

# HEI User Authorization

## ODHE Administrator User Manual

Version 1.1 - January 2018

HEI AUTHENTICATION  
MANAGEMENT



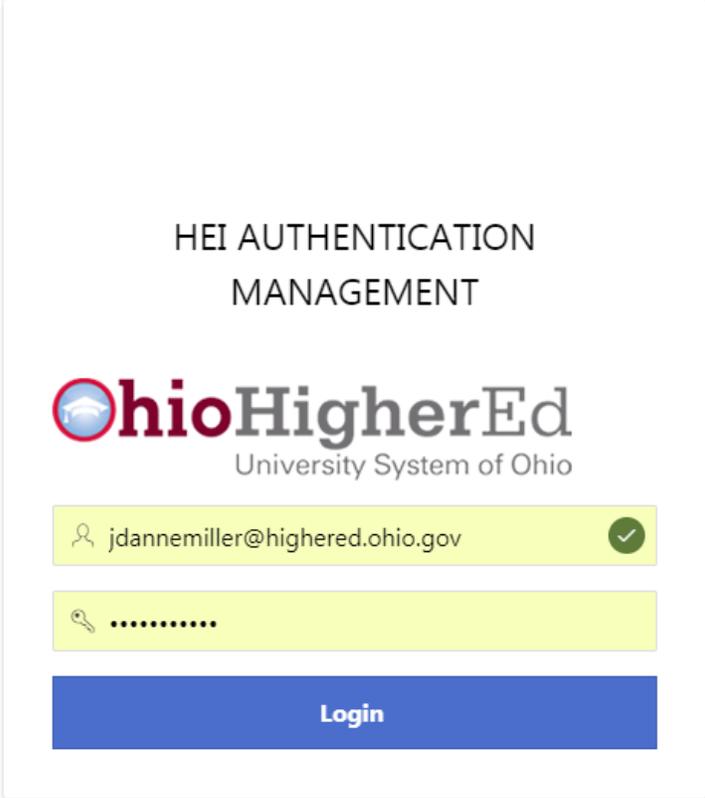
## System Access

### 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.

<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.



HEI AUTHENTICATION  
MANAGEMENT

**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

# Account management

## Account Lookup

### Account Lookup Add a New Account

Search by Username

Quick Search  Advanced 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 ?

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

## Managing an Existing Account

**Manage Account** Cancel Apply Changes

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**Account**  

\* **Institution**

\* **Account Status**  Approved  Disabled  Pending

\* **Email Address (Username)**

Authorization Form Received On

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**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.

MOBILE PHONE

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**User Roles**  

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

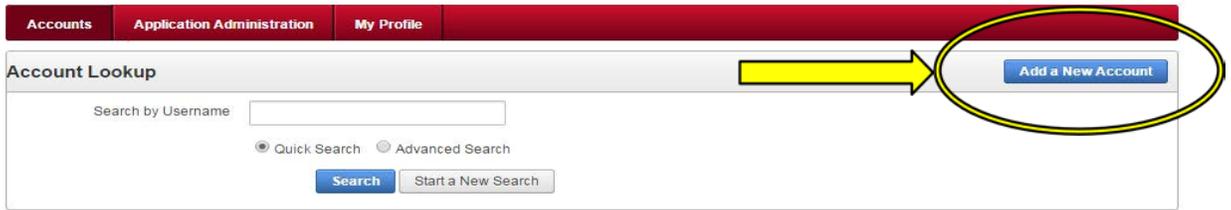
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**Account Details**  

