Logout sui\_trainingwebinar - Application Administration

**Application Management**

- ▶ BOARD\_MEETINGS (17)
- ▶ STUDENT\_RECORDS (18)
- ▶ SUI\_AP\_DOCUMENTS (4)
- ▶ SUI\_AP\_VENDORS (3)
- ▶ SUI\_AR\_CUSTOMERS (14)
- ▶ SUI\_AR\_DOCUMENTS (15)
- ▶ SUI\_FA\_ASSETS (12)
- ▶ SUI\_FA\_DOCUMENTS (13)
- ▶ SUI\_GL\_CASH\_RECEIPTS (1)
- ▶ SUI\_GL\_DOCUMENTS (2)
- ▶ SUI\_HR\_BENEFITS (8)
- ▶ SUI\_HR\_DOCUMENTS (10)
- ▶ SUI\_HR\_TRAINING\_EVENTS (9)
- ▶ SUI\_ING\_DOCUMENTS (11)
- ▶ SUI\_PR\_DOCUMENTS (8)
- ▶ SUI\_PR\_DOCUMENTS\_SENSITIVE (7)
- ▼ SUI\_PR\_EMPLOYEES (5)
  - ▶ Application Design Summary
  - ▶ Bookmarks
  - ▶ Folder Index Dropdowns
  - ▶ Pageset Index Dropdowns
  - ▶ Subfolders
  - ▶ Subfolder Bookmarks
  - ▶ Subfolder Restrictions
  - ▶ LSM Usage
  - ▶ Add to template library
  - ▶ Delete
  - ▶ Add/Modify Folder Index
  - ▶ Add/Modify Pageset Index

**Application Design**

- View/Select Application Templates
- New Application
- Add/Change Folder Indexes
- Add/Change Pageset Indexes (Attributes)
- View Design/Create Application
- Clear Application
- Import Template

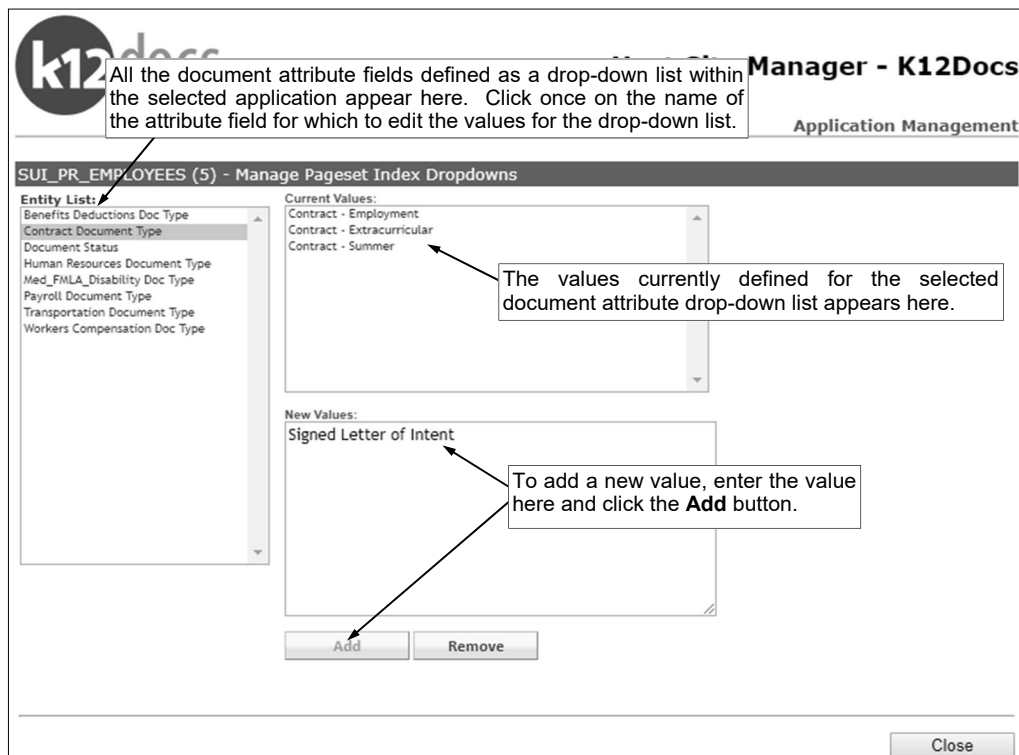
**Site**

- Manage Roles/Users
- Manage Index Document Lists
- Site Usage Statistics Reporting
- GX Settings Manager
- Reset Domain Cache

To add a new value to a document attribute drop-down list, first select the desired application and then click **Pageset Index Dropdowns**. In this example, we want to add a new value to the document attribute drop-down list for Contract Document Type within the SUI\_PR\_Employees application.

