



Helion Common
Software Manual

Helion Management

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Introduction

The Helion Management system is a web application for managing Helion users, stations, departments, software instances, and reports. The Helion Management home page is shown in Figure 1.

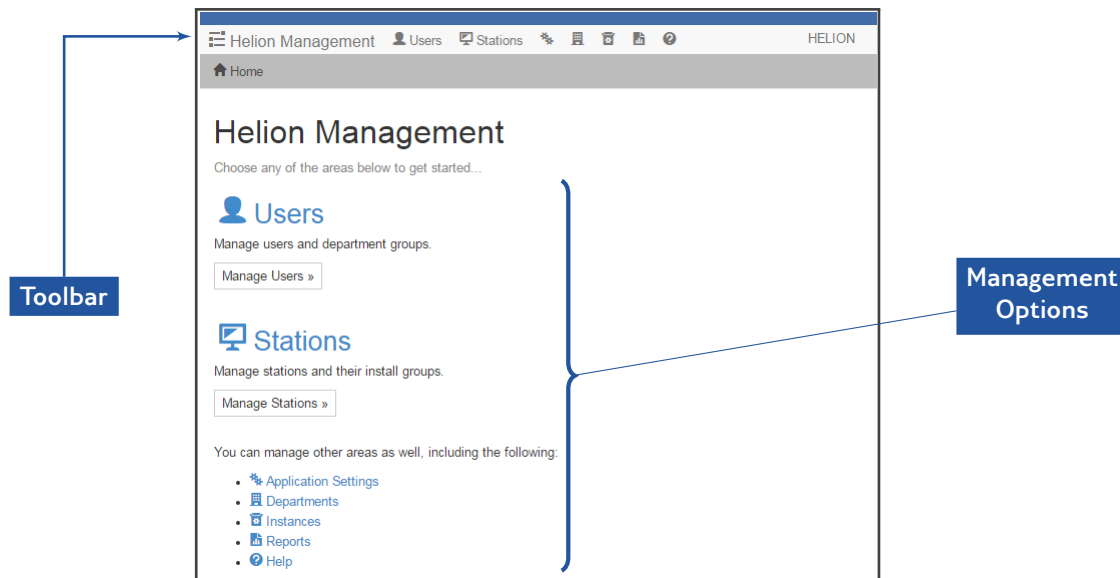






Figure 1 – Helion Management Home Page

Tools for managing users, stations, departments, instances and reports can be accessed from the toolbar or from the management options listed on the home page.

Common Features

Expand and Collapse

Throughout the application, content that can expand or collapse is marked with  or .

- To expand content, click 
- To collapse content, click 

Save Button



The save icon appears in the upper left portion of the page when an item can be saved. You can use this icon or the text button whenever you are directed to click **Save**.

Auditing

Auditing is available for a number of items maintained by Helion Management and includes details about when changes occurred and what was changed. Auditing is available for the following elements:

- Users
- Groups
- Stations
- Departments

Users

The Users page, shown in Figure 2, contains tools for managing users and groups.

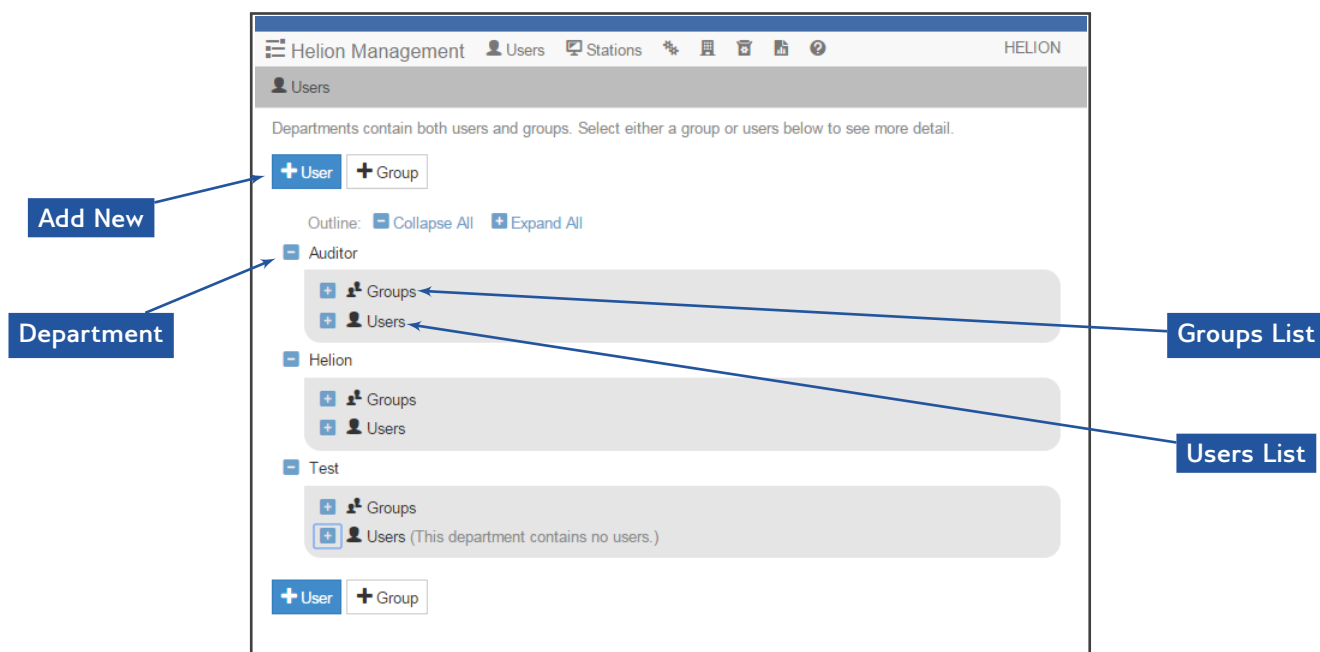


Figure 2 – Users Page

Expanded Users and Groups lists are shown in Figure 3.

