



## Proxy Access

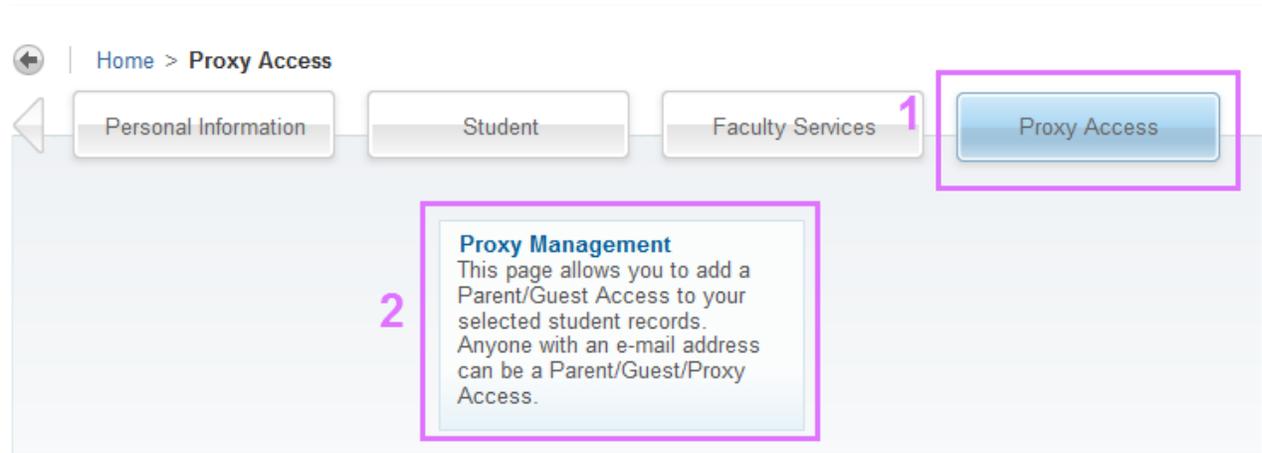
### Introduction

Students can allow their parents, guardians, or others access to elements of their student record through myHeliotrope by granting them **Proxy Access**. Those who are given proxy access will be permitted to view information in the student account by accessing myHeliotrope through their personal e-mail address. Students can control which parts of their records will be visible to each proxy account and can update, manage, or remove proxy access at any time. The first section of this guide is for students who want to set up or manage proxy access. The second section is for proxies who want to know how to activate their proxy account and view information.

### For Students

#### Getting Started with Proxy Access

1. Log in to the Purchase Portal at [my.purchase.edu](http://my.purchase.edu).
2. Click on **myHeliotrope**.
3. Click on **Proxy Access**.
4. Click on **Proxy Management**.

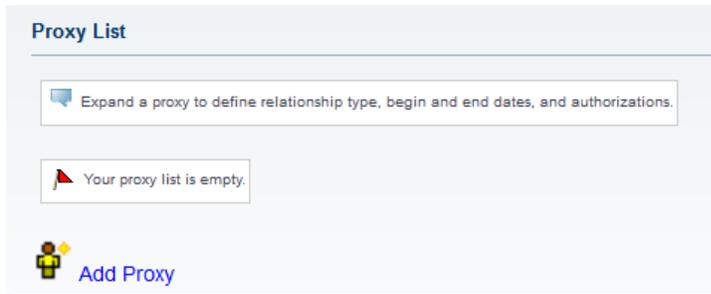


Any existing proxies will be listed here. To add a new proxy click **Add Proxy**.

