

HEI User Authorization

ODHE Administrator User Manual

Version 1.3 – January 2020

HEI AUTHENTICATION
MANAGEMENT



System Access

Institutional Responsibilities

There is one designated HEI Institution Administrator/Liaison, Financial Aid Institution Administrator/Liaison, and OTC Attestor per institution. Additionally, there is a role called HEI Auth Institution User Audit that is the main point of contact for the semi-annual review and verification of users and roles. These individuals are responsible for maintenance of their organization's accounts, user access, and roles. This includes reviewing existing security roles, adding new accounts, and updating existing roles, notifying ODHE about deleting old roles, and ensuring that users of HEI have the access they need to do their jobs and no more access than they need. Liaisons can add accounts for new staff members and grant appropriate access based on the duties the person will be undertaking in relation to HEI data review and submissions. These accounts go into 'pending' status and must be approved by an ODHE data or financial aid analyst. ODHE's approval review includes a check of the email address submitted to ensure that it is accurate and matches the directory information for the individual, when available.

If an HEI, Financial Aid Liaison, or OTC Attestor is changing roles or leaving the institution, an e-mail should be sent to the Director of Data Management and Analysis, Director of Financial Aid, or OTC Data Manager at ODHE as soon as possible with the following information:

1. Current liaison name and email address
2. Date account should be disabled
3. New liaison name, email address, and Title

ODHE staff will make the requested changes in a timely manner (within 7 business days of the request).

If an HEI user at your institution leaves their employment or changes job duties, the HEI Liaison, Financial Aid Liaison, or OTC Attestor should remove/update that HEI user's access within 2 days of the employment change. Additionally, the liaison/attestor should send an email notification to the ODHE program administrator with a request to disable the account.

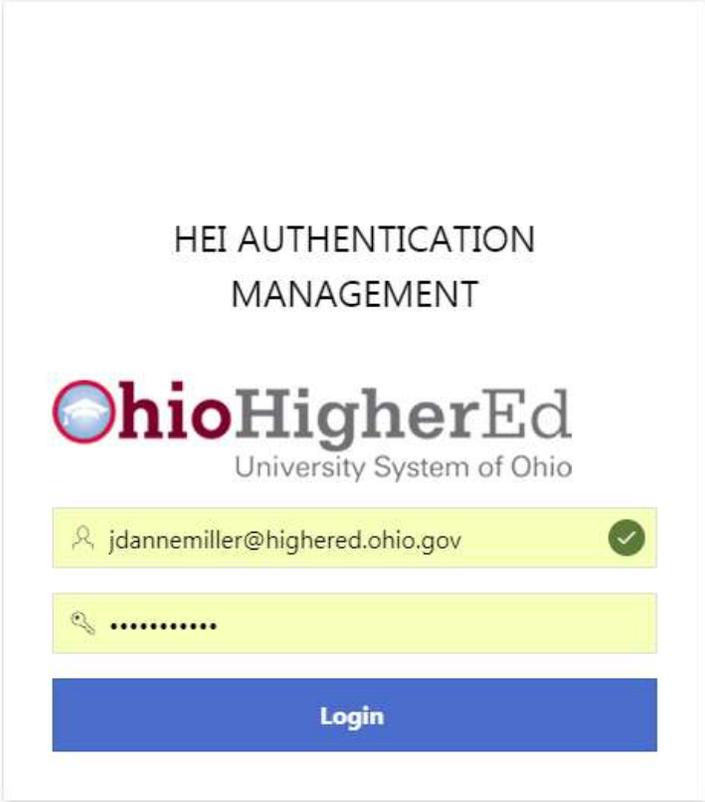
Semi-annually, the HEI Auth Institution User Audit at each institution will perform an account review and validation for all active users at that institution. The objective of this task is to review the institution's users, their assigned roles, and to verify that each user at the institution has the appropriate permissions in each HEI Application. For more detail, please see the section called **Semi-Annual Audit Review (page 10)**.

HEI Authorization Login

HEI Institution Administrator / Liaison and Financial Aid Institution Administrator / Liaisons have access to the HEI Authorization system that will assign permissions, user names, and passwords to various Department of Higher Education (DHE) Applications, like the HEI Core Portal and Financial Aid.