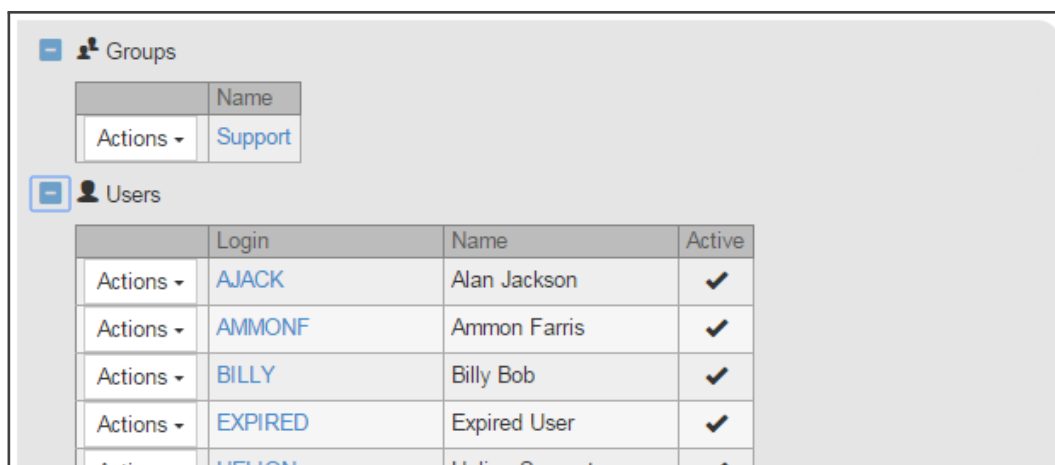


Figure 3 – Expanded Users and Groups Lists

The Groups list displays the name and an action menu for each group in the department. The Users list displays the login, name, active flag, and an action menu for each user in the department.

Groups

Users can be organized into a group to quickly give them all the permissions assigned to that group.

Click [+ Group](#) to create a new group.

The New Group page will open, as shown in Figure 4.

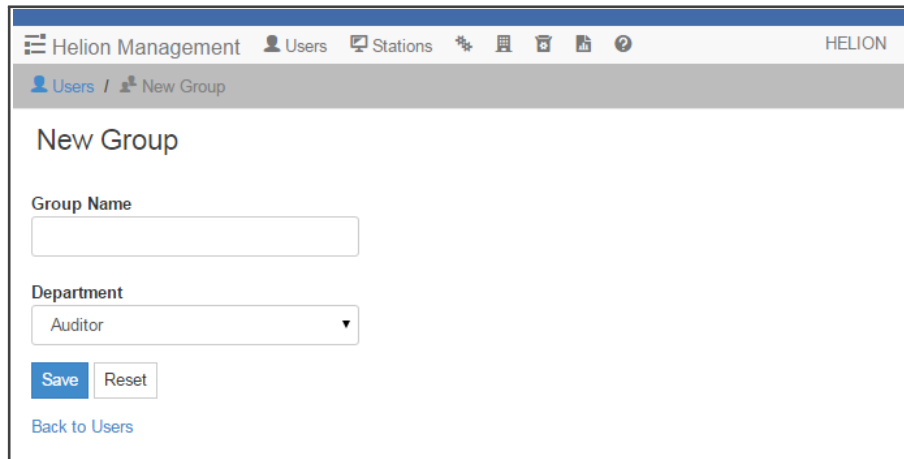


Figure 4 – New Group Page

Enter a Group Name and select a Department. The first department in the list will be selected by default. Click Save to make the changes permanent, or click Reset to clear the changes and reload.

Options for managing Groups can be accessed from the Actions Menu on the Users page, as shown in Figure 5.

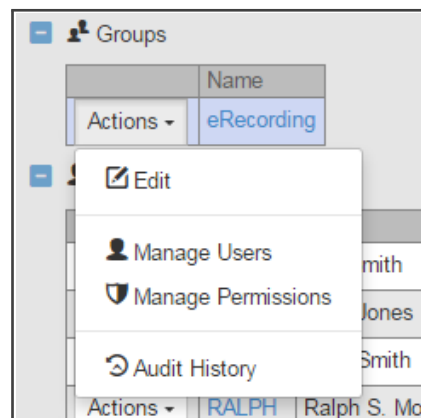


Figure 5 – Group Actions Menu

The following options are available from the Actions Menu:

- Edit
- Manage Users
- Manage Permissions
- Audit History

Edit (Group)

The Edit Group page, shown in Figure 6, contains controls for changing the group's name and the assigned department. To delete the group, click **Delete**.

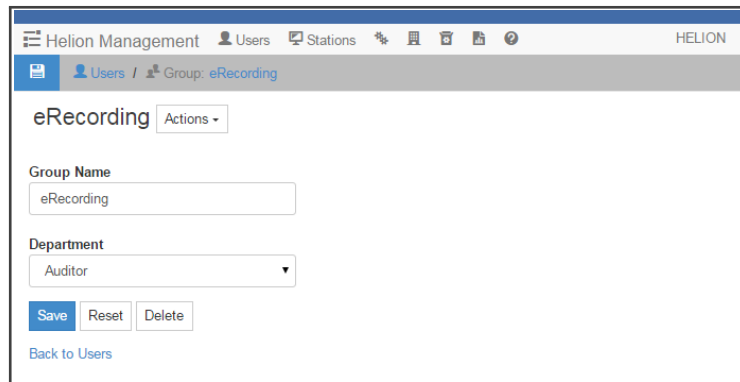


Figure 6 – Edit Group Page

Groups can also be edited by clicking their name in the Groups list.

Manage Users

The Manage Users page is shown in Figure 7.

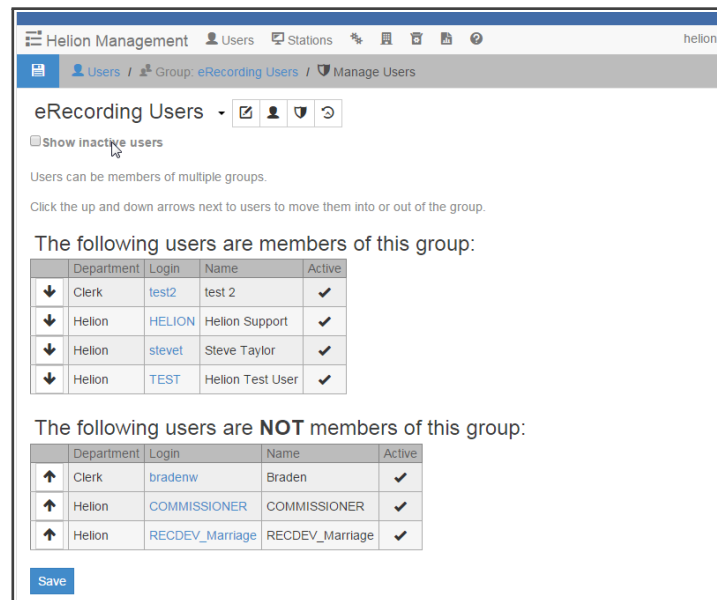




Figure 7 – Manage Users Page

The Manage Users page contains two lists of users: members of the group and non-members. To change group membership:

- Click  next to a user in the list on non-members to add a user.
- Click  next to a user in the list of members to remove a user.

Click **Save** to make the changes permanent.

To edit a user, click the user's **Login**.

Manage Permissions

The Manage Permissions page is shown in Figure 8.

