How to fill out the Edgar/Banner Security Agreement – Full Agreement


   a. In the email address section you will enter your full, Net ID Rice email address. Ex: cej1@rice.edu.

   b. Do not enter a password.

   c. Click on Sign In.

2. You will then see the Rice Identity Provider login.

   a. Enter your Net ID and Net ID Password.

   b. Click Login.

   c. You should see the following page, with the Rice logo on top. (Note: If you do not have the Rice logo on the AdobeSign page, please send an email to help@rice.edu to request access to AdobeSign.).
3. In the middle of the page, you will click **Start from library**, and then click on **Workflows** on the left side menu. Under the Account Workflows on the right side menu, select the workflow "OIT – Security Agreement - Edgar/Banner" from the dropdown, then click **Start**. (If you do not see the "workflow drop down", please email help@rice.edu to request AdobeSign access.).

4. Enter the applicant and department approver Net ID Rice e-mail addresses. *(Note: The department approver must have Signature Authority for the access that is being requested.).

5. Update the document name to read “Edgar/Banner Security Agreement – FIRST LAST YYMMDD” *(Note: First and Last should be the first and last name of the applicant.).
6. Click Send.

7. This will bring you to the application. Please make sure to complete every field with a red asterisk along with any security access being requested. Once the
form is completed, click the submit button in the bottom black bar. (Note: Incomplete or inaccurate forms will require additional time to process.).

<table>
<thead>
<tr>
<th>Applicant Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name: *</td>
</tr>
<tr>
<td>Rice email address</td>
</tr>
<tr>
<td>Position Type: *</td>
</tr>
<tr>
<td>Department</td>
</tr>
<tr>
<td>New Account: (NetID)</td>
</tr>
<tr>
<td>Changes to existing account:</td>
</tr>
<tr>
<td>Do you want this account set-up identical to another account?</td>
</tr>
</tbody>
</table>

Position Types: Staff, Faculty, Temporary, Consultant, Student Worker
Financial System Data Access

Select any Query forms needed

Select any Data Entry forms needed
NOTE: if Data Entry forms are selected, “Both” access will be needed for the fund/org

Individual Fund & Orgs Security Privileges

All Funds can be selected if a user needs access to All funds in specific org(s). Orgs can be listed under the Org Code Range

Enter the Fund and Org
Q = Query Only
B = Both Query and Posting

All Orgs access should ONLY be checked if a user needs access to All Orgs in the University. This is NOT for All Orgs in a specific department

Enter any additional funds/orgs that don’t fit above. Any additional Finance access notes can also be entered here.

Note
Unless stated otherwise, FUNDS listed above left will be accessible within ALL ORGS listed above right.
### Research Grants for Specific PI's

Grant access to Research Grants, Awards, and Proposals for the Principal Investigators listed below:

<table>
<thead>
<tr>
<th>Name</th>
<th>Query/Both*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

If a user needs access to any PI funds, enter the PI full name and select Query or Both.

### Budget Transfer App

Do you need access to the Budget Transfer App? **No**

If yes, please answer questions below:

- What type of access do you need?
- What is the Division Code?
- What is the Div Set Code?
- What is the Division Org(s)?

**FOR ADDITIONAL INFORMATION OR QUESTIONS, CONTACT BUDGET@RICE.EDU OR SHERRI MILES AT X5986.**

### Finance Security Additional Comments

Enter any additional funds/orgs that don’t fit above. Any additional Finance access notes can also be entered here.

**FOR ADDITIONAL INFORMATION OR QUESTIONS, CONTACT BUDGET@RICE.EDU OR SHERRI MILES AT X5986.**
Option A gives access to the Payroll Transactions and Payroll History by FOAPAL – this is associated to the funds/orgs that are given in the Finance section above.

Option B gives access to the Payroll Transactions and Employee Information, including salary information. The Classes, Salary Range, and Home Org Range must all be entered.

Any additional HR/Payroll access notes can be entered here.
Option C is for users who need Web Time Entry access ONLY – no other HR security. If Option B is selected above this section does not need to be completed.
### Student System Data Access

<table>
<thead>
<tr>
<th>Are you requesting access to student records?</th>
<th>No</th>
</tr>
</thead>
</table>

If a user needs access to Student information select Yes and then enter a brief explanation of the type of access needed. The OTR will review and let OIT know what access is approved.

### Accounts Receivable System Data Access

<table>
<thead>
<tr>
<th>Are you requesting access to accounts receivable system data?</th>
<th>No</th>
</tr>
</thead>
</table>

If a user needs access to A/R or Cashier Office information select Yes and then enter a brief explanation of the type of access needed. The Cashiers Office will review and let OIT know what access is approved.

### Financial Aid System Data Access

<table>
<thead>
<tr>
<th>Are you requesting financial aid system data access?</th>
<th>No</th>
</tr>
</thead>
</table>

If a user needs access to Financial Aid information select Yes and then enter a brief explanation of the type of access needed. The Financial Aid Office will review and let OIT know what access is approved.

### UG Admission Data Access

<table>
<thead>
<tr>
<th>Are you requesting UG admission data access?</th>
<th>No</th>
</tr>
</thead>
</table>

If a user needs access to UG Admissions information select Yes and then enter a brief explanation of the type of access needed. The Admissions Office will review and let OIT know what access is approved.
8. After you click Submit, the application will be sent to the applicant's email. The applicant must read the Code of Responsibility and initial in three locations, and then sign to agree that they have read and understood.

9. Once the applicant has completed the form, it will be sent to the department approver's email you listed initially. When they have signed the application it will be automatically sent to the OIT Security Agreement Team.

If any questions regarding the process above, please email help@rice.edu.