<https://heiauth.ohiohighered.org>

- Your username is the organization email address (@highered.ohio.gov, @oh-tech.org, etc...)
- Your password is the same as the one used for HEI Core Portal, CCP Portal, or several other websites that are new applications.



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OhioHigherEd
University System of Ohio

✓

Login

A successful login brings you to the administrator dashboard. Users without administrative privileges will see fewer links.

Accounts Reports Application Administration My Profile

Account Lookup [Add a New Account](#)

Search by Username

Quick Search Advanced Search

[Search](#) [Start a New Search](#)

Account management

Account Lookup

Account Lookup [Add a New Account](#)

Search by Username

Quick Search Advanced Search

[Search](#) [Start a New Search](#)

Edit	Username	Name	Institution	Phone Number	Extension	Account Status
	MSOTER@OH-TECH.ORG	Soter, Matt	Ohio State University-Main Campus	-	-	Approved
	MORWAY.3@OSU.EDU	Norway, Christofer M	Ohio State University-Main Campus	(614) 292-2552	-	Approved

Clicking **Search** without a username specified allows you to browse the complete user list at your institution. Selecting the **Advanced search** radio button adds searching options for the users' first and last names, institution, legacy username (from legacy applications now incorporated into HEI Auth), and can filter by account status (Approved, Disabled, Pending).

Search by Username

Quick Search Advanced Search

Advanced Search

First Name

Last Name

Legacy Username ?

Institution ^

Account Status Approved Disabled Pending ?

[Search](#) [Start a New Search](#)

Clicking the edit icon () for a user opens that user's account profile.

Managing an Existing Account

Manage Account Cancel Apply Changes

Account

- * **Institution**
- * **Account Status** Approved Disabled Pending
- * **Email Address (Username)**
- Authorization Form Received On

User Details

- * **First Name**
- Middle Name
- * **Last Name**
- Job Title
- Department
- Address Line 1
- Address Line 2
- City

Below the User Details are the User Roles. This is where applications and the roles belonging to the individual are assigned. Administrative users will only see Applications listed for which they assigned that Application's "User Administrator" role.

User Roles

Applications

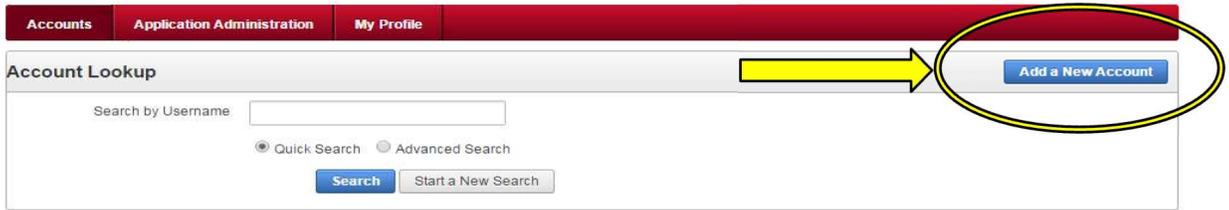
- ABLElink
- ATC
- Action Fund
- CCP
- CEMS
- COF
- Capital Planning
- HEI Auth
- HEI Portal
- MRS
- OTC

Account Details

- Date Entered: 07/07/2015
- Who Entered: MSOTER@OH-TECH.ORG
- Date Updated: 08/06/2015
- Who Updated: IDM_HEI