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

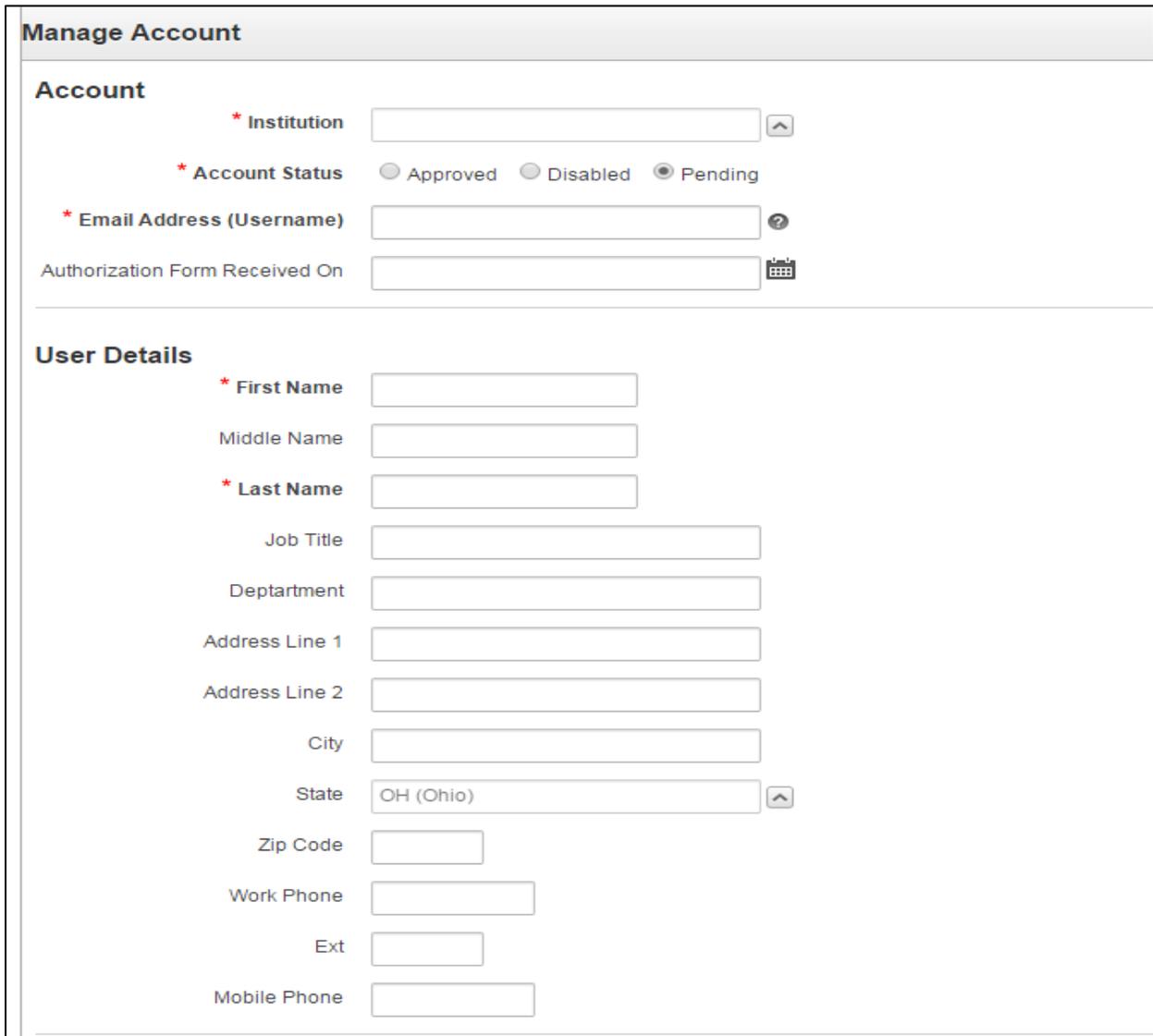
## To Create Accounts for New Users

1. Go to the Add a New Account button:



The screenshot shows a navigation bar with three tabs: "Accounts", "Application Administration", and "My Profile". Below the navigation bar is the "Account Lookup" section. It contains a search box labeled "Search by Username", radio buttons for "Quick Search" (selected) and "Advanced Search", and two buttons: "Search" and "Start a New Search". A yellow arrow points from the search area to the "Add a New Account" button, which is circled in yellow.

2. Complete the form – notes are below:



The screenshot shows the "Manage Account" form, which is divided into two main sections: "Account" and "User Details".

**Account Section:**

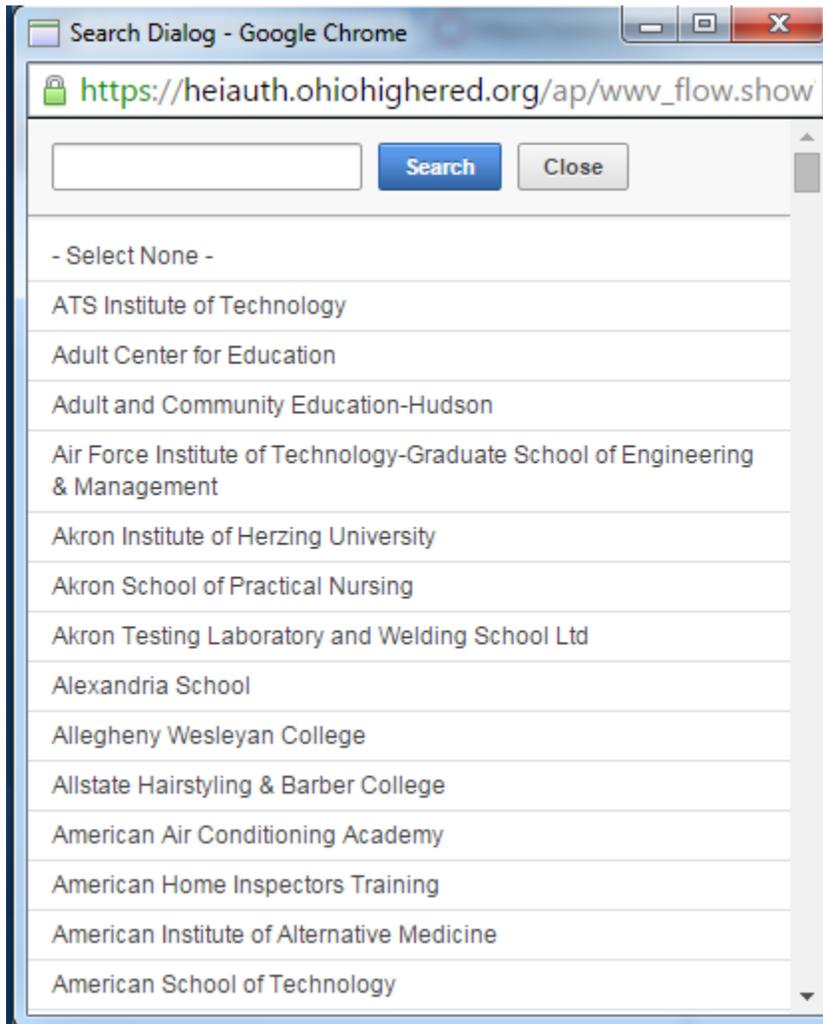
- \* Institution:** A text input field with a dropdown arrow.
- \* Account Status:** Radio buttons for "Approved", "Disabled", and "Pending" (selected).
- \* Email Address (Username):** A text input field with a help icon.
- Authorization Form Received On:** A date input field with a calendar icon.

