HEI Liaison's Web
User Administration
Training Guide
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Liaison’s Main Page (User’s Contact Data)

Please Note: Each institutional staff person responsible for submitting files or accessing restricted outputs must have a unique HEI Web account. Sharing of accounts and passwords is not allowed.

HEI Liaison's Web User Administration

Use this page to modify or enter contact related data for data reporters or restricted outputs representatives.

To continue adding or modifying HEI Web account authorizations, click “Continue to Page 2 to submit”. Click “Clear Form to Add New User” to clear all fields. For the training guide click “Help”.

After logging into the system (https://qry.regents.state.oh.us/cgi/contact_hei.cgi), the Liaison will be presented with a screen listing the approved HEI users for all Liaison types. There are three Liaison types: Regular (and Alternate), Financial-Aid Contacts, and Capital Planning. Both Regular and Alternate Liaisons can assign enrollment, financial, facilities, and faculty-staff data submissions along with restricted query output access. Financial-Aid Contacts can assign financial-aid submissions and financial-aid restricted query output access while Capital Planning Liaisons can only assign capital planning submission forms and queries.

Please Note: Each Liaison type can see, and assign permissions, for all of the other Liaison’s users. The system was designed in this fashion because HEI realizes that often one campus user can have many permissions across all of the different areas.
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.
Entering a New User

When entering a new user make sure that all of the fields have no data and the check-boxes are cleared. If the fields are not empty, then click the “Clear Form to Add New Individual” button. Once the fields are empty, fill all of them with the contact information as demonstrated in the above screen shot.

Please note that all of the data fields are required and at least one check box for either data reporter or restricted outputs is selected in order to continue. Once the information is verified to be correct click the “Continue to Page 2 to Submit” button to progress to the next screen. **Please Note:** It is critical that the correct e-mail address be entered for the new data reporter (the user authorization form is delivered by e-mail).

If any required information is not entered an error screen similar to this will result!
Once all error checks have passed from the first screen, the 2nd 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:

![Microsoft Internet Explorer]

HEI Web Account authorization request has been received. An email has been sent to you and the Representative with a copy of the User Agreement Form. The new account will be activated after the HEI Administrative Assistant has received the signed User Agreement Form.

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

Data Reporter/Restricted Output Access Authorizations

Authors requested for:
John Smith

Data Areas/Submissions

ENROLLMENT
CN, Course Enrollment

RESTRICTED OUTPUTS
Restricted Queries (choose from several restricted queries)

Add/Revise Different Individual

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.

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”.

Data Reporter: ✔ Restricted Outputs: ✔
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:

<table>
<thead>
<tr>
<th>Data Areas/Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ENROLLMENT</strong></td>
</tr>
<tr>
<td>CNL Course Enrollment</td>
</tr>
<tr>
<td><strong>RESTRICTED OUTPUTS</strong></td>
</tr>
</tbody>
</table>

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.

Selecting a user populates the contact information fields.

Next, click the “Delete Individual” button…
…and a confirmation screen will display.

![Confirmation Screen](image1.png)

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

![Confirmation Screen](image2.png)

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.

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.