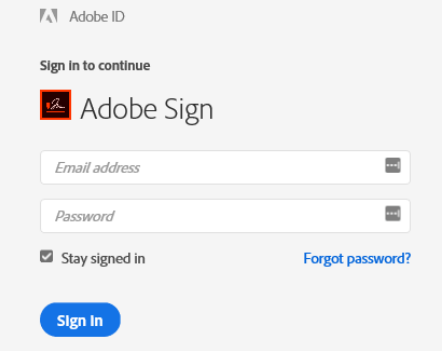
How to fill out the Edgar/Banner Security Agreement – Full Agreement

1. Go to the Adobe Sign home page: https://riceuniversity.na1.documents.adobe.com/account/home.



   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.

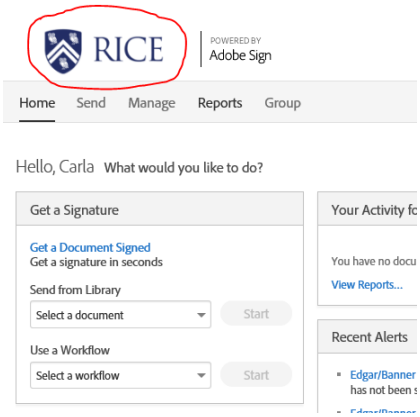
   c. Click on Sign In.

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

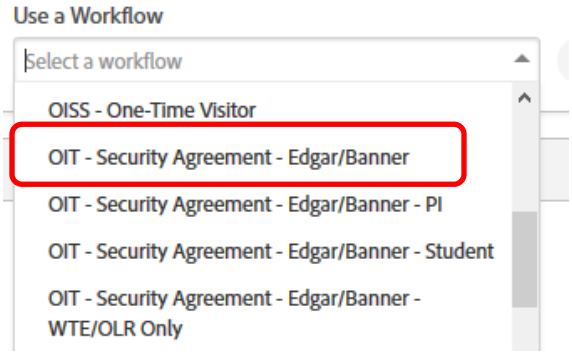
   a. Enter your Net ID and Net ID Password.

   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 Adobe Sign page, please send an email to help@rice.edu to request access to Adobe Sign.).