**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:

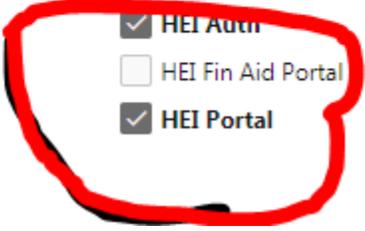


### Assigning Application Roles

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.

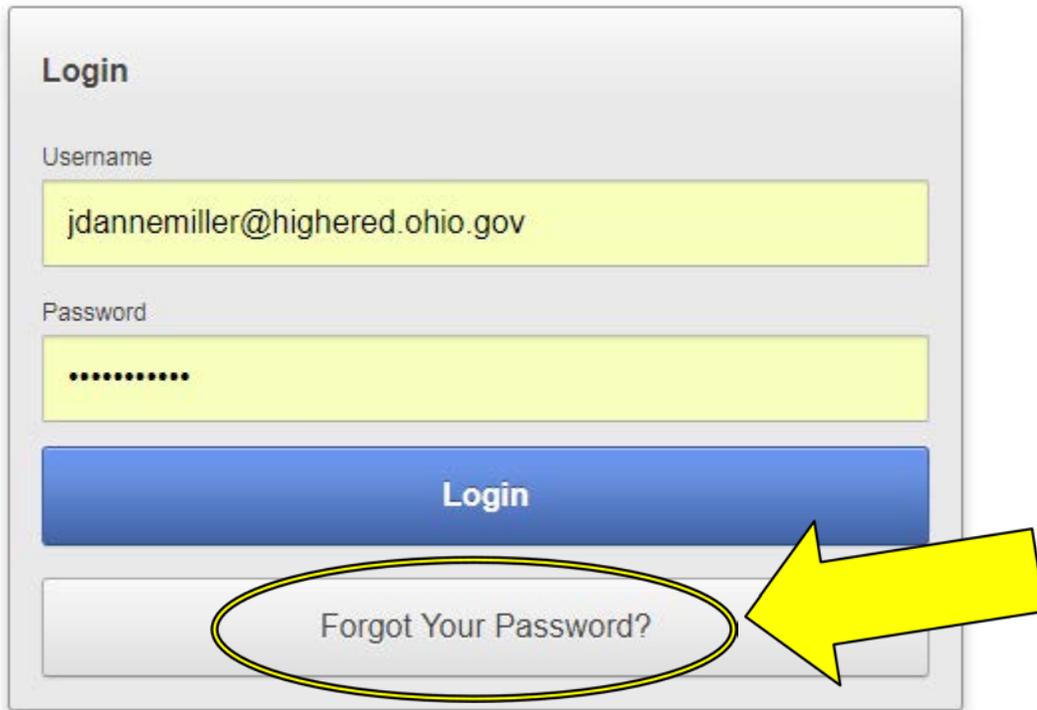
- HEI Portal - Academic Programs Data Reporter
- HEI Portal - Distance Learning Data Reporter
- HEI Portal - Distance Learning Program Administrator
- HEI Portal - Enrollment Data Reporter
- HEI Portal - Facilities Data Reporter
- HEI Portal - Faculty/Staff Data Reporter
- HEI Portal - FinAid NEALP Data 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](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, they or their IT staff may need to add it to their safe/known sender list, which might help if it is actually a SPAM filtering issue.