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Higher Education Information (HEI) System

# HEI Liaison's Web User Administration Training Guide

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## Overview of Page Elements

**Select a Representative Drop-Down:** Contains a list of all approved HEI Web users for the Liaison's institution. Use this drop-down to select existing users to update their contact or authorization information. See pages [8 – 10](#) for more information.

**Clear Form to Add New Individual:** Select this button to clear the form when an existing individual's information is on screen.

**Delete Individual:** Select this button to delete an existing user from the "Select a Representative" drop-down. This action will delete the displayed user from the areas in which the Liaison has permission. See pages [11 – 12](#) for more information.

**First Name:** An existing user's first name will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter the new user's first name. Do not include title information. Ex: John

**Last Name:** An existing user's last name will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter the new user's last name. Do not include title information. Ex: Smith

**Title:** An existing user's title will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter the user's title. Ex: Research Specialist

**Address:** An existing user's address information will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter their address information. Information from the address field will only be used for mailings, therefore if the account holder has both a mailing address and a street address, enter only the former. Ex: 1234 Anywhere Place Columbus, OH 43215.

**Telephone:** An existing user's telephone number will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter their telephone number information. Ex: (123) 456-7890 ext 123

**Fax:** An existing user's fax number will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter their fax number information. Ex: (123) 456-7890 ext 123

**E-Mail:** An existing user's e-mail will display in this box when selected from the "Select a Representative" drop-down. Alternately, when adding a new user, enter their email address using lower-case characters. Ex: [someone@somewhere.edu](#)

### Type of HEI Web Account Authorizations Requested

**Data Reporter:** This box will be checked when an existing user has at least one data reporter permission. When updating an existing user's information, un-checking this box will remove *all* data reporter permissions. When adding a new user select this box to assign data reporter permissions on the next page by clicking "Continue to Page 2 to Submit". *Please note:* The "Data Reporter" box is grayed out for Capital Planning Liaisons.

**Restricted Outputs:** This box will be checked when an existing user has at least one restricted output permission. When updating an existing user's information, un-checking this box will remove *all* restricted output

permissions. When adding a new user select this box to assign data reporter permissions on the next page by clicking “Continue to Page 2 to Submit”.

**Continue to Page 2 to Submit:** This button is used to advance to the second page where Liaisons will modify data reporter and restricted output permissions. When updating contact information it is still necessary to continue to Page 2 to submit the changes made. This button also serves as a check-point to evaluate the data that has been entered on screen. For example, if all of the required fields did not contain data an error message would result after clicking the button.

**Help:** Clicking the Help button will display this document in PDF format.



Page 2 displays after “Continue to Page 2 to Submit” button is clicked:

**Data Reporter/Restricted Output Access Authorizations**

Use this page to select data reporter submission and restricted outputs authorizations. Check submission or restricted outputs to authorize.

Select Data Reporter Authorizations for:  
John Smith

**Data Areas/Submissions**

ACAD_PGRM	ENROLLMENT
<input type="checkbox"/> AP, Academic Programs	<input type="checkbox"/> AB, Adult Basic and Literacy Education
	<input type="checkbox"/> AC, Alternative Credit
	<input type="checkbox"/> AE, Aggregated Enrollment
	<input type="checkbox"/> AN, Ohio Articulation Number File
	<input type="checkbox"/> AW, Adult Workforce Education
	<input type="checkbox"/> CI, Course Inventory
	<input type="checkbox"/> CN, Course Enrollment
	<input type="checkbox"/> CT, Cohort Tracking
	<input type="checkbox"/> DC, Degree/Certificate Earned
	<input type="checkbox"/> DO, Distance Learning Course Offerings
	<input type="checkbox"/> DS, Distance Learning Course Section File
	<input type="checkbox"/> EP, Extended Baccalaureate Programs
	<input type="checkbox"/> ES, Extended Baccalaureate Students
	<input type="checkbox"/> FE, Freshmen Remedial Enrollment
	<input type="checkbox"/> FS, Flexibly Scheduled Course Sections
	<input type="checkbox"/> GE, Grade Explanation
	<input type="checkbox"/> GP, Graduate and Professional Admissions
	<input type="checkbox"/> HG, High School of Graduation
	<input type="checkbox"/> IC, Identifier Change
	<input type="checkbox"/> ME, Medical Enrollment

Once all error checks have passed from the first screen, the 2<sup>nd</sup> screen will be displayed. The contents of page 2 are determined by the “Type of HEI Web Account Authorizations Requested” selections made. For example, if both the “Data Reporter” and “Restricted Outputs” boxes were checked on page 1, then the detail level of both categories will be displayed.

