Set Up Proxy – Student Instructions

Instructions for students to set up a Proxy in SalukiNet are provided in this document. This process allows you to manage user ID’s so parents, or anyone else that you would like to authorize, can make a Bursar bill payment, add funds to your Debit Dawg account, review Financial Aid, course schedule or grades, etc.

Navigate to the Proxy Management Page

- To begin, login to your SalukiNet Account and click your MyRecords tab.
- The middle column of the My Records page contains a section called Proxy Management.
- Click the link, Manage Proxy Users.

A Self-Service window appears with the Proxy Management tab open by default.

- On the left side of this page, you will see the “Proxy Access Menu”.
- The Menu contains a link called Proxy Management. Click that link.
- The Proxy Management page opens.
- This page contains your Proxy List. You will use it to add, modify or revoke proxy access.

Add Proxy

- To begin, click the Add Proxy link at the bottom of the Proxy List.
- Clicking that link displays a list of fields that you are required to populate.
- Enter the required information.
- Then, select the Add Proxy button at the bottom of the page.

Note: An email is automatically generated and sent to you and the person you’ve entered as Proxy, immediately after you click the button.
To confirm the addition, a message appears on the page... “✓ A new proxy has been successfully added.”

**IMPORTANT: DO NOT STOP HERE!** The next step is to define the relationship type and authorizations. This step must be completed in order for your proxy to be able to view your information.

**Define Relationship Type and Authorization**

- Locate the proxy you just added in your Proxy List.
  - For privacy reasons the proxy’s last name and email have been blocked.
  - The lock icon, appearing after the Proxy’s name, indicates no Relationship and no Authorizations have been applied to this proxy.

- Click the respective Down Arrow to define the proxy’s relationship and authorizations.

- That action expands the page to show two tabbed regions: Profile and Authorization.

- Under Profile you are required to select a relationship. Click the Down Arrow for the Relationship field and select “Proxy Access”.
  - This is the only option you have for a Relationship.

- Next, enter a Description (optional).
  - The description identifies the person, as mom, dad, coach, etc.

- If desired, enter a Passphrase (optional).
  - The passphrase may be used to verify identity for phone calls or other off-line queries by this proxy.

- The Start Date and the End Date will populate automatically. Review and change these, as needed.

**IMPORTANT:** You must communicate the passphrase to your proxy by clicking the E-mail Passphrase link located beneath the fields. An email notification will automatically be sent to

- A confirmation will appear on your screen when the email is sent.
Next, click the **Authorization** tab.

Now you can select the information that you want your proxy to access.

**Note:** Under Student Records, the checkbox for **Select a Different Term** is selected by default. This is necessary for your proxy to be able to look at information that is term-based, such as schedule of classes or grades.

**IMPORTANT:** There isn’t a Save button for the Authorization options you choose. When you click on a selection, a checkmark appears and the action is saved automatically.

When finished, click the **Collapse** icon in front of the proxy’s name.

Do you notice any changes on the Proxy List? The **Lock** icon is replaced with the # of pages accessible to the Proxy.

To add another proxy, just click the **Add Proxy** link and complete the steps, as before.

To end the session, click the ‘X’ on the **Proxy Management** tab to close the page or just close your Browser.

**IMPORTANT:** To take away a proxy’s authority:
- Navigate to the Proxy Management page.
- Locate the proxy in the Proxy List.
- Click the expand icon for that proxy.
- Under Profile, **change the Stop Date** or under Authorization, **uncheck** all accessible pages.

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