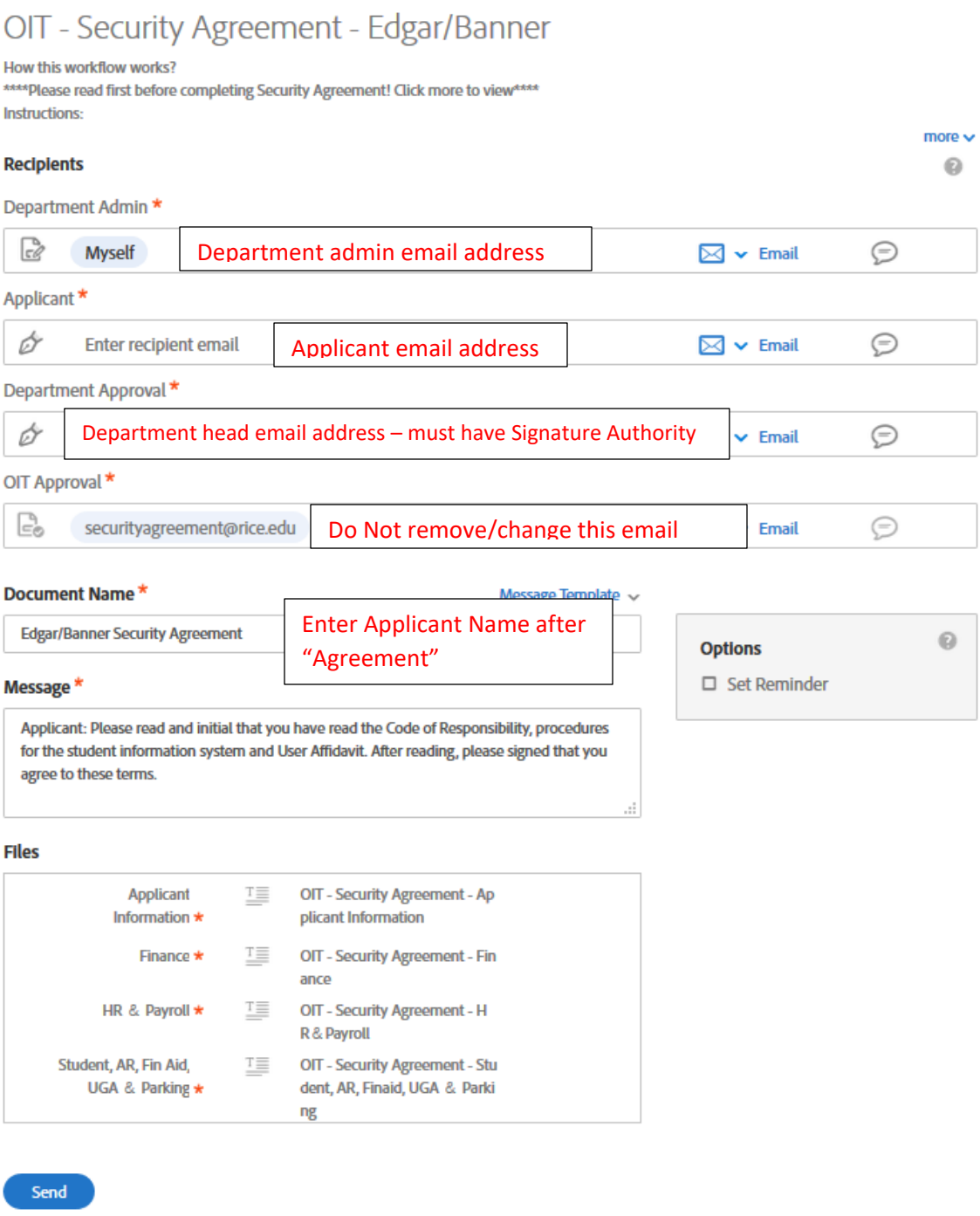


3. In the middle of the page, under the “Use a Workflow” menu, select the workflow "OIT – Security Agreement - Edgar/Banner” from the dropdown, then click Start. (If you do not see the "workflow drop down", please email help@rice.edu to request Adobe Sign access.).



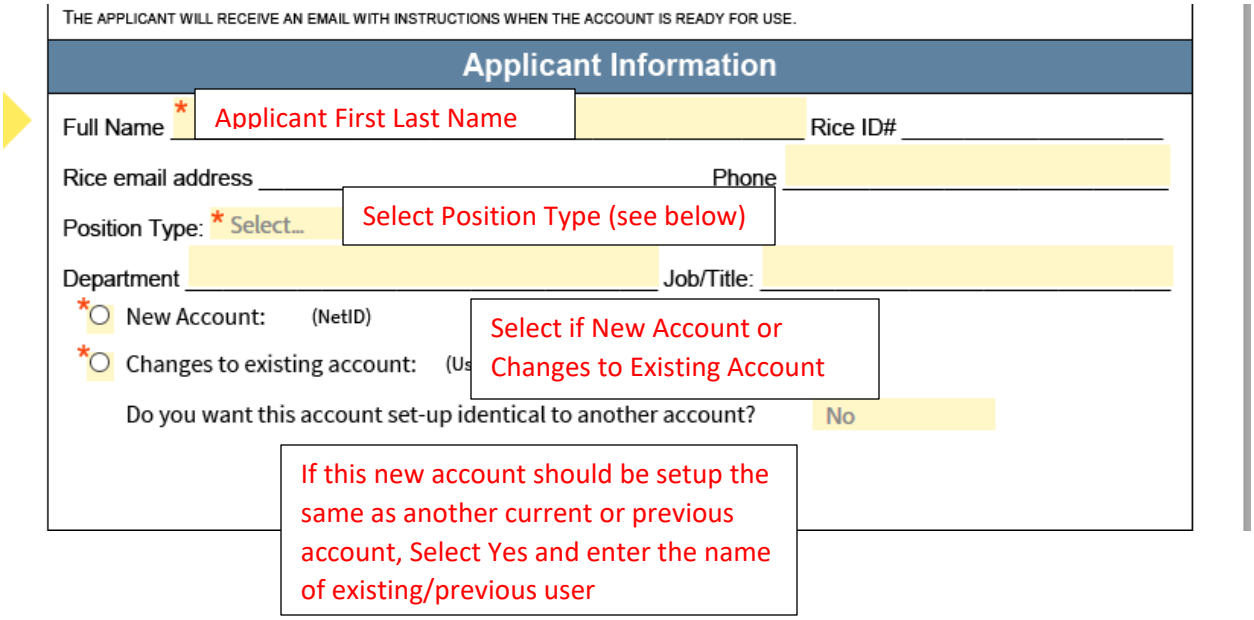
4. Enter the applicant and department approver Net ID Rice e-mail addresses. (**Note**: The department approver must have Signature Authority for the access that is being requested.).