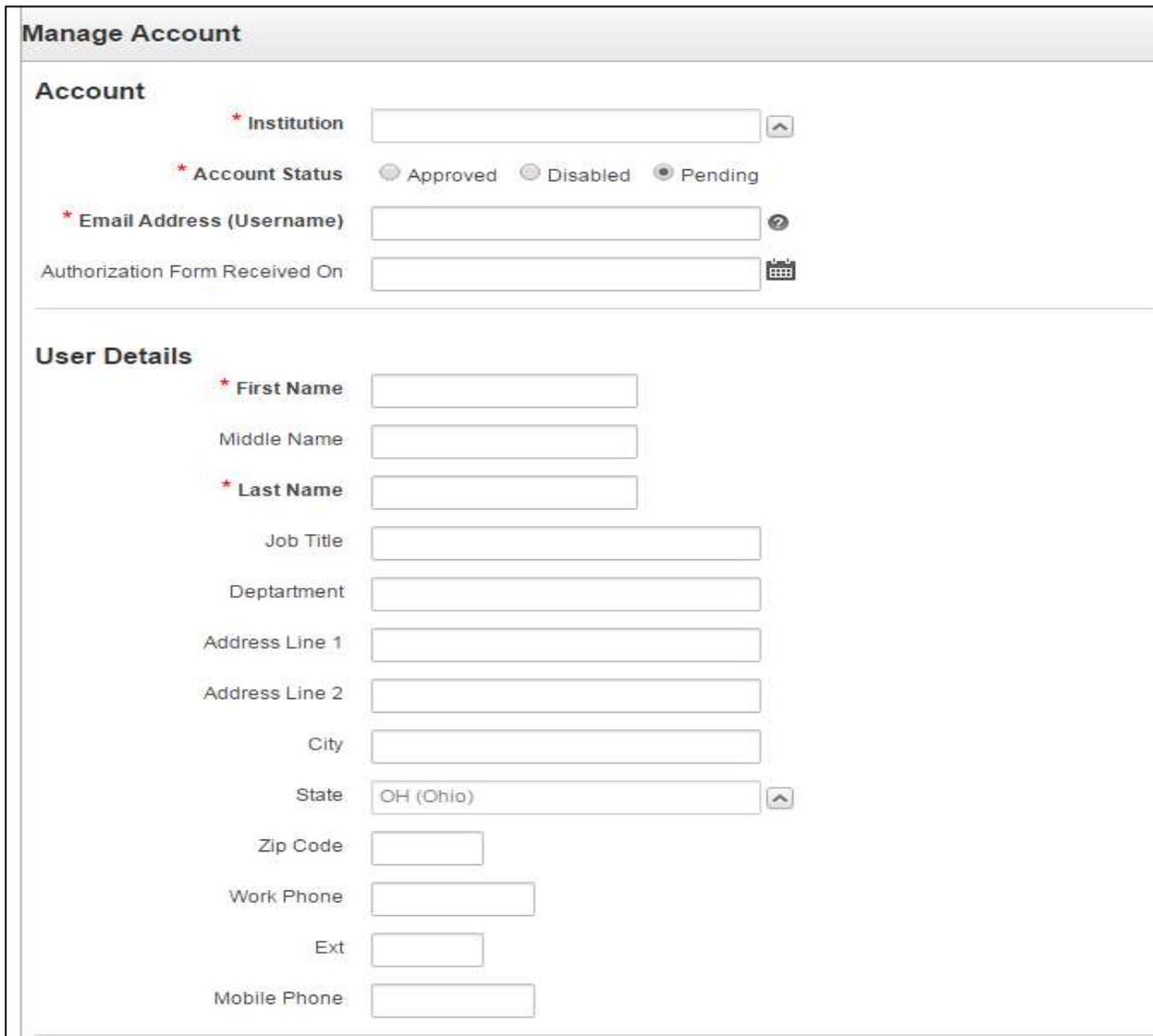
To Create Accounts for New Users

- Go to the Add a New Account button:



The screenshot shows a web interface with a red navigation bar at the top containing 'Accounts', 'Application Administration', and 'My Profile'. Below the navigation bar is a section titled 'Account Lookup'. This section includes a search input field labeled 'Search by Username', radio buttons for 'Quick Search' and 'Advanced Search', and two buttons: 'Search' and 'Start a New Search'. A yellow arrow points from the 'Search' button to a blue button labeled 'Add a New Account' located in the top right corner of the 'Account Lookup' section. The 'Add a New Account' button is circled in yellow.

- Complete the form – notes are below:



The screenshot shows a 'Manage Account' form. It is divided into two main sections: 'Account' and 'User Details'.
Account Section:

