

## Requesting Access to Apex Reporting An Instruction Guide

Created with Tango 11 Steps

## SR www.sulross.edu

Start on the Sul Ross State University website's homepage.

### STEP 1

## Click on mySRSU



### Sign in to your Sul Ross account.

| SR SUL ROSS<br>The FRONTIER University of Texas  |
|--|
| Sign in to your account       kxw16ff     Sign Ir       Remember me on this computer   |
| For security reasons, please Log Out and Exit your web browser when you<br>SRSU System Use Notification:<br>You are accessing a system owned by the State of Texas<br>Unauthorized use is prohibited and subject to criminal and civil penalties<br>Usage may be monitored, recorded, and subject to audit<br>There should be no expectation of privacy except as otherwise provided |

### STEP 3

### Once you've been logged in to mySRSU scroll down a bit to find "Banner" under the section "SRInfo".

|  |  | MYSRSU HOME LTAC (TECH HELP) | Email UCTV CONTACT SRSU | OneDrive   Blackboard   My Degree Plan<br>RESLIFE MAINTENANCE REQUEST |
|--|--|------------------------------|-------------------------|---|
| Kayla Waggoner<br>Coordinator<br>Institutional Effect<br>BAB 202<br>kov16ff@sulross.e<br>432-837-8720<br>(edit my director | lveness<br>du<br>y poge)                   |                              |                         | QUALTECS  |
| my Account   | my Courses                                 | Student Services             | SRInfo                  |   |
| LoboOnLine Links:<br>My Personal Profile<br>Student Dashboard<br>Employee<br>Dashboard<br>Direct Timesheet<br>Link         | My Schedule                                | Housing                      | Course Information      | _   |
|  | e Curriculum Change Request My Degree Plan | Financial Aid                | Faculty and Staff       |   |
|  |  | Registrar                    | Directory               |   |
|  | 10100                                      | Excellence                   |                         |   |
| Link   | HOLDS                                      |                              | SPInfo Home             |   |
| Link<br>Faculty Dashboard  | HOLDS                                      |                              | SRInfo Home             |   |
| Link<br>Faculty Dashboard<br>Dining Menu   | nows                                       |                              | SRInfo Home             |   |
| Link<br>Faculty Dashboard<br>Dining Menu<br>Account Balance = \$0<br>Password Expires:                                     | nuus                                       |                              | SRinfo Home             |   |

# When on the Banner SRInfo page select "Create Access Request" to start the process of requesting access to various Ellucian systems.

| Welcome to the Banner Resources page. Use this page to Access Need to Request Access Sul Ross has implemented a web-based system to allow manage Managers can submit requests for access for their employees Managers and the employee will receive notifications as the pr To Access the system click the link below |
|---|
| Need to Request Access<br>Sul Ross has implemented a web-based system to allow manage<br>• Managers can submit requests for access for their employees<br>• Managers and the employee will receive notifications as the pro-<br>• To Access the system click the link below   |
| <ul> <li>Sul Ross has implemented a web-based system to allow manage</li> <li>Managers can submit requests for access for their employees</li> <li>Managers and the employee will receive notifications as the placement of the system click the link below</li> </ul>  |
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| Managers and the employee will receive notifications as the p<br>To Access the system click the link below  |
| <ul> <li>To Access the system click the link below</li> </ul>   |
|   |

### STEP 5

## Sign in once again using your SRSU login credentials.

| <b>SR</b> |  |
|-----------|--|
| A kxw16ff |  |
| S         |  |
| Sign In   |  |
|           |  |

This request form runs through a portion of Apex. Select "SRSU App for Administrative Systems" to start a request.

| = Sul Ross Applica | tions and Reports Navigator |              |                |  |
|--------------------|-----------------------------|--------------|----------------|--|
| Home               | Security Access Requ        | ests         |                |  |
|                    | Q~                          | Go Actions ~ |                |  |
|                    |                             |              | Q              |  |
|                    |                             |              | No data found. |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |
|                    |                             |              |                |  |

### STEP 7

Click on "Create New Request".