The screenshot shows the Helion Management interface for the 'eRecording' group. The page title is 'eRecording' with an 'Actions' dropdown. Below the title, a note states: 'The permissions specified below will apply to all users in the group by default. These permissions can be denied by other groups or controlled specifically for individual users.' There are buttons for 'Collapse All' and 'Expand All'. The main section is titled 'Certified Copies (Common)' and contains a 'Grant All' button. Below this is a table with columns: Result, Group (Granted, Denied), Application, and Permission. The table shows two rows for 'Certified Copies': 'Access' (Granted) and 'Configuration' (Denied). A third section, 'Helion Admin', also has a 'Grant All' button and a table with columns: Result, Group (Granted, Denied), Application, and Permission. This table lists various permissions for 'Security Management', all of which are denied (marked with a red X).

Result	Group		Application	Permission
	Granted	Denied		
✓	✓	—	Certified Copies	Access
✗	—	✗	Certified Copies	Configuration

Result	Group		Application	Permission
	Granted	Denied		
✓	✓	—	Security Management	Administration
✗	—	—	Security Management	Create Or Modify Department
✗	—	—	Security Management	Create Or Modify Group
✗	—	—	Security Management	Create Or Modify User
✗	—	—	Security Management	Delete Department
✗	—	—	Security Management	Delete Group
✗	—	—	Security Management	Delete User
✗	—	—	Security Management	Enable/Disable User
✗	—	—	Security Management	Move User
✗	—	—	Security Management	Read
✗	—	—	Security Management	Rename Department

Figure 8 – Manage Permissions Page

The Manage Permissions page contains a list of permissions for each instance, organized by application.

To grant or deny permissions to the group, click ☐ in either the Granted or Denied column.

The resulting permissions are displayed in the Results column:

- ☒ for granted permissions.
- ☒ for denied permissions.

To grant the group all permissions for a particular application, click **Grant All**.

Remember to click **Save** to make the changes permanent.

Users

A user has login credentials and a set of Helion Management roles. Users can be assigned permissions individually or can inherit permissions from a group.

Click [+ User](#) to create a new user.

The New User page will open, as shown in Figure 9.

Helion Management Users Stations

HELION

Users / New User

New User

Login

Display Name

Department Auditor ▼

Comments

Disabled ☐

Expiration Date

Authentication ☐ Use Active Directory

A password and matching confirmation are required for new users.

Password

Confirm Password

Management Roles ☐ Can use Helion Management

[Save](#) [Reset](#)

Figure 9 – New User Page

Controls for editing a new user are described in Table 1.

Control	Description
Login	The login name used when entering credentials.
Display Name	The user's full name.
Department	The user's assigned department.
Comments	Notes about the user.
Disabled	Sets the user's login as inactive when selected. The credentials of inactive users cannot be used to log in to Helion applications.
Expiration Date	Sets an expiration date for the user. The user will automatically appear as inactive on the expiration date.
Use Active Directory*	If selected, the user will use their network credentials to log in to Helion applications. A domain and network user name are required to use active directory authentication.
Password/Confirm Password	The user's password for logging in to Helion Applications.
Management Roles	If Can use Helion Management is selected, the user will be able to log in to and use the Helion Management application.

Table 1 – New User Controls

*Users with Use Active Directory selected will not be able to change their password from Helion Management or Helion applications.

Options for managing users can be accessed from the Actions Menu on the Users page, as shown in Figure 10.

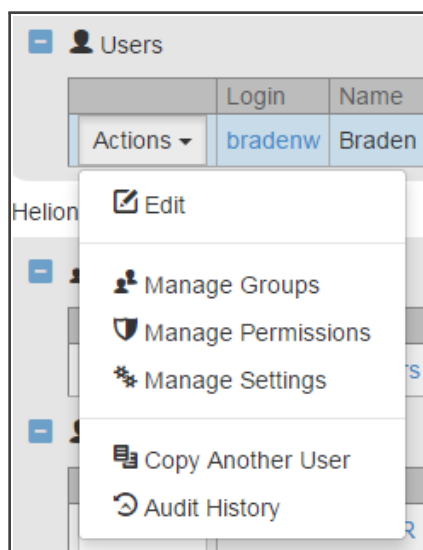


Figure 10 – User Actions Menu

The following options are available from the Actions Menu:

- Edit
- Manage Groups
- Manage Permissions
- Manage Settings
- Copy Another User
- Audit History

Edit (User)

The Edit User page contains controls identical to those for creating a new user. To change the user's password, enter a new Password in the Authentication section. After changes have been made to the user, click Save to make the changes permanent, or click Reset to clear the changes and reload.

Manage Groups

Users can be added and removed from groups by clicking Manage Groups to open the Group Membership page, shown in Figure 11.

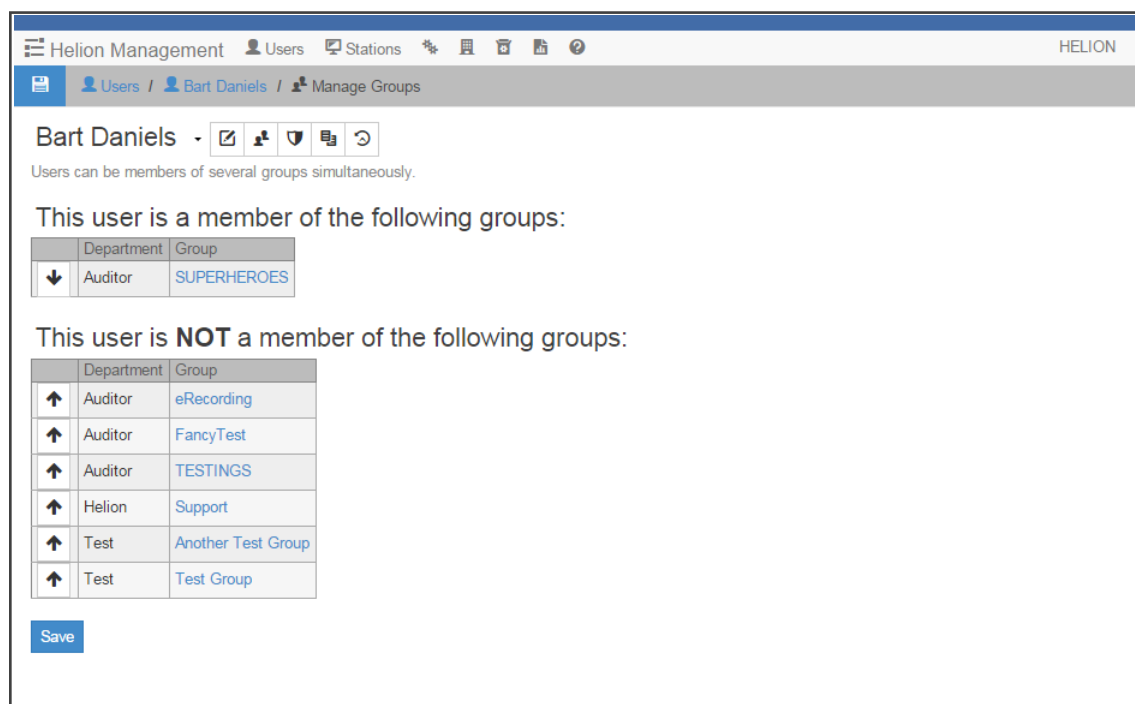




Figure 11 – Group Membership Page

The Manage Groups page lists both the groups where the user is a member and groups where they are not a member. To modify the user's group membership:

- Click  to add the user to a group.
- Click  to remove the user from a group.