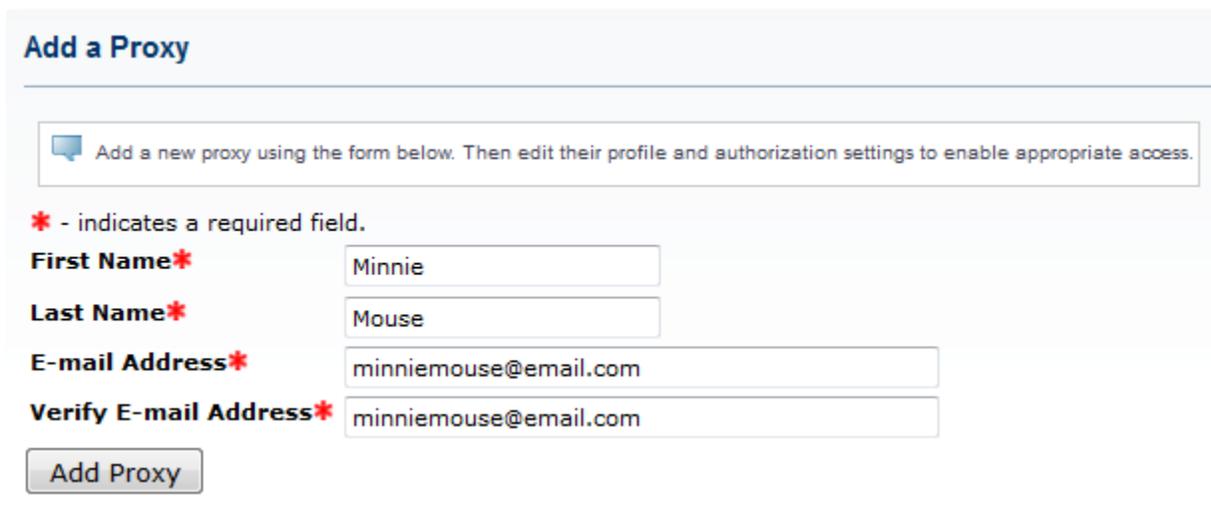
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## Proxy Access



Enter the name and e-mail address of the person you are granting proxy access to. An e-mail will be sent to the proxy's provided e-mail address asking them to activate the proxy account.



Once you add the proxy, you can manage their information and the access you want them to have by clicking on **"Expand [Name of Proxy]."**



You will see four categories expand: Profile, Authorization, History, and Communication.





## Proxy Access

### Proxy Profile

To set up your proxy's profile, click **Profile**. Fill in as much of this information as possible.

**Proxy Profile**

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Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type. The description field is your personal note about this proxy (dad, mom, so proxy. You can control the start and end dates for proxy access below.

Special profile tab Information text dealing with parents.

**\* - indicates a required field.**

**Relationship\***

**Description**

**Passphrase**

**Start Date (MM/DD/YYYY)\***

**Stop Date (MM/DD/YYYY)\***

 [E-mail Passphrase](#)  [Reset PIN](#)  [Delete Proxy Relationship](#)

Passphrase set to "Maple Tree"

Description set to "Mother"

 Your proxy has not verified their email address.

 The proxy PIN is disabled.

**Relationship:** Select your proxy's relationship to you (e.g., Parent or Legal Guardian).

**Description:** Use this field to specify your proxy's relationship to you (e.g., Mother).

**Start Date:** Enter the date your proxy may begin accessing the information you are authorizing.

**Stop Date:** Enter the date after which your proxy should no longer have access.

You may also reset your proxy's pin or delete the proxy relationship from this section. If you delete a proxy relationship, you will need to recreate if you ever want to grant this proxy access at a later date. It is recommended that you use stop date to temporarily suspend the proxy's access, rather than deleting the proxy relationship.

Any information you update in this session will be confirmed below the profile fields and options.



## Proxy Access

### Proxy Authorization

The **Page Authorization** section is where you can select the specific types of information your proxy can view. To get there, click **Authorization** and scroll down. You can click **Proxy Parent Options** to select all recommended areas of access. Click the page links to view the specific pages you are granting access to by clicking the box. This authorization can be updated or removed at any time.

**Page Authorization**

Select the information pages your proxy should be able to access. Once authorized, your proxy will be able to view and/or update these pages when they log in. Be sure to always check the "Select Term" box.

Special authorization tab information text dealing with parents.

**Copy Authorizations**  
Select Proxy ▾

E-mail Authorizations

Proxy Parent Options

- Class Schedule
- Account Summary
- Account Summary by Term
- Account Detail for Term
- Statement and Payment History
- Purchase College Payment Center
- Admissions and Room Deposits
- Purchase College Time Payment Plan

If you want to grant an identical set to another proxy, select the additional proxy from the dropdown menu under **Copy Authorizations**. The proxy account must already be created to do this.

You can e-mail the list of authorized pages to your proxy by clicking **E-mail Authorizations**.

### Proxy History

The **Authorization Log** shows when your proxy accessed your records and which pages they viewed. It also shows when you enable or disable access to particular pages. You may access this by clicking **History** and scrolling down.

**Authorization Log**

This list is the history of your authorizations for this proxy (newest to oldest).

Special history tab information text dealing with parents.