Diagram D

5. At the Manage Pageset Index Dropdowns screen for the selected application, click once on the document attribute to edit in the Entity List. See **Diagram E**.
6. The current values defined for the selected document attribute drop-down list appear in the Current Values section.
7. To add a new value, enter the description to use as the value in the New Values field and then click the **Add** button.
8. The newly added value will appear at the bottom of the list in the Current Values section.  
**Note:** The defined values will be listed in alphabetical order after refreshing the screen within Host Site Manager and also when completing the attribute field for a document.
9. Repeat Steps 7 and 8 until all the new values have been added.
10. Click the **Close** button in the lower right-hand corner to close the Manage Pageset Index Dropdowns screen.



**Diagram E**

# Managing Users in Host Site Manager

Users who need direct access to K12Docs will need to be set up in Host Site Manager by an administrator and given the applicable access to each application by assigning the user to specific roles. Host Site Manager can be accessed at: <https://intellicloud1.intellinetics.com/K12Docs/hsm>

## Adding a New User through Host Site Manager:

1. Log into Host Site Manager.
2. From the Application Administration screen, select **Manage Roles/Users** in the Sites section.
3. At the Role/User Security screen, click the **Users** option.
4. Complete the fields in the lower left-hand side of the screen. See **Diagram A**.
  - a. Enter the full name for the user in the User Full Name field. The name is optional and can be up to **100** characters long.
  - b. Enter the description for the user in the User Description field. The description is optional and can be up to **100** characters long.
  - c. Enter a login name for the user in the User Login Name field. The name is required and can be up to **64** characters long.
  - d. Enter a password for the new user in the User Password field. The password can be alphanumeric and up to **32** characters long (no spaces).
 

**Note:** If desired, to create a random password for the new user, click the **Create Random** button. A random password will appear below the button. Enter this password into the User Password and Confirm User Password fields.
  - e. Reenter the new password again in the Confirm User Password field.
  - f. Enter the user's email address in the User Email field. The email address can be up to **100** characters long.
 

**Tip:** The User Email field must be completed in order for the user to utilize the Forgot Password feature when logging into K12Docs. The email address entered in this field can also be used with sending custom notification emails for search activity workflows, if desired.
  - g. To require the user to change their password at their next login, select the Must change password at next login field. A checkmark will appear in the box if the field is selected.
  - h. Leave the remaining three checkbox fields unselected.
5. Click the **Add** button. The new user will be added to the list of existing users.
6. Click the **Close** button in the lower right-hand corner to close the Role/User Security screen.

Role/User Security

Roles  Users

Id	Login Name	Full Name	Description	Status
52	BAS	Becky Sampson		Active
1	HSMAdmin	HSMAdmin	HSMAdmin	Active
2	HSMNotify	HSMNotify	HSMNotify	Active
4	SAS	SAS	SAS	Active
3	SUIAdmin			Active
5	Svcuser	Service User	Service User	Active

From the Users screen, enter the information for the new user, either assign a specific password or choose to create a random password, and when complete, click the **Add** button to save the new user.

Beginning Previous Next End Items: 6 Page: 1 of 1 Rows: 1 thru 6 Goto

User Full Name: Julia Anderson

User Description: Julia Anderson

User Login Name: ANDEJUL

User Password: t6e1e6

Confirm User Password: t6e1e6 t6e1e6

User Email:

Must change password at next login  
 Account is disabled  
 Account is an Active Directory Group  
 Account is a Service Account

Member of Role:

Board\_Meetings\_Full\_Access  
 ClientAdmin  
 Student\_Records\_Full\_Access  
 SUI\_All\_Access\_And\_HSM\_Administrator  
 SUI\_AP\_Documents\_Full\_Access  
 SUI\_AP\_Vendors\_Full\_Access  
 SUI\_AR\_Customers\_Full\_Access  
 SUI\_AR\_Documents\_Full\_Access  
 SUI\_FA\_Assets\_Full\_Access  
 SUI\_FA\_Documents\_Full\_Access  
 SUI\_Full\_Access

Items: 28 Page: 1 of 3 Rows: 1 thru 11

Beginning Previous Next End

New Add Remove

Close

**Diagram A**

### **Assigning Roles to New or Existing Users through Host Site Manager:**

**Note:** Users can either be assigned to roles for easy access to each application or they will have to be separately assigned access to an application. Unique roles have already been setup in Host Site Manager for your use. When adding a new user, assign the corresponding role to the application so they will have direct access to it in K12Docs.