Click Save to make the changes permanent.

Manage Permissions

The User Permissions page is shown in Figure 12

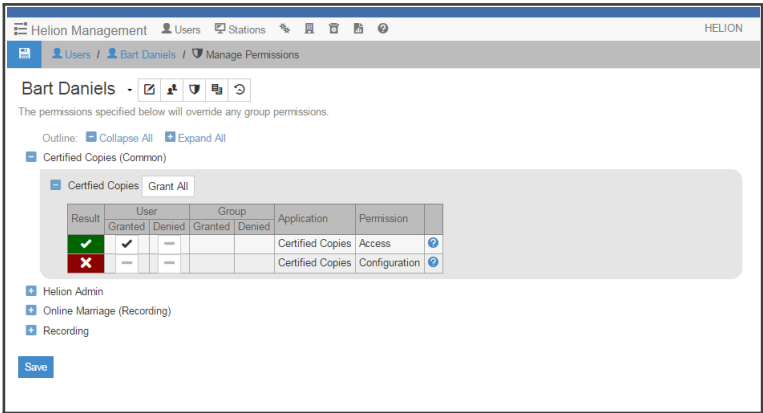


Figure 12 – User Permissions Page

The User Permissions page contains a list of permissions for each instance, organized by application.

To grant or deny permissions to the user, click ☐ in either the Granted or Denied column.

The resulting permissions are displayed in the Results column:

- ☒ for granted permissions.
- ☒ for denied permissions.

To grant the user all permissions for a particular application, click Grant All.

Permissions that are inherited from a group can be overridden at this page by explicitly denying or granting permissions to the user.

Remember to click Save to make the changes permanent.

Manage Settings

The Manage User Settings page contains user level settings for applications configured for use with Helion Management. This page is shown in Figure 13.

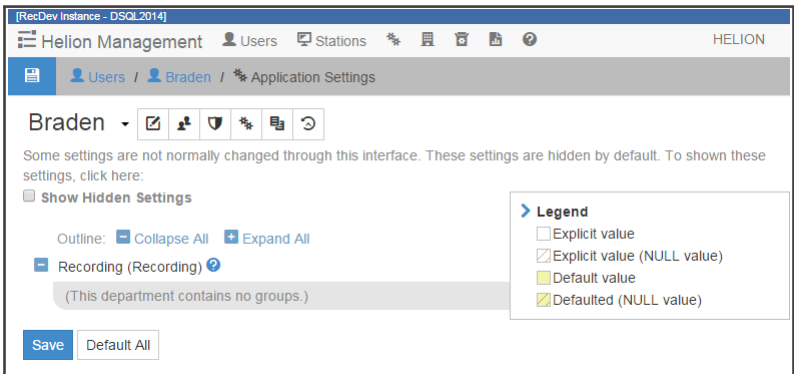


Figure 13 – Manage User Settings Page

For more information about the controls specific to the settings page, see the System Application Settings section of this document.

Copy Another User

Note: The permissions currently assigned to the user receiving the copied permissions will be removed.

The Copy Another User tool allows the permissions and group memberships from a user to be copied to another user. When Copy Another User is clicked, a list of users will appear, as shown in Figure 14.

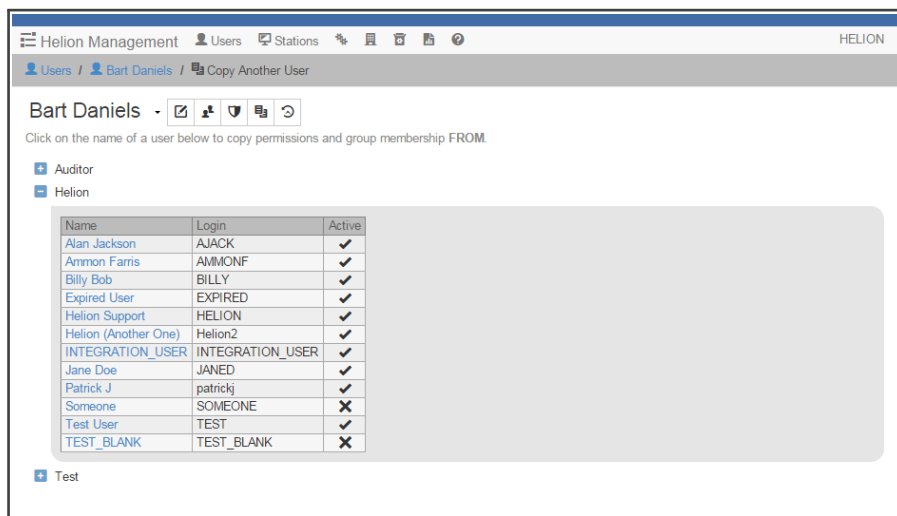


Figure 14 – Copy Users Page

To begin copying permissions from a user, select a user's Name from the list. A summary of the memberships and permissions that will be copied from the user will display, as shown in Figure 15.

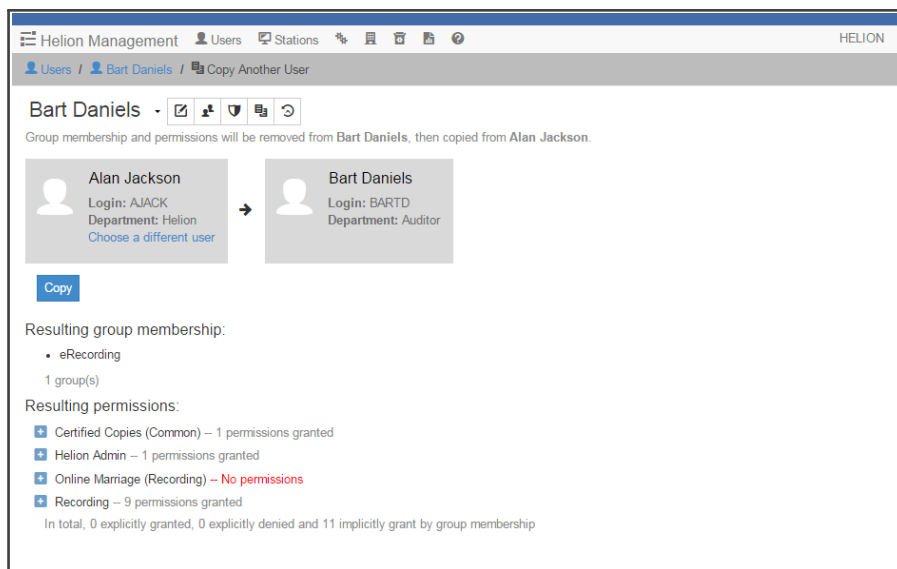


Figure 15 – Copy User Results Page

To copy permissions, click Copy.