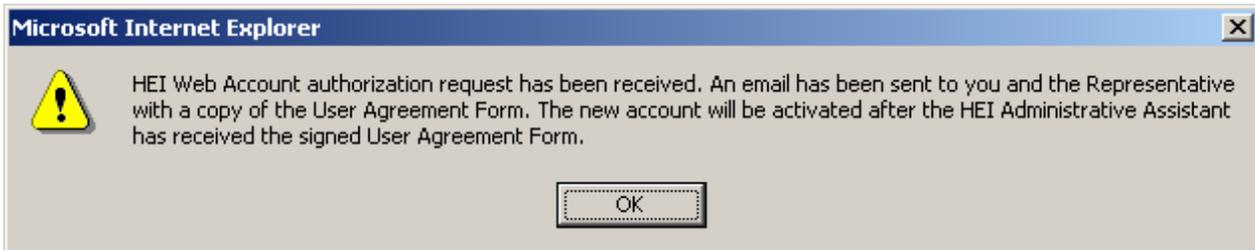
*It is important to note that each type of Liaison (Regular, Financial-Aid, Capital Planning) will have different submissions and/or restricted query outputs for screen 2. For example, a Financial-Aid Contact will not be able to assign the same permissions as a regular Liaison, and vice-versa. However, a regular Liaison can assign permissions to a user that was originally entered under the Financial-Aid Contact’s domain.*

*Please Note:* As of July 2005, Capital Planning Liaisons can only assign restricted output permissions.

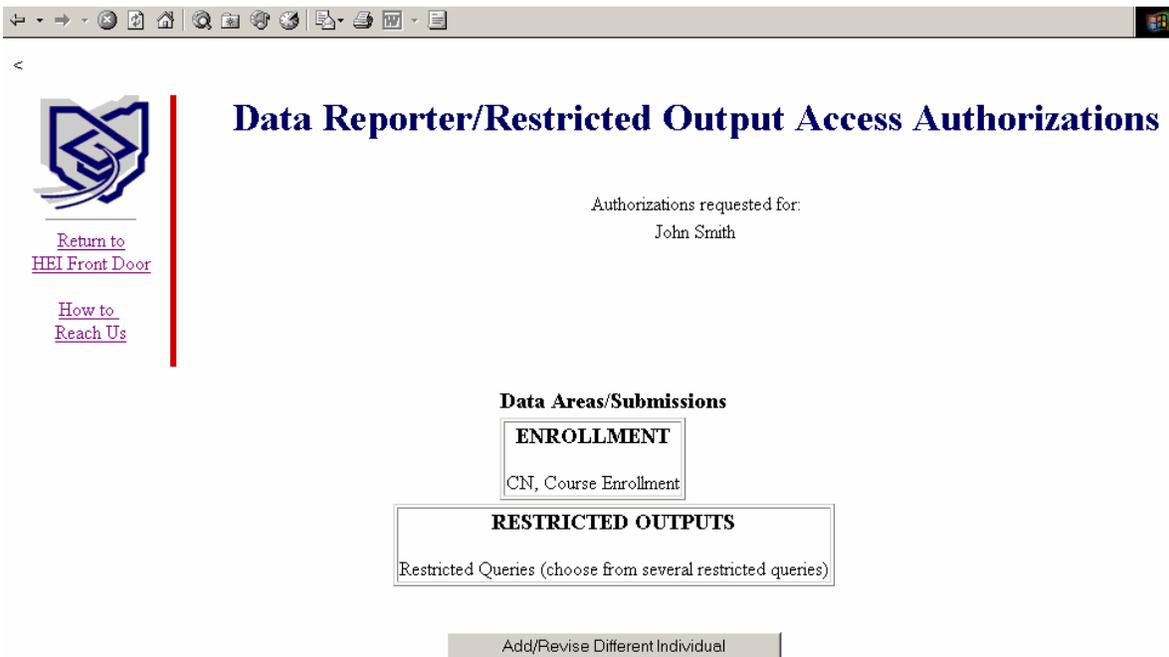
**TC Submission Note:** The Tech Prep Consortium Tracking (TC) submission, is a unique submission since it relies on the assignment of a consortium code. Institutions that have an assigned consortium code will find the TC submission listed on Page 2. Additionally, if more than one consortium code is assigned to an institution then a hyperlink will appear next to the TC submission, entitled “Assign Consortia”. Liaisons should click this link to assign one or more of the consortium codes to the user.