1. Log into Host Site Manager.
2. From the Application Administration screen, select **Manage Roles/Users** in the Sites section.
3. At the Roles/User Security screen, click the **Users** option. A list of users will appear.
4. Select the user to assign roles.  
**Tip:** If there are more than 11 defined users, use the navigation buttons (Beginning, Previous, Next, or End button) in the middle of the screen to scroll through all users, or enter search criteria into the search box and select the **Goto** button to be taken to the page of users containing the search information.
5. The user will appear in the lower left-hand corner. Assign the applicable roles to the user by selecting the checkbox next to each role in the Member of Role section. Use the navigation buttons in this section to scroll through the various roles. Below is a list of predefined roles and the applicable rights for access to K12Docs. See **Diagram B** and example role assignments on **Page D**.
  - a. Board\_Meetings\_Full\_Access: Users will have full access to the Board\_Meetings application and all subfolders.
  - b. ClientAdmin: This is an administrative role used for setting up the customer's domain and should not be changed.
  - c. Student\_Records\_Full\_Access: Users will have full access to the Student\_Records application and all subfolders.
  - d. SUI\_All\_Access\_And\_HSM\_Administrator: Users will have full access to all SUI applications, including the Board\_Meetings and Student\_Records applications, and will have full access to all employee folders and subfolders, as well as full access to Host Site Manager.
  - e. SUI\_AP\_Documents\_Full\_Access: Users will have full access to the SUI\_AP\_Documents application and all subfolders.
  - f. SUI\_AP\_Vendors\_Full\_Access: Users will have full access to the SUI\_AP\_Vendors application and all subfolders.
  - g. SUI\_AR\_Customers\_Full\_Access: Users will have full access to the SUI\_AR\_Customers application and all subfolders.
  - h. SUI\_AR\_Documents\_Full\_Access: Users will have full access to the SUI\_AR\_Documents application and all subfolders.
  - i. SUI\_FA\_Assets\_Full\_Access: Users will have full access to the SUI\_FA\_Assets application and all subfolders.
  - j. SUI\_FA\_Documents\_Full\_Access: Users will have full access to the SUI\_FA\_Documents application and all subfolders.
  - k. SUI\_Full\_Access: Users will have full access to all SUI applications, including the Board\_Meetings and Student\_Records applications, and will have full access to all employee subfolders.
  - l. SUI\_GL\_Cash\_Receipts\_Full\_Access: Users will have full access to the SUI\_GL\_Cash\_Receipts application and all subfolders.
  - m. SUI\_GL\_Documents\_Full\_Access: Users will have full access to the SUI\_GL\_Documents application and all subfolders.
  - n. SUI\_HR\_Benefits\_Full\_Access: Users will have full access to the SUI\_HR\_Benefits application and all subfolders.
  - o. SUI\_HR\_Documents\_Full\_Access: Users will have full access to the SUI\_HR\_Documents application and all subfolders.
  - p. SUI\_HR\_Training\_Events\_Full\_Access: Users will have full access to the SUI\_HR-Training\_Events application and all subfolders.

- q. SUI\_NG\_Documents\_Full\_Access: Users will have full access to the SUI\_NG\_Documents application and all subfolders.
  - r. SUI\_PR\_Documents\_Full\_Access: Users will have full access to the SUI\_PR\_Documents application and all subfolders.
  - s. SUI\_PR\_Documents\_Sensitive\_Full\_Access: Users will have full access to the SUI\_PR\_Documents\_Sensitive application and all subfolders.
  - t. SUI\_PR\_Employees\_Full\_Access: Users will have full access to the SUI\_PR\_Employees application and all subfolders.
  - u. SUI\_PR\_Employees\_Human\_Resources: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Human Resources, Contracts, Benefits/Deductions, and Transportation subfolders.
  - v. SUI\_PR\_Employees\_Payroll: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Contracts, Benefits/Deductions, Payroll, and Leave Requests subfolders.
  - w. SUI\_PR\_Employees\_Transportation\_Only: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Transportation subfolder.
  - x. SUI\_PR\_Payees\_Full\_Access: Users will have full access to the SUI\_PR\_Payees application and all subfolders.
  - y. SUI\_ServiceUser: This is an administrative role used for connecting K12Docs to the School Accounting System and should not be changed.
  - z. If using the Location index values for employees, then these additional roles can be utilized:
    - SUI\_PR\_Employees\_Elementary\_Human\_Resources\_Only: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Human Resources subfolder for those employees assigned to the Elementary location index.
    - SUI\_PR\_Employees\_High\_School\_Human\_Resources\_Only: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Human Resources subfolder for those employees assigned to the High School location index.
    - SUI\_PR\_Employees\_Middle\_Human\_Resources\_Only: Users will have restricted access to the SUI\_PR\_Employees application with rights to only the Human Resources subfolder for those employees assigned to the Middle School location index.
  - aa. SUI\_All\_Read\_Only\_Access: Users will have search, read, and print access to all applications, including all employee folders and subfolders.
6. Once all applicable roles have been assigned, click the **Modify** button.
  7. Click the **Close** button in the lower right-hand corner to close the Role/User Security screen.