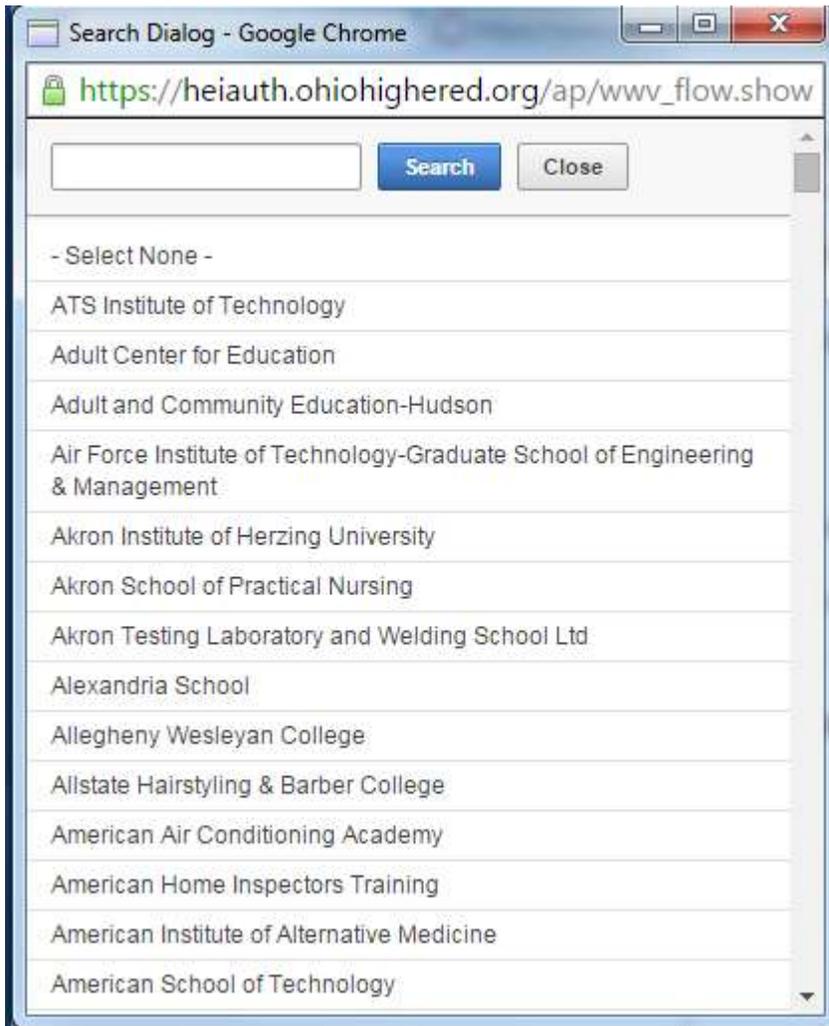
- * Institution:** A text input field with a dropdown arrow.
- * Account Status:** Radio buttons for 'Approved', 'Disabled', and 'Pending'. 'Pending' is selected.
- * Email Address (Username):** A text input field with a help icon.
- Authorization Form Received On:** A date input field with a calendar icon.

User Details Section:

- * First Name:** A text input field.
- Middle Name:** A text input field.
- * Last Name:** A text input field.
- Job Title:** A text input field.
- Department:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu with 'OH (Ohio)' selected and a dropdown arrow.
- Zip Code:** A text input field.
- Work Phone:** A text input field.
- Ext:** A text input field.
- Mobile Phone:** A text input field.

- Official university/college/district email addresses should be used for accounts/usernames (as opposed to personal email accounts).

- To look up an institution name, use the “up arrow” to open the search dialog:



Assigning Application Roles

Checking the box for an Application on the left column adds all that Application's Roles to the right column. In the example below, all of the HEI Portal roles are listed. At least one must be selected for the user's account to be associated with the HEI Portal Application.

Applications

- ABLElink
- ATC
- Action Fund**
- CCP**
- CEMS
- COF**
- Capital Planning**
- HEI Auth**
- HEI Fin Aid Portal
- HEI Portal**



Assign the appropriate roles to the individual based their data reporting duties. Examples are below.