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.).

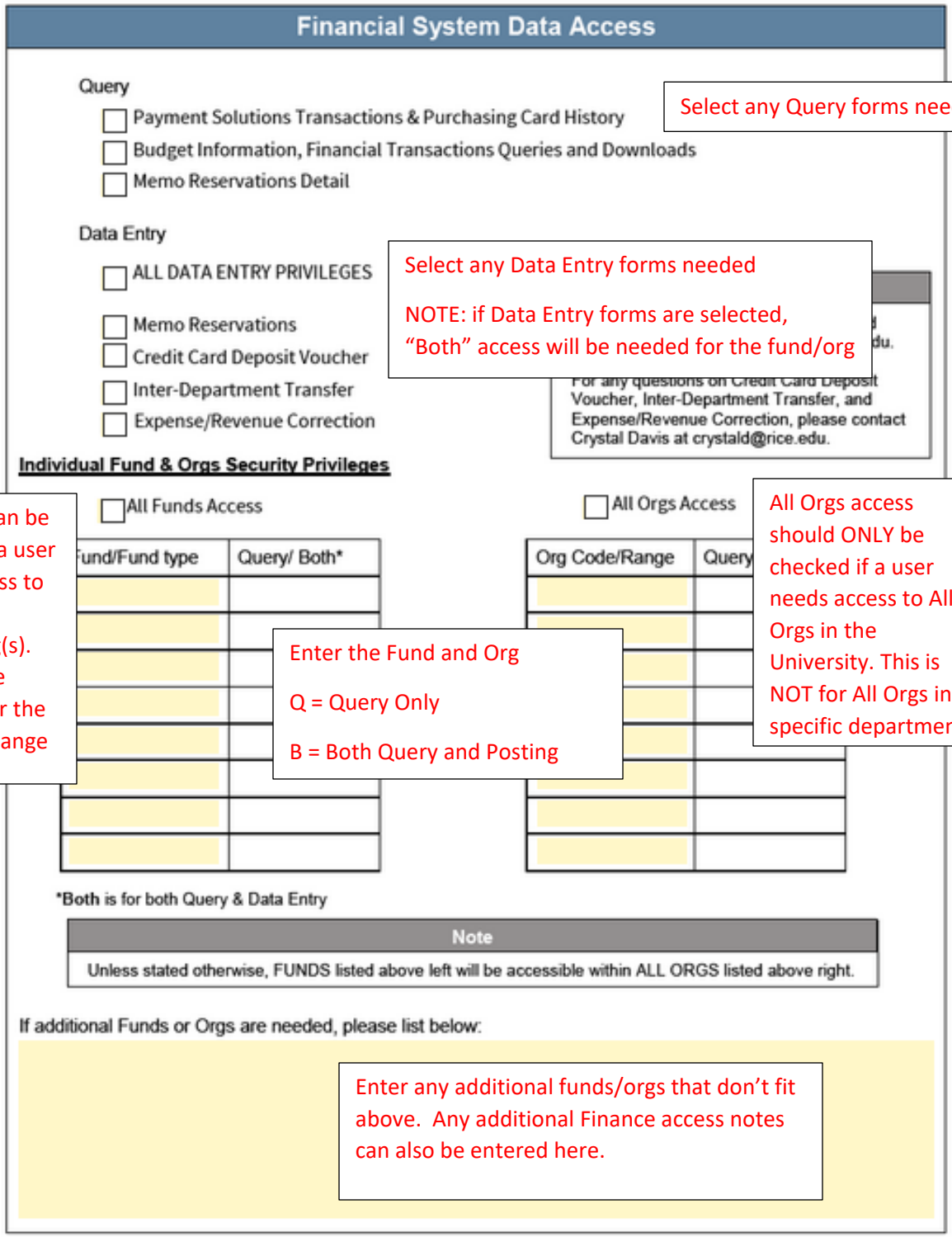


6. Click Send.

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.).