The screenshot displays the 'Role/User Security' configuration interface. On the left, the user profile for 'Becky Sampson' is shown, including fields for User Full Name, User Description, User Login Name (BAS), User Password, Confirm User Password, and User Email. Below these fields are checkboxes for account settings: '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 are 'New', 'Modify', and 'Remove' buttons. On the right, the 'Member of Role:' section lists various roles with checkboxes. Three roles are checked: 'Board Meetings\_Full\_Access', 'Student\_Records\_Full\_Access', and 'SUI\_AP\_Vendors\_Full\_Access'. Other roles like 'ClientAdmin', 'SUI\_All\_Access\_And\_HSM\_Administrator', 'SUI\_AP\_Documents\_Full\_Access', 'SUI\_AR\_Customers\_Full\_Access', 'SUI\_AR\_Documents\_Full\_Access', 'SUI\_FA\_Assets\_Full\_Access', 'SUI\_FA\_Documents\_Full\_Access', and 'SUI\_Full\_Access' are unchecked. At the bottom right of the role list are 'Beginning', 'Previous', 'Next', and 'End' buttons. A 'Close' button is located at the bottom right of the entire window. Two callout boxes provide context: one points to the 'Modify' button with the text 'After selecting the roles, click the Modify button to save the changes.' and another points to the three checked roles with the text 'In this example, Becky Sampson has been assigned to three roles, giving her full access to the Board Meetings, Student Records, and SUI\_AP\_Vendors applications.'

**Diagram B**

### **Sample Role Assignment for Users**

Below are examples of K12Docs users with specifically assigned roles.

**Example 1:** User with Full Access to all SUI Applications and Host Site Manager

*Role Needed:*

SUI\_Full\_Access\_And\_HSM\_Administrator

**Example 2:** User with Full Access to all SUI Applications

*Role Needed:*

SUI\_Full\_Access

**Example 3:** Accounts Payable User

*Roles Needed:*

SUI\_AP\_Documents\_Full\_Access

SUI\_AP\_Vendors\_Full\_Access

**Example 4:** Human Resources User

*Roles Needed:*

SUI\_HR\_Benefits\_Full\_Access

SUI\_HR\_Documents\_Full\_Access

SUI\_HR\_Training\_Events\_Full\_Access

SUI\_NG\_Documents\_Full\_Access

SUI\_PR\_Documents\_Full\_Access

SUI\_PR\_Documents\_Sensitive\_Full\_Access (if applicable)

Either SUI\_PR\_Employees\_Full\_Access or SUI\_PR\_Employees\_Human\_Resources\_Only

**Example 5:** Payroll User

*Roles Needed:*

SUI\_PR\_Documents\_Full\_Access

SUI\_PR\_Documents\_Sensitive\_Full\_Access (if applicable)

Either SUI\_PR\_Employees\_Full\_Access or SUI\_PR\_Employees\_Payroll

**Example 6:** Elementary School Principal User

*Roles Needed:*

Not Using Location Index for Employees:

SUI\_PR\_Employees\_Human\_Resources

Using Location Index for Employees:

SUI\_PR\_Employees\_Elementary\_Human\_Resources\_Only

**Example 7:** Transportation Supervisor User

*Roles Needed:*

SUI\_PR\_Employees\_Transportation\_Only

**Example 8:** User with Read Only Access to all Applications

*Role Needed:*

SUI\_All\_Read\_Only\_Access