Once the desired permissions have been assigned, scroll to the bottom of the screen and click the “Submit Authorizations” button.

When all of the new user information has been entered correctly and submitted the following message will display:



After clicking “OK” the summary screen that outlines the authorizations assigned will display.



After the summary screen is displayed an email will be sent to the new user (to the e-mail address just provided) and carbon copied to the Liaison who added the user. The e-mail contains instructions for the new user on how to activate their account. It is important to note that the new user’s account will not be activated until approximately 1 business day after they have signed and faxed the authorization form to HEI.

*Please Note:* User’s information cannot be modified by the Liaison until they have been approved by the HEI administrative assistant.

Once the authorization form is received, and the user is activated by the HEI administrative assistant, another email will be sent with instructions for them to call HEI in order to obtain their password.

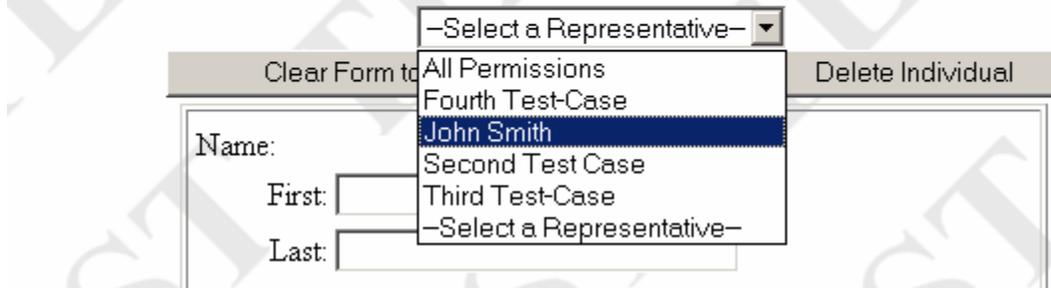
Finally, select the “Add/Revise Different Individual” button to return to the main Liaison’s administration screen.

## Update an Existing User's Information

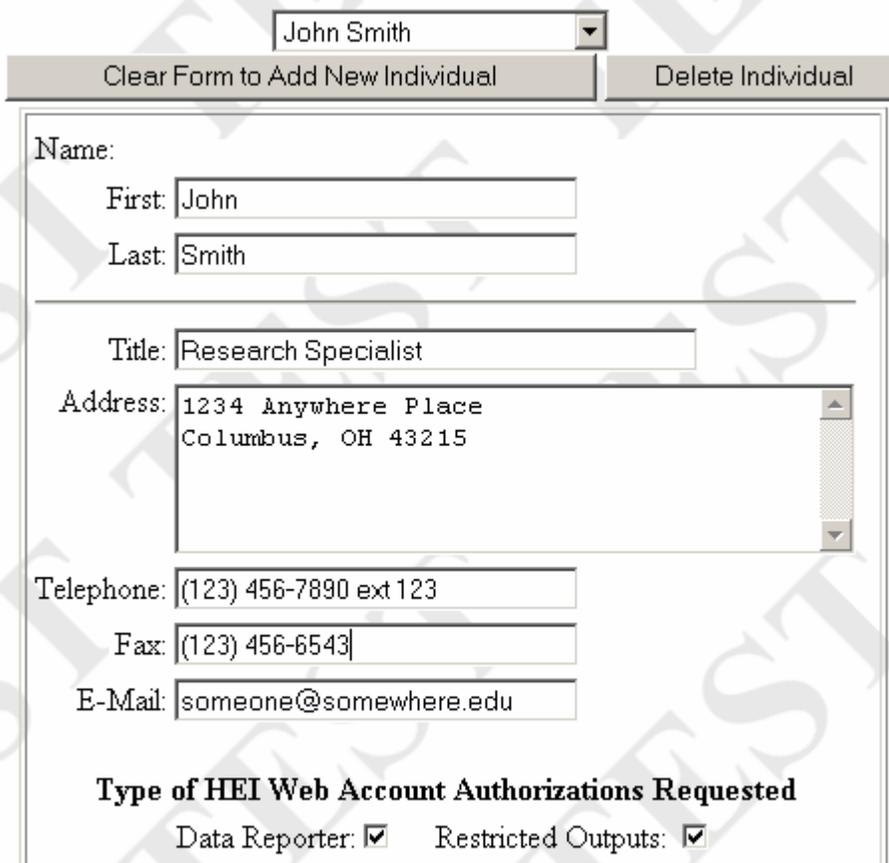
The first step involved in updating an existing user is to select their name from the “Select a Representative” drop-down.