| Q, kxw16ff ∽       |
|--------------------|
|                    |
|                    |
| Create New Request |
|                    |
|                    |
|                    |

## Type in the first or last name of the individual that needs Ellucian access.

1. You cannot put yourself down since this request is only made by managers/supervisors.

2. You can try to use A# to search for individuals but it is not as consistent as someone's name.

| Reports Navigator |   |   |
|-------------------|---|---|
| Security Access   | ss Requests   |   |
| Q×                | Security Access - Add/Edit Request Details  | × |
|                   | Instructions: This form is to be completed by the Employee's Manager/Supervisor for the<br>purpose of establishing or granting additional access. Please feel free to provide any additional<br>information in the comments section that is helpful to the data owners when evaluating this<br>request. |   |
|                   | Person Id ~   |   |
|                   | Access Justification  |   |
|                   | Access Requested ↑≞   |   |
|                   | Access to Advisor Self-Service and Degree Plans   |   |
|                   | Access to Banner Fin Aid  |   |
|                   |   |   |
|                   | Access to Banner Finance/Finance Self Service   |   |
|                   | Access to Banner Finance/Finance Self Service     Access to Banner HR   |   |
|                   | Access to Banner HR     Access to Banner HR     Access to Banner HR     Access to Banner Student  |   |
|                   | Access to Banner Finance/Finance Self Service      Access to Banner HR      Access to Banner Student      Access to Reporting   |   |
|                   | Access to Banner Finance/Finance Self Service     Access to Banner HR     Access to Banner Student     Access to Banner Student     Access to Reporting     Access to Scial Security Numbers  |   |

## Provide your justification for the access request in the box below "Person Id".

In this example, we've noted that Dean Laura Payne is the employee who needs access to the system.

| ter benere and the second s | quests   |      |
|---|--|------|
| Q~  | Security Access - Add/Edit Request Details   | ×    |
|   | Instructions: This form is to be completed by the Employee's Manager/Supervisor for the<br>purpose of establishing or granting additional access. Please feel free to provide any additiona<br>information in the comments section that is helpful to the data owners when evaluating this<br>request. | al . |
|   | Person Id<br>A00011134 - Payne, Laura  |      |
|   | Dean Laura Payne needs access to Apex Reporting for her position.  |      |
|   | Access to Advisor Self-Service and Degree Plans  |      |
|   | Access to Banner Fin Aid   |      |
|   | Access to Banner Finance/Finance Self Service  |      |
|   | Access to Banner HR  |      |
|   |  |      |
|   | Access to Banner Student   | -    |
|   | Access to Banner Student     Access to Reporting   |      |
|   | Access to Banner Student     Access to Reporting     Access to Social Security Numbers   | -    |
|   | Access to Banner Student     Access to Reporting     Access to Social Security Numbers     Access to Student Holds   | -    |

If you are wanting to request "Apex Reporting" access select the following option.



#### STEP 11

Hit "Submit" when you've selected all of the options that apply. Be sure to include justification for all of the systems that you're requesting access to.

| Pers        | Person Id<br>A00011134 - Payne, Laura   |   |    | ĺ |
|-------------|---|---|----|---|
| Aco         | Access Justification<br>Dean Laura Payne needs access to Apex Reporting for her position. |   |    |   |
|             |   | Access Requested ↑=                             |    |   |
|             |   | Access to Advisor Self-Service and Degree Plans |    |   |
|             |   | Access to Banner Fin Aid                        |    |   |
|             |   | Access to Banner Finance/Finance Self Service   |    |   |
|             |   | Access to Banner HR                             |    |   |
|             |   | Access to Banner Student                        |    |   |
|             |   | Access to Reporting                             |    |   |
|             |   | Access to Social Security Numbers               |    |   |
|             | 0   | Access to Student Holds                         |    |   |
|             |   | Document Imaging                                |    |   |
|             |   | FTP Setup                                       |    |   |
|             |   |   | -  |   |
| Cic         | lose  | Subm  | it |   |
|             |   |   |    |   |
|             |   |   |    |   |
| Release 1.0 |   |   |    |   |
|             |   |   |    |   |