Date	Action	Page
Jan 24, 2014 11:14 am	Enable	Purchase College Payment Center
Jan 24, 2014 11:14 am	Enable	Purchase College Payment Center
Jan 24, 2014 11:14 am	Enable	Statement and Payment History
Jan 24, 2014 11:14 am	Enable	Statement and Payment History
Jan 24, 2014 11:14 am	Enable	Account Detail for Term
Jan 24, 2014 11:14 am	Enable	Account Detail for Term
Jan 23, 2014 04:43 pm	Login	Display authorization menu
Jan 23, 2014 04:06 pm	Enable	Account Summary by Term



## Proxy Access

### Proxy Communication

The **Communication Log** is the record of e-mails that were sent to the proxy and what information they contained. This also shows when the proxy activated their account. You can access this by clicking Communication and scrolling down. You can resend any of the communications by clicking the e-mail icon under the **Resend** column.

#### Communication Log

Action date is when the proxy activated the URL within the message. Expiration date is when the URL within the message will last be active.  
Special communication tab information text dealing with parents.

Transmit Date	Subject	Action Date	Expiration Date	Resend
Jan 24, 2014 11:06 am	Send proxy PIN reset request		Jan 29, 2014	
Jan 23, 2014 04:42 pm	Send updated proxy profile data			
Jan 23, 2014 04:30 pm	New proxy identity	Jan 23, 2014	Jan 28, 2014	
Jan 23, 2014 04:00 pm	New proxy relationship			

## For Proxies

### Introduction

Students can allow their parents, guardians, or others access to elements of their student record through myHeliotrope by granting them **Proxy Access**. Those who are given proxy access will be permitted to view information in the student account by accessing myHeliotrope through their personal e-mail address. Students can control which parts of their records will be visible to each proxy account and can update, manage, or remove proxy access at any time. The first section of this guide is for students who want to set up or manage proxy access. The second section is for proxies who want to know how to activate their proxy account

### Activating a Proxy Account

When a student adds you as a proxy, you will receive an e-mail with the subject **“New proxy identity”** containing an account activation link and a **PIN**. Follow the activation link and enter your e-mail address the PIN you have been provided.



## Proxy Access

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Enter the e-mail address that was registered as a Banner Web proxy. Then enter the PIN that was used to activate your Banner Web pages. All Banner Web pages are personal and confidential. The proxy PIN should be used to access Banner Web pages using the 'Forgot PIN' or 'Reset PIN' button.

\* - indicates a required field.

E-mail Address\*

PIN\*

Login Forgot PIN

On the next page, enter your e-mail address. In the **Old PIN** field, re-enter the PIN from the activation e-mail. In the **Enter New PIN** field, enter a new, unique **numeric** PIN of your choosing, 6-15 characters long. Re-enter this new PIN in the **Validate PIN** field.

\* - indicates a required field.

Minimum PIN length: 6 Maximum PIN length: 15.

Enter e-mail address\* minniemouse@email.com

Enter Old PIN\* .....

Enter New PIN\* .....

Validate PIN\* .....

Save

After you have established your PIN, you are ready to use your Proxy Access account.

### Using Proxy Access

You can login to the Proxy Access System at any time by going to [www.purchase.edu/parents](http://www.purchase.edu/parents) and clicking the Parent Proxy Access link in the left sidebar menu.

After logging in for the first time, you will be prompted to complete some profile information. Complete this information to the best of your ability. Required fields are marked with red asterisks.



## Proxy Access

**Proxy Profile**

Please keep your Banner Web proxy information up-to-date. [Click here to change your PIN](#)

\* - indicates a required field.

Salutation

First Name \*

Middle Name

Last Name \*

Name Suffix

Nickname

E Mail Address \*

Permanent Phone Area Code

Permanent Phone Number

Permanent Phone Extension

Permanent Address Line 1 \*

Permanent Address Line 2

Permanent Address Line 3

City \*

State \*

Zipcode \*

Nation \*

Gender

Birthdate (MM/DD/YYYY)

SSN/SIN/TIN

**Save**

[Building Authorized Page List](#)

You can access the pages the student has authorized you to view by clicking on the name of the student at the top of your profile and scrolling down. You may click on any of the pages under **Proxy Authorizations** to view the information. The page will open in a new window or tab.



## Proxy Access

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### Proxy Authorizations

The following Banner Web page links have been sp

We appreciate your effort to be a good parent.

#### Proxy Parent Options for Blarney Stone

[Class Schedule](#)

[Final Grade](#)

[Account Summary](#)

[Account Summary by Term](#)

[Account Detail for Term](#)

[Statement and Payment History](#)

[Purchase College Payment Center](#)