### HEI Liaison's Web User Administration

modify or enter contact related data for data reporters or restricted outputs representatives.



This action will populate the selected existing user's information into the appropriate fields.

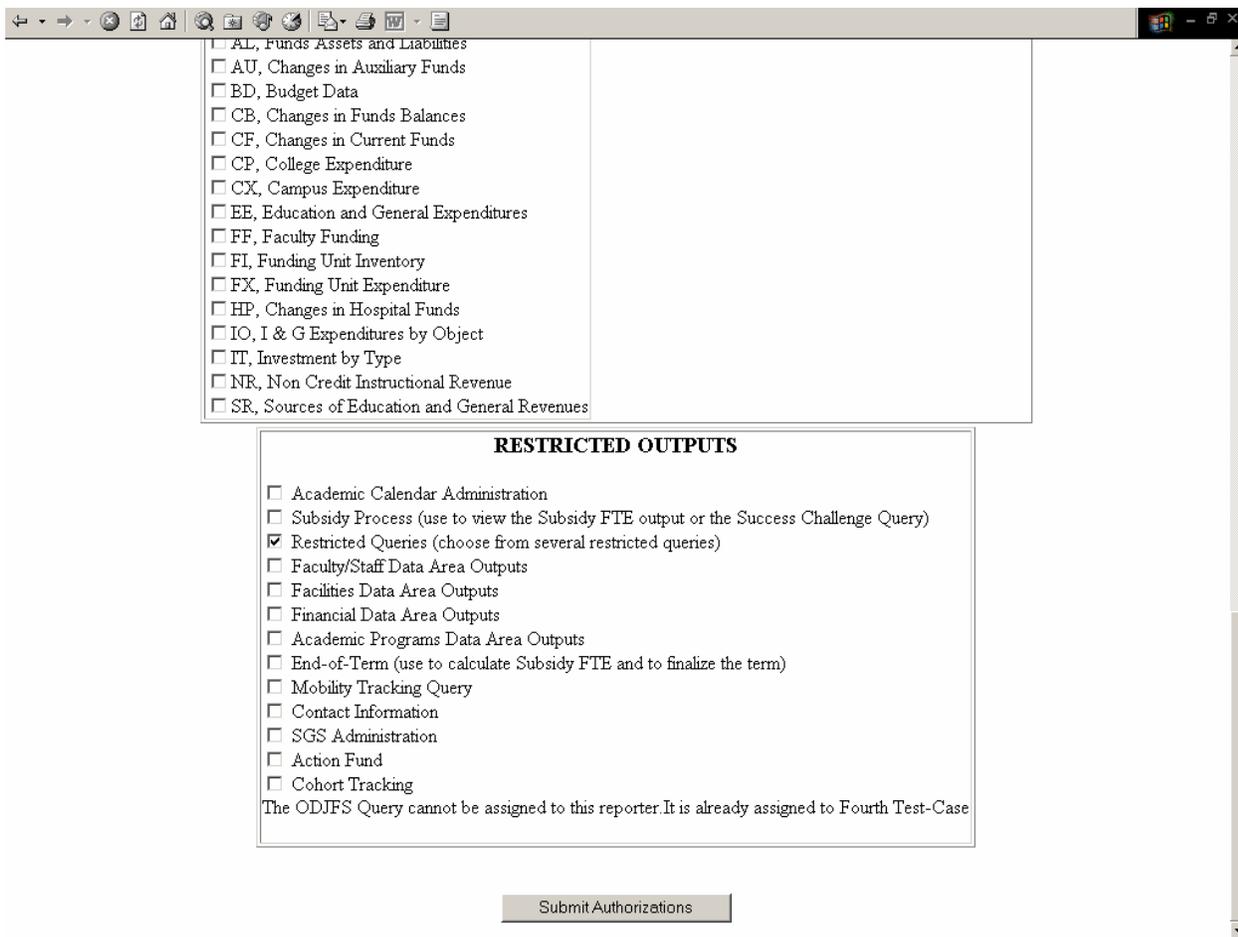


Update user information by inserting the cursor in any of the data fields and typing in the new information. Data are still validated (Ex: Is there a valid email entered?) before the Liaison can proceed to page 2.