Stations

The Stations page, shown in Figure 2, contains tools for stations.

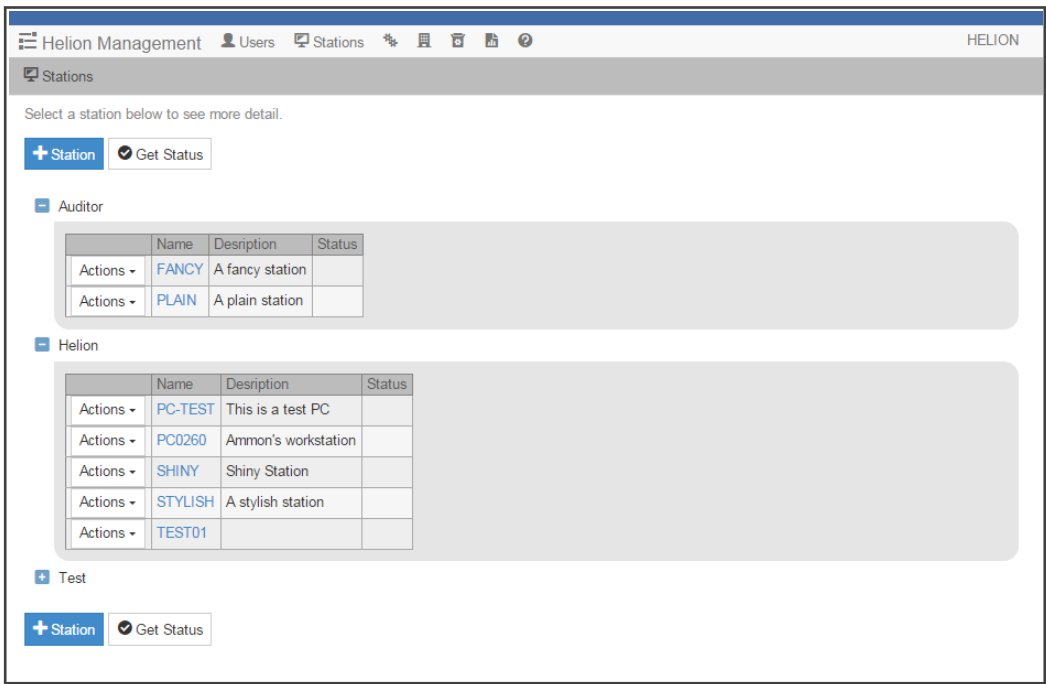


Figure 16 – Stations Page

Stations are organized by department. The station list displays a name, a description, a status, and an action menu for each station.

Click **+ Station** to add a new station.

To get the current status for a station, click **Get Status**. The status column will report if the station is up to date, out of date, or if the station has encountered an installation error.

Options for managing stations can be accessed from the Actions Menu, shown in Figure 17.

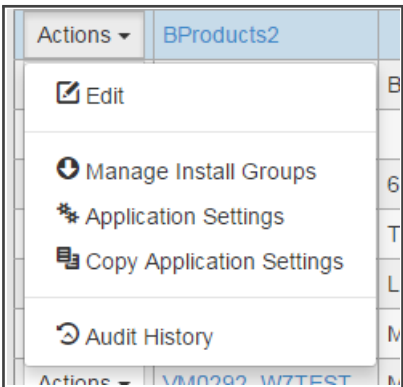


Figure 17 – Station Actions Menu

The following options are available from the Actions Menu:

- Edit
- Manage Install Groups
- Application Settings
- Copy Application Settings
- Audit History

Edit (Station)

The Edit Station page is shown in Figure 18.

The screenshot shows the 'Edit Station' page in the Helion Management application. The browser title is '[RecDev Instance - DSQL2014]'. The application header includes 'Helion Management' and navigation links for 'Users', 'Stations', and other icons. The breadcrumb trail is 'Stations / PC0388'. The main content area has a title 'PC0388' with a dropdown arrow and several action icons. Below this are four form fields: 'Station Key' with the value 'PC0388', 'Description' with the value 'Bryce Dev', 'Settings Group' with the value 'x64', and 'Department' with a dropdown menu showing 'Clerk'. At the bottom of the form are three buttons: 'Save' (highlighted in blue), 'Reset', and 'Delete'.

Figure 18 – Edit Station Page

Control	Description
Station Key	This value is usually set to the computer name.
Description	A description of the station.
Settings Group	This value usually matches the station's operating system version and architecture.
Department	The station's Helion Management department.

Table 2 – New/Edit Station Controls

To save the changes to a station, click **Save**. To reset the station to its original values after making changes, click **Reset**. To delete the station, click **Delete**.

Note: Once the settings group has been saved, it cannot be modified.

Manage Install Groups

The Manage Install Groups page is shown in Figure 19.

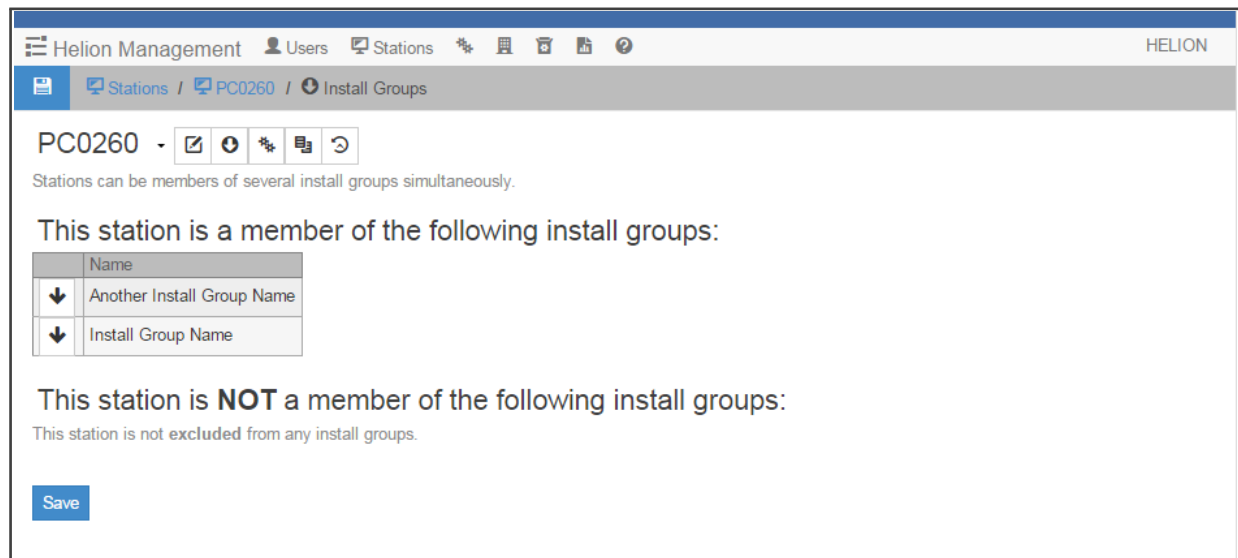




Figure 19 – Manage Install Groups Page

The Manage Install Groups page lists both the install groups where the station is a member and install groups where it is not a member.