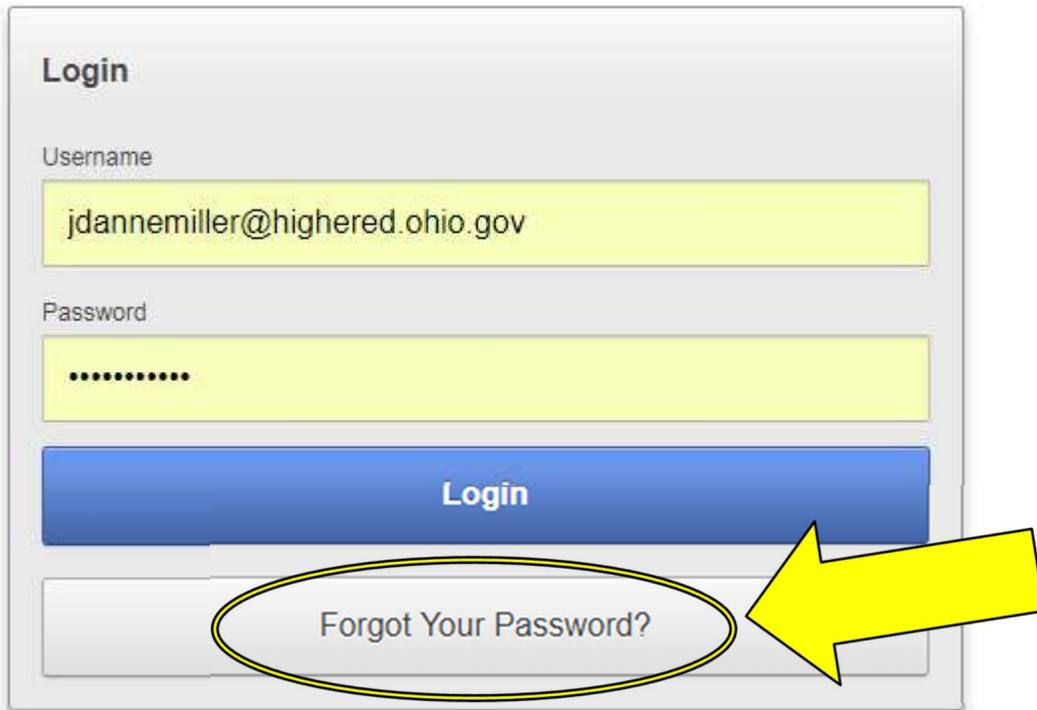
- HEI Portal - Academic Programs Data Reporter
- HEI Portal - Distance Learning Data Reporter
- HEI Portal - Distance Learning Program Administrator
- HEI Portal - Enrollment Data Reporter
- HEI Portal - Facilities Data Reporter
- HEI Portal - Faculty/Staff Data Reporter
- HEI Portal - FinAid NEALP Data Reporter
- HEI Portal - FinAid OCOG Data Reporter
- HEI Portal - FinAid WOS Data Reporter
- HEI Portal - Finance Data Reporter

Clicking the **Apply Changes** button saves the user's profile.

Unchecking an Application also removes all of its associated Roles when the profile is saved.

Re-setting or Forgotten Passwords:

- Each HEIAUTH-managed application will contain a “Forgot Password” link on the login page, which will direct the user to the HEIAUTH “Forgot Password” page, which will in turn generate an email with a secure link to reset the password



The image shows a login form titled "Login". It has two input fields: "Username" with the value "jdannemiller@highered.ohio.gov" and "Password" with masked characters. Below the fields is a blue "Login" button. At the bottom of the form is a link labeled "Forgot Your Password?". A yellow arrow points to this link, which is also circled in yellow.

- Passwords will expire every 90 days
- Automated emails will be sent out informing users of upcoming password expirations every 30, 15, 4, 3, 2 and 1 days before the password is to expire
- Upon expiration of a password, accounts will be locked until the user selects the “Forgot Password” option on any application login page and resets their password

Users who forgot their password or if the initial password has expired:

The easiest way is to get a new temporary password by going to the [application] main page:

<https://hei.ohiohighered.org>

➔ then click the ‘forgot your password’ link on the main page **or** go directly to:

https://heiauth.ohiohighered.org/ap/FORGOT_PASSWORD

From this point, the user enters their email address and then should get a new ‘reset password’ email in their inbox.

The system generates an email that comes from 'heiauth-admin@highered.ohio.gov'.

If the email is not reaching the requester, the IT staff may need to add it to their safe/known sender list, which might help if it is actually a SPAM filtering issue.

Semi-Annual Audit Review

Semi-annually, beginning in January 2020, the HEI Auth Institution User Audit at each institution will perform an account review and validation for all active users at that institution. The objective of this task is to review the institution's users, their assigned roles, and to verify that each user at the institution has the appropriate permissions in each HEI Application.

This report will list active users for all applications managed by the HEI Auth system, along with the assigned role. Every 6 months (January and July), the HEI Liaison/Financial Aid Liaison, and DHE Vice Chancellor of Finance will have to affirm access for all users within 30 days (Liaisons will review accounts at their institution, the Vice Chancellor will review DHE accounts). Any users not affirmed will have their access disabled.