*Please remember that un-checking the authorization boxes will remove all of the associated permissions for that type.*

Once all information has been updated correctly click “Continue to Page 2 to Submit”.

Page 2 is displayed:



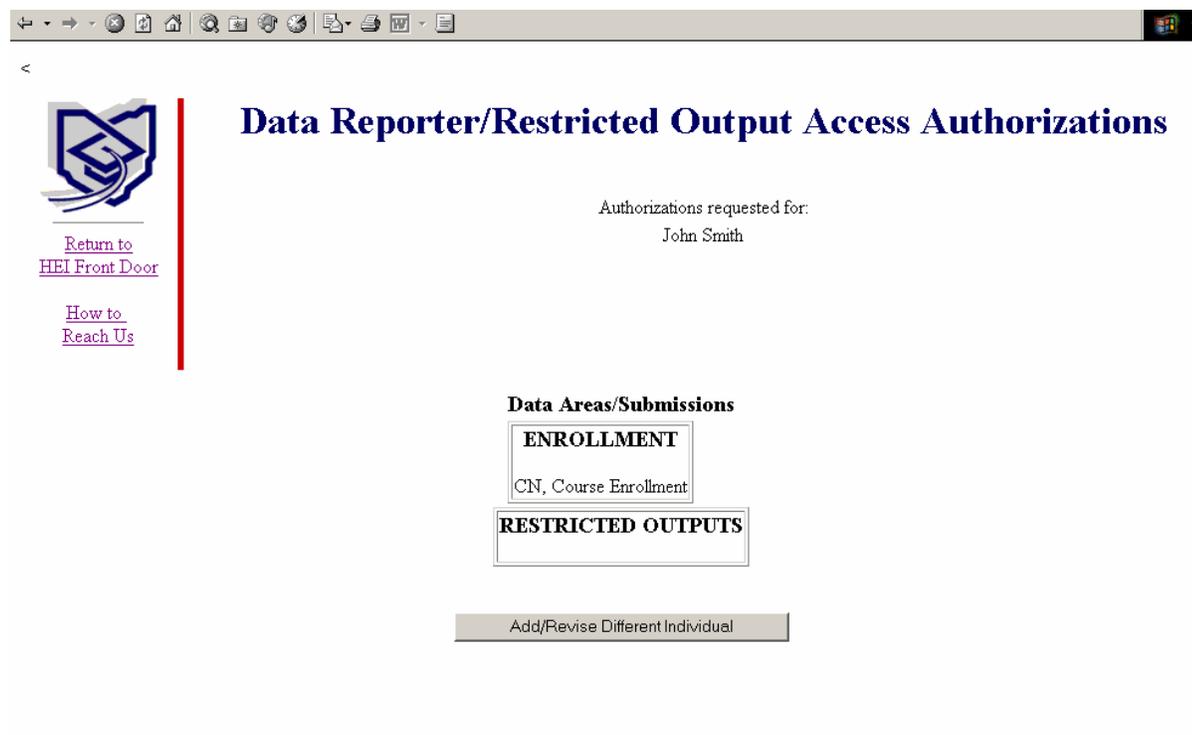
After any Restricted Outputs or Data Reporter Authorizations have been made, please remember to click “Submit Authorizations” to send the changes to the HEI system.

*Please Note:* To delete an individual one cannot simply remove their authorizations. The user must be deleted from the system by utilizing the “Delete Individual” button. Please see pages [11 – 12](#) for more information.

Upon submitting the changes, the selected user will receive an email outlining their updated information. This email will also be carbon copied to the Liaison who made the changes.



After clicking “OK” the summary screen is displayed:



Finally, select the “Add/Revise Different Individual” button to return to the main Liaison’s administration screen.

## Delete an Existing User

On the occasion when data reporters or restricted query users no longer require access to the HEI system (Ex: Job or duty changes) then they should be deleted.

To delete an existing user, begin by selecting them from the drop-down.

### HEI Liaison's Web User Administration

modify or enter contact related data for data reporters or restricted outputs representatives.