To change station membership:

- Click  to add the station to an install group.
- Click  to remove the station from an install group.

Click **Save** to make the changes permanent.

Application Settings

The Station Application Settings page displays station level settings for applications configured for use with Helion Management. This page is shown in Figure 20.

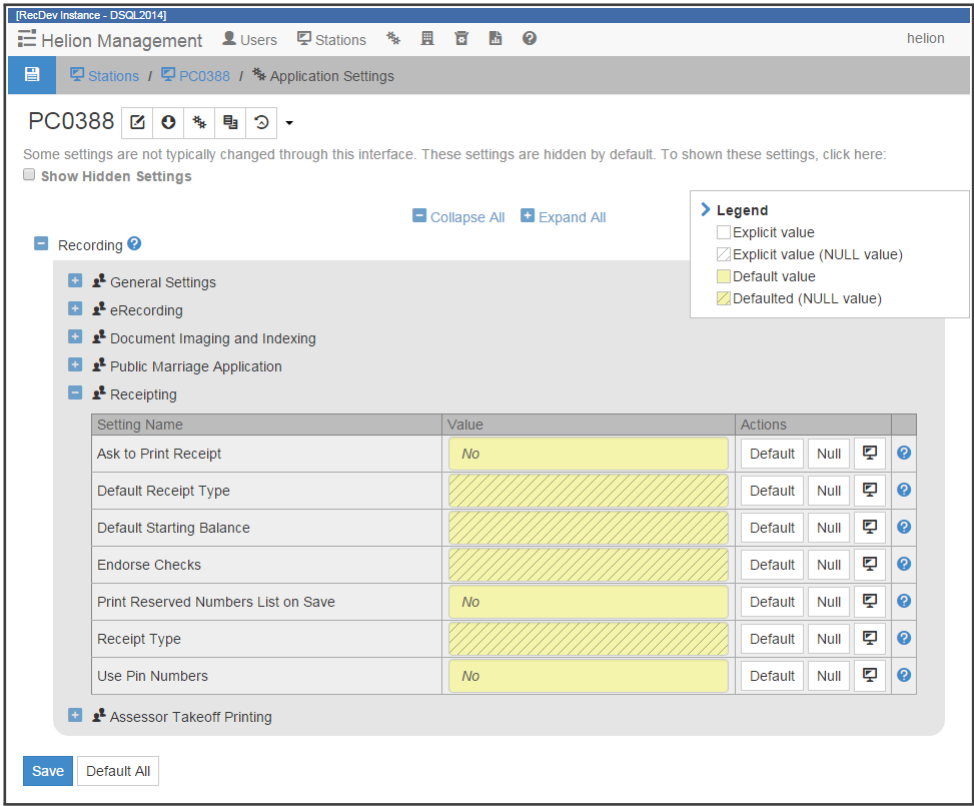


Figure 20 – Station Application Settings Page

For more information about the controls specific to the settings page, see the System Application Settings section of this document.

Copy Application Settings

Note: The settings currently assigned to the station receiving the copied settings will be removed.

The Copy Application Settings tool allows the application settings from a station to be copied to another station. When Copy Application Settings is clicked, a list of stations will appear, as shown in Figure 21.

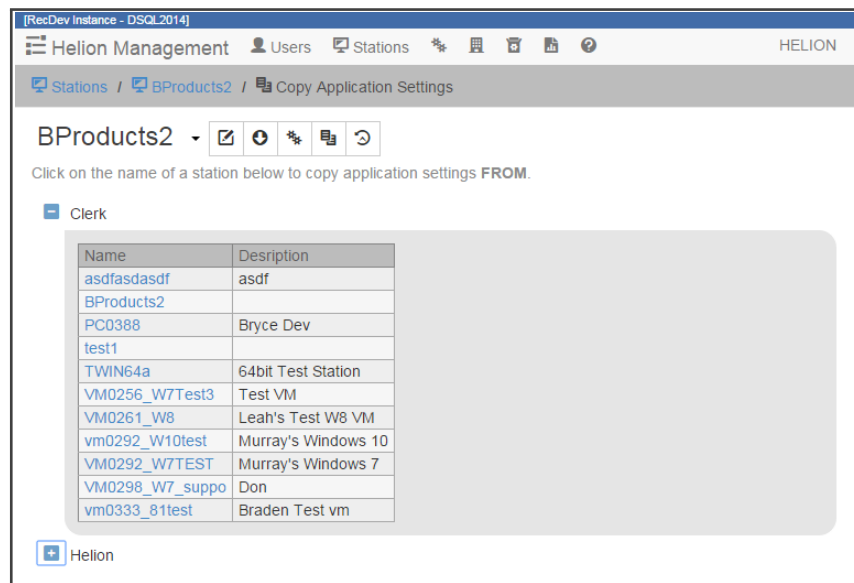


Figure 21 – Copy Application Settings Page

To begin copying settings from a station, select a station Name from the list. A summary of the settings that will be copied from the station will display under Resulting Station Application Settings, as shown in Figure 22.

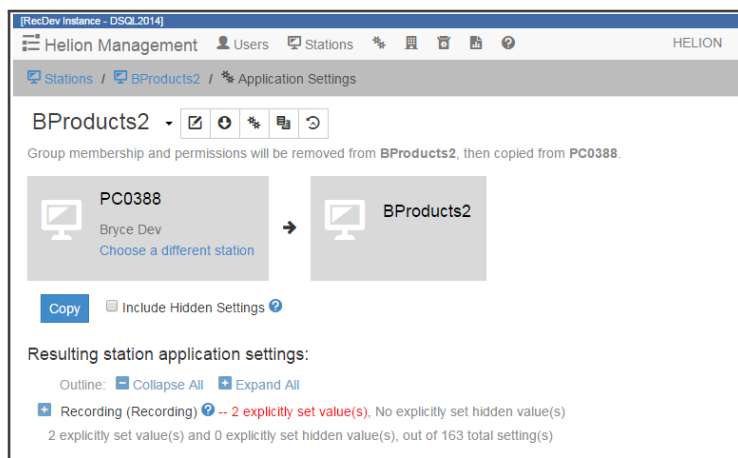


Figure 22 – Copy Settings Results Page

To copy settings, click Copy. To also copy hidden settings to the station, select Include Hidden Settings before clicking Copy.