For External Users (Institutions):

- A list of active users per institution will be populated every 180 days beginning in January 2020.
- Review will be done by a new role; an institutional role to review accounts across all applications at each institution.
- Each institution will have at least one person with the role: HEI Auth Institution User Audit. HEI Liaisons/Financial Aid Liaisons and OTC Attestors are automatically assigned this role.
- The reviewer will be able to confirm a user active or inactive.
- Institutional Reviewer will need to select confirm or disable in the system individually for each user.
- Review list will only contain users at that institution.
- Email reminders will be sent to Institutional Reviewer 30, 15, 10, 5, 3, 1 days before the date when not reviewed accounts become inactive.
- Accounts not confirmed in the window (30 days) will automatically become inactive.
- End users that will become inactive will receive email reminders at the 10 day mark.

Instructions:

- The Report is found in HEI Auth application – Audit Review:

Pending Requests

Edit	Username	Full name	Inst name	Work phone	Work phone ext	Contact status name
	TEST@TEST.BB	test, test	Air Force Institute of Technology-Graduate School of Engineering & Management	-	-	Pending

- Select the ‘Confirm’ or ‘Disable’ button for each user. The application and roles are shown for each active user.
 - Select ‘CONFIRM’ if the applications and roles associated with that person are correct.
 - Select ‘DISABLE’ if the person is no longer employed at your institution or their job tasks no longer require access to all of HEI applications listed.
 - Select ‘CONFIRM’ if the person should still have access to at least one of the applications listed.
 - If a specific application should no longer be associated with that person’s account or the role needs to change, contact the Application User Administrator at your institution to update it.

Institution : ATS Institute of Technology								
Action	First Name	Last Name	Username ↑	List Of Apps	Date Entered	Who Entered	Date Upd	
<div style="display: flex; gap: 10px;"> CONFIRM DISABLE </div>				Application: 512 HEI Auth Roles: HEI Auth Institution User Audit Application: 520 HEI Portal Roles: FinAid NEALP Data Reporter FinAid WOS Data Reporter Institution FinAid Administrator / Liaison	01/07/2020	HEIAUTH	-	

Institution : Akron Institute of Herzing University								
Action	First Name	Last Name	Username	List Of Apps	Date Entered	Who Entered	Date Upd	
<div style="display: flex; gap: 10px;"> CONFIRM DISABLE </div>				Application: 512 HEI Auth Roles: HEI Auth Institution User Audit Application: 517 HEIFX Roles: HEIFX User Application: 520 HEI Portal Roles: FinAid NEALP Data Reporter FinAid OCOG Data Reporter FinAid WOS Data Reporter	01/07/2020	HEIAUTH	-	

Institution : ATS Institute of Technology							
Action	First Name	Last Name	Username ↑	Applications / Roles		Reviewed Date	
Not Reviewed	John	Smith	JSMITH@EXAMPLE.ORG	Application: 200 CEMS	Roles: CEMS Institution/Faculty User	-	-
				Application: ATC	Roles: ATC User		
Not Reviewed	Tony	Smith	TSMITH@EXAMPLE.ORG	Application:	Roles:	-	-
Institution : Adult and Community Education-Hudson							
Action	First Name	Last Name	Username	Applications / Roles		Reviewed Date	
Not Reviewed	abc	xyz	ABC@YAHOO.COM	Application: 507 OTC	Roles: OTC Attestor	-	-
Institution : Akron School of Practical Nursing							
Action	First Name	Last Name	Username	Applications / Roles		Reviewed Date	
Not Reviewed	[Redacted]			Application: 507 OTC	Roles: OTC User	-	-
Disabled	[Redacted]			Application: ABLElink	Roles: ABLElink Administrator	12/12/2019	M

- After the review is complete, an archived report will be available using ‘Audit Review History’ and selecting the year.

Select Audit Review Year

* Audit Review Year

Audit Reviews for 2020

View ↑	Audit Review Description	Start Date	End Date	Cancel Date	Date Entered	Who Entered	Date Updated	Who Updated
Q	January Audit Review	01/01/2020	02/15/2020	-	01/07/2020	HEIAUTH	-	-

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- Please send any questions to HEI Help: HEI_Help@highered.ohio.gov