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## PROXY PORTAL – *How-To Guide for Proxies*

Proxy Portal allows Sam Houston State University students to grant parents, guardians, coaches, or potential employers' access to specific parts of their records online, pertaining to financial aid and/or registration. Anyone granted access to view a student's information online is referred to as a proxy. Once a proxy has been granted access, they will need to set up an account to access the information granted by the student. When setting up a proxy, the student will designate a window of dates the proxy has access. This window can be edited by the student at any time.

Creating a proxy account is done through a series of emails sent to the email account the student provides when creating a proxy.

**Note:**


- Emails indicating you have been established as a proxy do not have a set order of delivery.
- It may take a few minutes before receiving emails once you have been set as a proxy.
- If you cannot find the email, check your junk folder.
- If you are unable to locate the email or if the link does not work, your student will need to designate a different email address for you to use.

**Setting up account:**


1. Check your email account and follow provided instructions:
  - a. One email will be titled *Sam Houston Proxy Confirmation – Initial Password* and have a code to use in the one-time use link from the *Confirm New Sam Houston Proxy Identity* email.
  - b. One email will be titled *Confirm New Sam Houston Proxy Identity* and will have a one-time link to be used with the code from the *Sam Houston Proxy Confirmation- Initial Password* email.
  - c. One email will be titled *Sam Houston Proxy Relationship Information* and will state what type of proxy you have been granted as well as the permanent link to access the student's information after setting up your account.
    - i. *It is recommended that you save this link for future use.*



2. Click the one-time authorization link from the *Confirm New Sam Houston Proxy Identity* email and input code provided in the *Sam Houston Proxy Confirmation – Initial Password* email.





**Enter your Initial Password, then click Submit to continue.**



An email you received contained a URL (which you have used to get here), and a separate email contained an initial password. These are used together to verify that you are an intended recipient. You will also use the password for the "Initial Password" on the following page when establishing your new password.

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3. Input necessary information.



**Reset your security password for Proxy Access.**


Your email address has been verified. The next step is to save your password for proxy access. Enter your new password twice. For higher security, use a combination of uppercase letters, lowercase letters and numbers.



4. Log into the system with your email address and new password.

**Banner®**

Enter your user name and password, then click Sign In to continue.



[Forgot Password](#)

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5. You now have access to the information your student has allowed you to view!



**Viewing student's information:**

1. Access proxy link from the *Sam Houston Proxy Relationship Information* email.
  - a. You will be directed to the below log in page. Use your email address as your username and the password you previously created.

The image shows a login page titled "Banner®". It contains the text "Enter your user name and password, then click Sign In to continue." Below this is the Ellucian logo and a sign-in form with fields for "Username" and "Password", and a "Sign In" button. A "Forgot Password" link is located below the password field. At the bottom, there is a copyright notice: "© 2013-2021 Ellucian Company L.P. and its affiliates. All rights reserved. This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this [site/software/app] is limited to Ellucian licensees and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees."

2. If you have multiple students, find the one you want to view information for and select which page to view from the dropdown.

The image shows a user interface for selecting a student to view. It includes a "Hello" greeting, a notification: "You've been authorized to view content for the student(s) below. Click each tile to select the page you wish to view.", and a "Proxy Personal Information" section. Below that, there are two rows, each with "I am a proxy for" followed by a student ID and a "Select to view" dropdown menu. A red box highlights the first dropdown menu.

The image shows a dropdown menu with the title "Select to view". The options listed are: "Student Detail Schedule" (highlighted in blue), "Week at Glance", "Financial Aid Status", "Student Holds", and "Student Profile". A red arrow points from the dropdown menu in the previous image to this one.

**NOTE:** If there is a page you cannot see but believe you should have access to view, you will need to contact your student.



**Updating account information:**

1. Access proxy link from the *Sam Houston Proxy Relationship Information* email.
  - a. You will be directed to the below log in page. Use your email address as your username and the password you previously created.

The screenshot shows the Banner login interface. At the top right is the 'Banner' logo. Below it, the text reads 'Enter your user name and password, then click Sign In to continue.' On the left is the 'ellucian' logo. In the center are two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a 'Sign In' button. Below the input fields is a link for 'Forgot Password'. At the bottom, there is a copyright notice: '© 2013-2021 Ellucian Company L.P. and its affiliates. All rights reserved. This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this [site/software/app] is limited to Ellucian licensees and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees.'

2. Select Proxy Personal Information at the top of the landing page.

The screenshot shows the Banner landing page. At the top, it says 'Hello [redacted]'. Below that is a blue banner with the text: 'You've been authorized to view content for the student(s) below. Click each tile to select the page you wish to view.' There are three tiles. The first tile, 'Proxy Personal Information', is highlighted with a red box. Below the tiles are two rows, each with a 'I am a proxy for' label, a redacted name, and a 'Select to view' dropdown menu. The first dropdown menu is also highlighted with a red box.



3. Make changes as necessary and select submit at the bottom of the page.

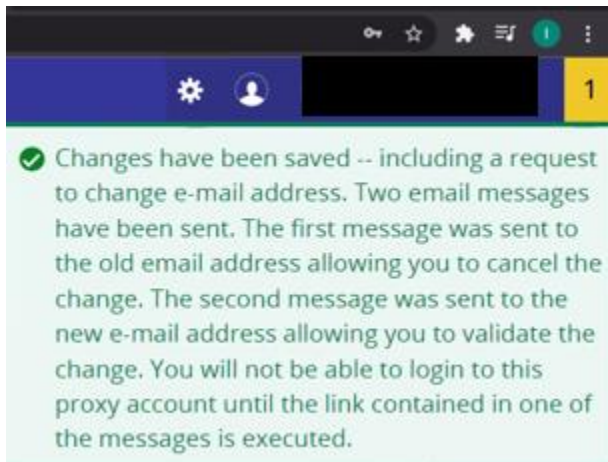
Proxy Personal Information [Click here to change your password.](#)

**i** Please keep your Banner Web proxy information up-to-date.

Personal Details \* - indicates a required field.

Salutation	First Name*	Middle Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name*	Name Suffix	Nickname
<input type="text"/>	<input type="text"/>	<input type="text"/>

**NOTE:** If you update your email address, the below message will appear.





When access expires:

Once your access expires, you will be notified by a pop-up upon login notifying you. If you require continued access, please contact your student.