Application Settings

The Application Settings page is shown in Figure 23.

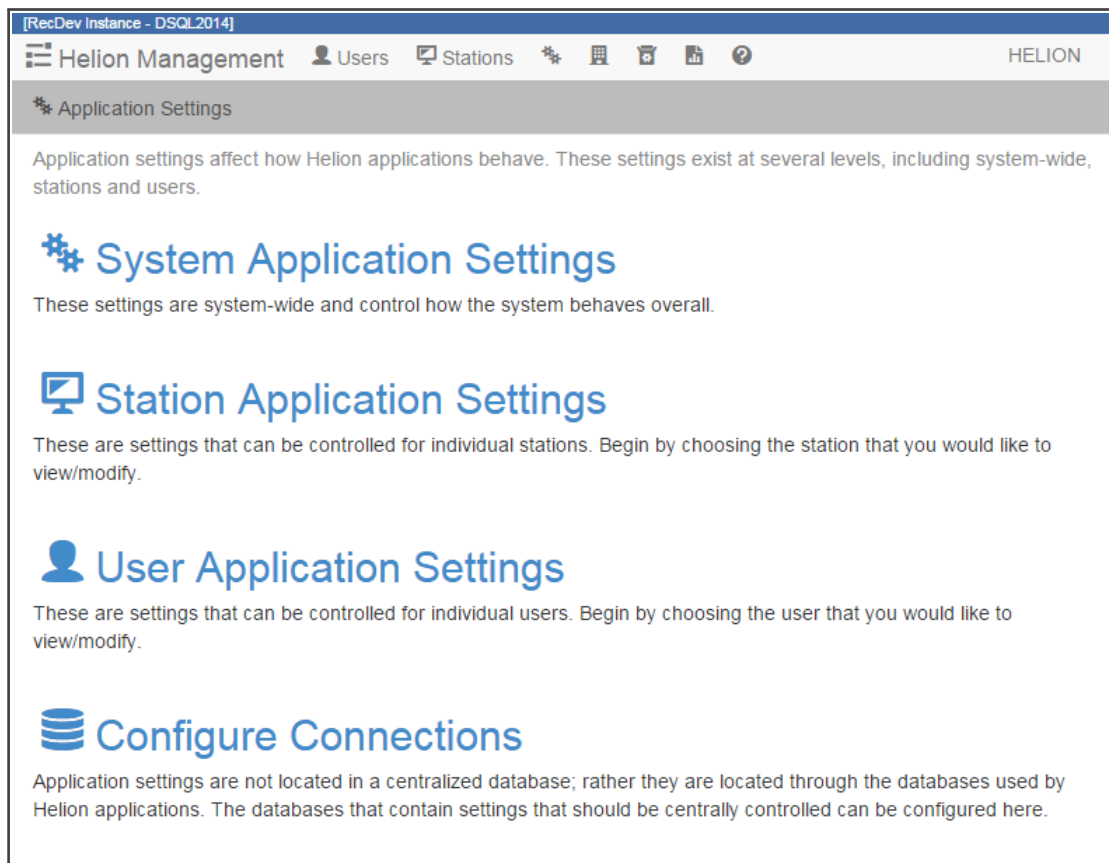


Figure 23 – Application Settings Page

The following options are available from the Application Settings page:

- System Application Settings
- Station Application Settings
- User Application Settings
- Configure Connections

System Application Settings

The System Applications Settings page is shown in Figure 24.

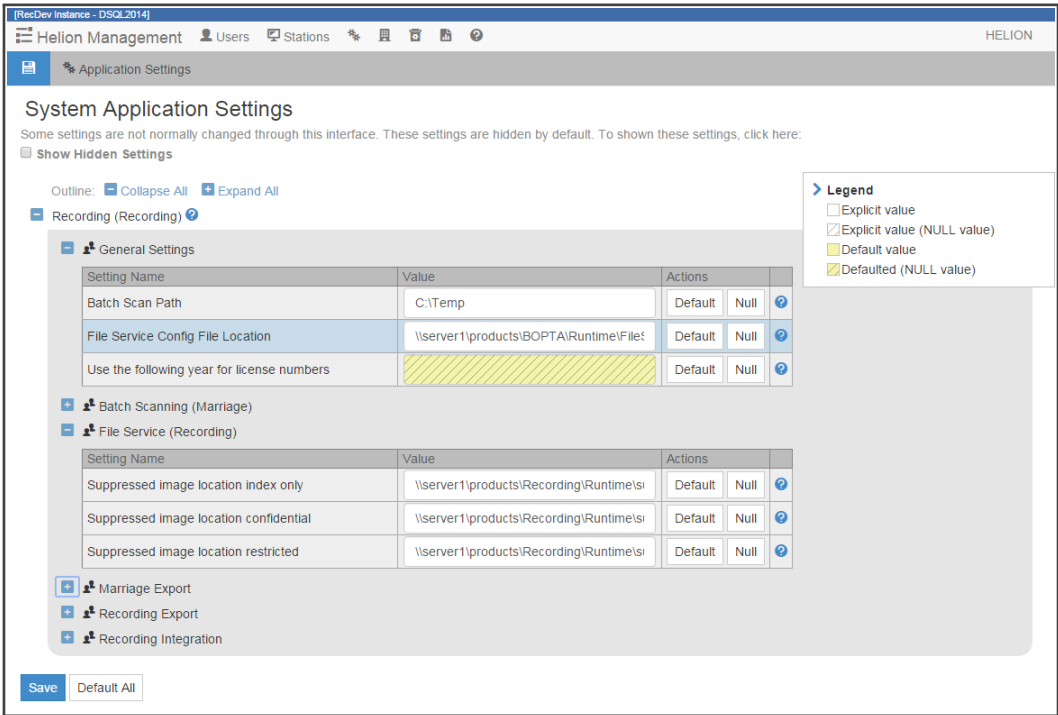


Figure 24 – System Application Settings Page

This page displays system level settings for applications configured for use with Helion Management. Settings are organized by suite and application. General Settings are base level settings that will affect multiple applications within the suite.

Setting controls are described in Table 3.


Control	Description
Setting Name	A short description of the setting
Value	The current value of the setting
Default	Reset the value of the setting to its default
Null	Sets the value of the setting to Null.
	Displays a short description of the setting's effect and default value when the mouse is hovered over the icon.