Position Types: Staff, Faculty, Temporary, Consultant, Student Worker


Financial System Data Access
Query
Payment Solutions Transactions & Purchasing Card History
Budget Information, Financial Transactions Queries and Downloads
Memo Reservations Detail
Select any Query forms needed
Data Entry
ALL DATA ENTRY PRIVILEGES
Memo Reservations
Credit Card Deposit Voucher
Inter-Department Transfer
Expense/Revenue Correction
Select any Data Entry forms needed
NOTE: if Data Entry forms are selected, "Both" access will be needed for the fund/org
For any questions on Credit Card Deposit Voucher, Inter-Department Transfer, and Expense/Revenue Correction, please contact Crystal Davis at crystald@rice.edu.
Individual Fund & Orgs Security Privileges
All Funds Access
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
All Orgs Access
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
Fund/Fund type
Query/ Both*
Org Code/Range
Query
Enter the Fund and Org
Q = Query Only
B = Both Query and Posting
*Both is for both Query & Data Entry
Note
Unless stated otherwise, FUNDS listed above left will be accessible within ALL ORGS listed above right.
If additional Funds or Orgs are needed, please list below:
Enter any additional funds/orgs that don't fit above. Any additional Finance access notes can also be entered here.

Financial System Data Access Cont.

Research Grants for Specific PI's

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

Name	Query/ Both*

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. **

Budget Transfer Access: If access is needed select Access Type and fill in the Division information requested.

** 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.

Human Resources and Payro

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.

Instructions: Please select from options A, B, or C.

☐ **Option A**
Applicant can **query and download** payroll related information for the **FUNDS/ORGS** listed in the **Individual Fund & Orgs Security Privileges** section. This includes Payroll by FOAPAL, Job Labor Distribution, Salary Encumbrance detail with Budget Info and Financial Transactions.

☐ **Option B**
Applicant can **query and download** HR/Payroll info by home org and/or employee class for the employee classes, salary ranges, and home orgs indicated below.

Employee Class (es)	Salary Range	Home Org Range
All	All	All (entire University)
Faculty	Specify Amount	Only Org(s) listed in table below
Staff		
Students		

From Home Org(s)	Through Home Org(s)

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.

** Continue to next page for option C **

Human Resources/Payroll comments related to Option A or Option B

Any additional HR/Payroll access notes can be entered here.

Human Resources and Payroll Data Access Cont.

☐ **Option C**
Web Time Entry Approvals ONLY (No other HR access)
****NOTE: If option B is completed, please do not complete this section.****

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.

Employee Class(es)

- All
- Faculty
- Staff
- Students

From Timesheet Org(s)	To Timesheet Org(s)

Student System Data Access

Are you requesting access to student records? No

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

Are you requesting access to accounts receivable system data? No

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

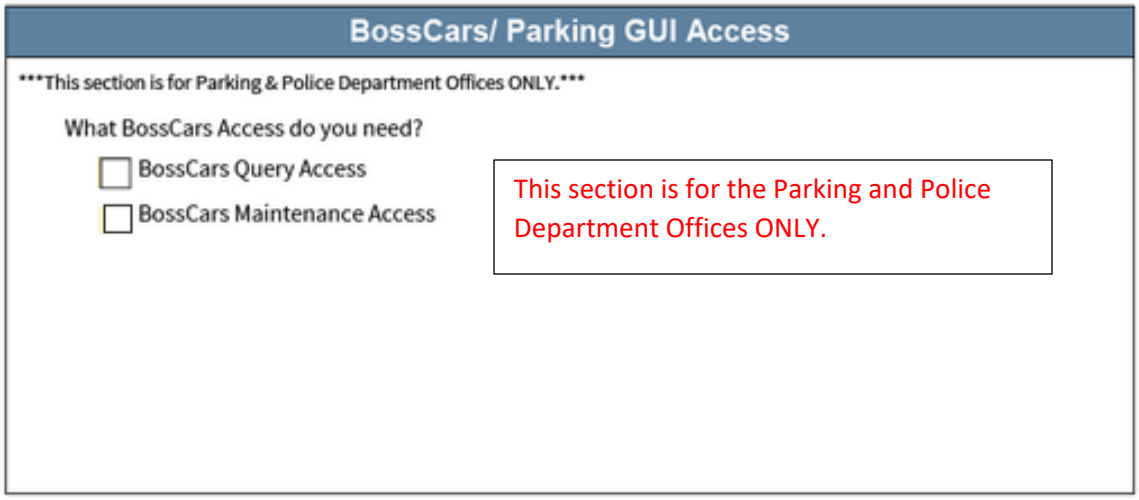
Are you requesting financial aid system data access? No

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

Are you requesting UG admission data access? No

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.