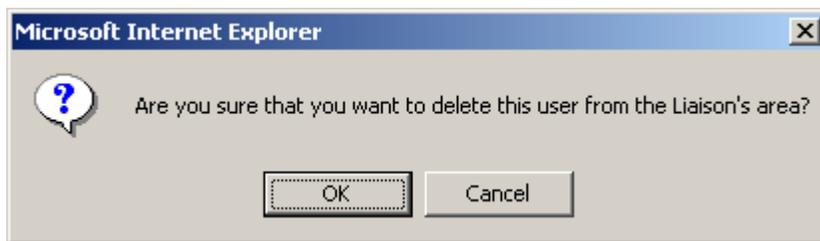
A screenshot of the HEI Liaison's Web User Administration interface. At the top, there is a dropdown menu with the text "-Select a Representative-". Below it, a list of options is displayed: "All Permissions", "Fourth Test-Case", "John Smith" (highlighted in blue), "Second Test Case", "Third Test-Case", and "-Select a Representative-". To the left of the dropdown is a "Clear Form to" button, and to the right is a "Delete Individual" button. Below the dropdown, there are input fields for "Name:", "First:", and "Last:".

A screenshot of the HEI Liaison's Web User Administration interface. At the top, there is a dropdown menu with the text "John Smith". Below it, there are two buttons: "Clear Form to Add New Individual" and "Delete Individual" (highlighted with a red border). Below the buttons, there are input fields for "Name:", "First:", "Last:", "Title:", "Address:", "Telephone:", "Fax:", and "E-Mail:". At the bottom, there is a section titled "Type of HEI Web Account Authorizations Requested" with two checkboxes: "Data Reporter:  Restricted Outputs:

Selecting a user populates the contact information fields.

Next, click the "Delete Individual" button...

...and a confirmation screen will display.



Click “OK” to delete the user, otherwise click “Cancel” to return to the main screen.



If “OK” is selected, and the user only exists for one Liaison’s area\*\*, then a confirmation screen will appear.

After clicking “OK” the selected user will no longer appear in the drop-down and an email will be sent to the requesting Liaison and the HEI Administrative Assistant informing them to destroy the authorization form within 2 business days. If for some reason the user was unintentionally deleted they will need to be added back as a new user by the Liaison. However, the authorization form will not be required as long as it has been less than 2 business days from their deletion.

*Please Note:* The deleted user will **not** be notified that they were deleted.

**\*\*Note on users with permission to more than one area:** In some cases, a user may have permissions in more than one area. For example, one user can have permissions in both enrollment and capital planning areas. If the regular Liaison chooses to delete such a user he will only be deleted from the areas in which the regular Liaison has permissions. Furthermore, the Liaison will receive an on-screen notification for the areas in which they still exist so that they may contact the other Liaison to coordinate a full deletion if necessary. In general though, if the user has permissions for only one area, then they will automatically be fully deleted from the HEI system as described beginning on [page 12](#).

## Liaison's Query

The Liaison's Query was created with the intention of providing a method for Liaisons to easily determine who has what access at their institution. The query provides detailed user information for both data reporter and restricted output authorizations. Liaisons can format the output similar to the existing people pages by selecting HTML, or they can format the output in Spreadsheet or Text. Additionally, Liaisons may limit their search to specific data areas and/or submissions.

The query is available on the [Liaisons Only](#) section of the HEI Restricted Outputs pages.

**Query Criteria**

All Data Areas

ACAD\_PGPRM  
ENROLLMENT  
FACILITIES  
FACULTY  
FACULTY PRACTICE  
FINANCIAL

All Submission Files

AB  
AC  
AE  
AF  
AI  
AL

**Restricted Output Access**

Include Restricted Access Pages

Spreadsheet  
 HTML  
 Text

Add Title & Text Information to Query   Submit Query   Clear Selections

Terminate Query

Display Previously Run Queries

Starting: Month: 01 Day: 01 Year: 1999   Go

Ending: Month: 07 Day: 05 Year: 2005

The default action of the query, with no user selections and just clicking “Submit Query”, is to produce a list of all of the approved HEI users for the Liaison’s institution in HTML format with no submission or restricted output information.

By checking the “All Data Areas”, “All Submission Files”, and “Include Restricted Access Pages” boxes a list of all approved HEI users for the Liaison’s institution with submission and restricted output permissions will be generated.