Table 3 – Setting Controls

Values are color coded to describe their current status. Color codes are described in in the Legend and in Table 4.





Control	Description
	Value was set by the user.
	Null value was set by the user.
	Value is set to the default.
	Value is set to the default, and the default is null value.

Table 4 - Value Legend

To set all values to default, click `Default All`. After making changes to the settings, click `Save` to make the changes permanent.

Note: Some settings are hidden by default. To display these settings, select `Show Hidden Settings`.

Station Application Settings

The Station Application Settings shortcut opens the Stations page. Application settings for stations are described in the Station Application Settings section of this document.

User Application Settings

The User Application Settings shortcut opens the Users page. Application settings for stations are described in the Users—Manage Settings section of this document.

Configure Connections

The settings displayed on this page are configured by Helion when applications are first installed and do not usually need to be changed after initial configuration. Please contact Helion Support regarding behaviors related to these settings.

Departments

Users and groups are organized into departments. Departments are listed and managed from the Departments page, shown in Figure 25.

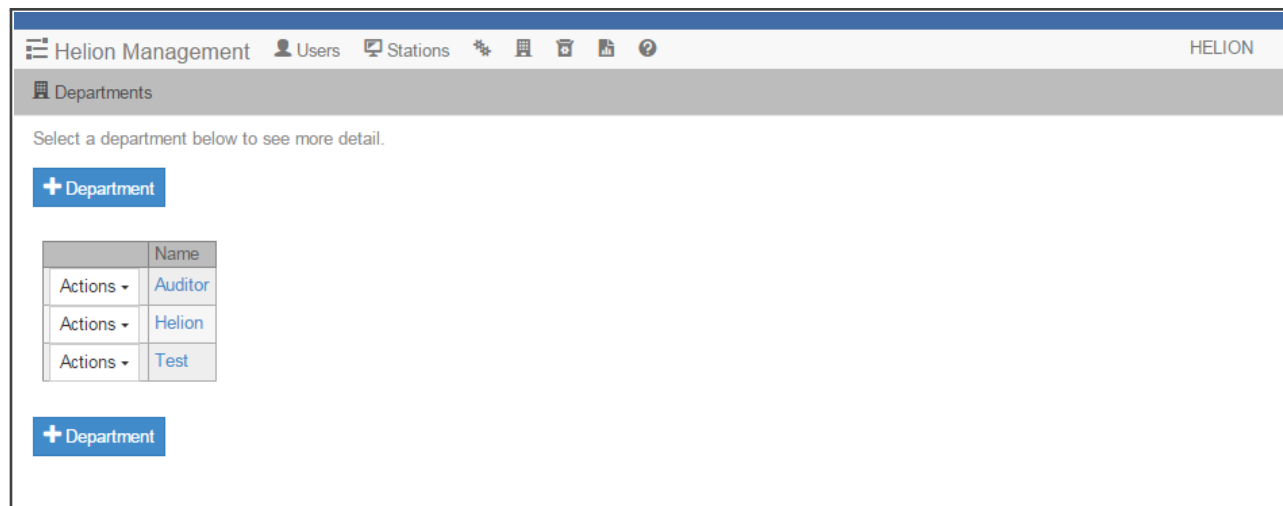


Figure 25 – Department Page

Click **+ Department** to create a new department.

Enter a Department Name and click Save to create a new department. Once a department is created, groups and users can be added to it.

Options for managing departments can be accessed from the Actions Menu, shown in Figure 26.

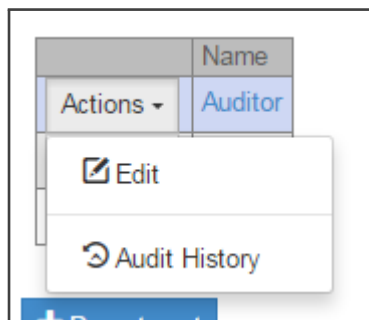


Figure 26 – Department Actions Menu

The following options are available from the Actions Menu:

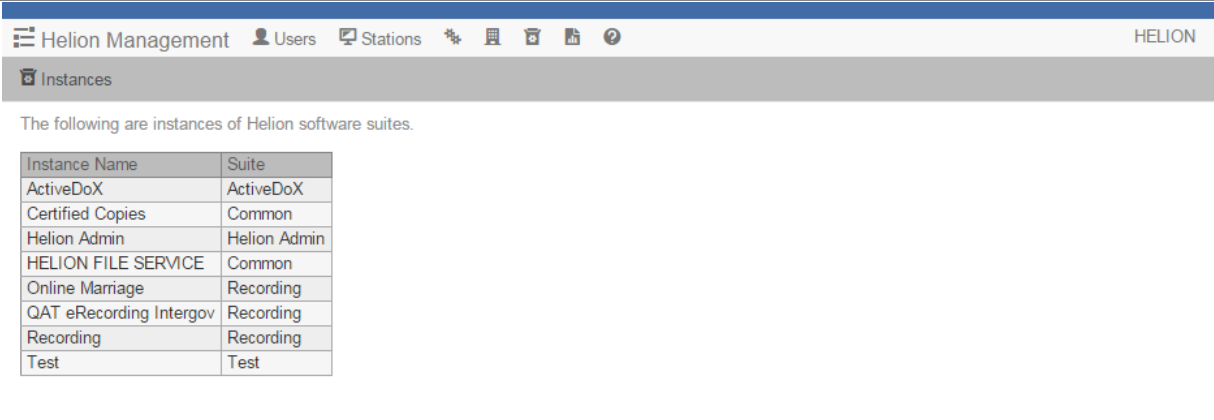
- Edit
- Audit History

Edit (Department)

To make the changes to the Department Name permanent, click Save. To reset the department to its original name after making a change, click Reset. To delete the department, click Delete.

Instances

The Instances page, shown in Figure 27, displays the Instance Name and Suite for each software instance in the Helion Management database.



Instance Name	Suite
ActiveDoX	ActiveDoX
Certified Copies	Common
Helion Admin	Helion Admin
HELION FILE SERVICE	Common
Online Marriage	Recording
QAT eRecording Intergov	Recording
Recording	Recording
Test	Test

Figure 27 – Instances Page

Reports

The Reports page lists reports available to the Helion Management application; those reports are described in Table 5.

Report	Description
Department List	Displays users and groups organized by department. Includes the name and ID of each group, as well as the ID, login, name and status of each user.
Station List	Displays stations organized by department. Includes the ID, name, and description of each station.
User List	Displays users organized by department. Includes the ID, login, name, and status of each user.

Table 5 – Available Reports

Help

The Help page contains links to resources related to Helion Management, such as this document.

To view technical information about the site, click [Site Information](#). The Site Information page contains version data and the database location for Helion Management. It also displays version information for Helion Common applications. Version information is organized by application.