Create and Update a User with UDOC

This Quick Reference Guide shows how to set up a new AFIS User or update a User using the User Maintenance Document (UDOC). The UDOC contains required and optional information requested for User setup. For existing Users, use a UDOC to modify or remove AFIS permissions.

See User Roles and Permissions Quick Reference Guide for help researching Roles to assign to a User.

Required Attachments

All users must provide proof of training required for the Roles to be assigned. Some users must also provide signed GAO forms for particular Workflow assignments or multiple role combinations.

### Proof of Training

- Training Certificate if available, OR
- Screenshot of your Transcript from TraCorp

### Signed GAO-3DT

- Security Roles that approve Disbursements
  - DEPT_AP_APPR
  - DEPT_AP_MGR
  - GAO_AWR_MGR
  - GAO_GAAP_MGR
  - TRA_AP_MGR
- Security Roles that approve Transfers
  - DEPT_TRNF_MGR
  - DEPT_TRNF_OTHR
  - ADA/DTA_TRNF_APPR
- Invoice approvers in the Arizona Procurement Portal
  - APP_AP_SPVSR

### Signed GAO-3CSB

- If user is part of Central Services Bureau, AND
- User is assigned multiple AFIS system roles

Before setting up a User, confirm that the User has completed the required training and that you have the required certifications and Forms to attach.

**Procedure to Create a UDOC for a New User**

A. Log into AFIS.

B. Navigate to the UDOC documents in the document catalog.
   1. In the Jump to field, enter **UDOC**.
   2. Click Go.

C. Create a UDOC document.
   1. Click Create.
   2. In the Code field, enter **UDOC**.
   3. In the Dept. field, enter your department code.
Create and Update a User with UDOC

4. Enter a unique Document ID, using the user’s Last Name, First Initial, and a 1: SmithJ1.

D. Complete the Header component.

1. On the Header, select the Add radio button.
2. As User ID, enter the user’s EIN (or PIN).
3. On the Directory Information tab, enter the User’s Last Name and First Name (using Title Case: Smith, not smith or SMITH), Email Address, and Phone Number.
   Note: Email must be correct! It is used to notify the user of their User ID and password.

4. On the Home Organization tab, enter the User’s 3-character Department code.
5. On the Password Maintenance tab, select the Reset Password button. (Reset Password will prompt the user to set their own new password when they log into AFIS.)
6. In the Password field, enter Afis@1234.
7. On the Applications tab, check the ADVANTAGE Financial box for access to AFIS, and check the PASSWORD RESET box to allow the user to reset their password as desired.

E. Add Security Roles.

1. Select the Security Roles component.
2. Click Insert New Line at the bottom of the section.
3. Select the Add button.
4. Select the required Security Role ID for the User.
5. Enter a unique number as Precedence for the role. (AFIS does not use Precedence, but it must be unique. Use sequential numbers 1, 2, 3, etc. for each new role you add or update.
6. Repeat steps 2-5 to assign multiple security roles to a user.
Create and Update a User with UDOC

F. For approvers only! Add Workflow Roles.
   1. Select the Workflow Roles component.
   2. Click Insert New Line.
   3. Select the Add button.
   4. Select the correct Role ID for this manager.
   5. Check the Manager box to allow the User to Return Tasks (documents) to the Group Worklist from other Users’ Worklists in their absence.
   6. Display Sequence is required, but has no function in AFIS; you can leave the default at 1 for all Workflow Roles.
   7. Repeat steps 2-6 to assign multiple workflow roles to an approver.

G. Upload attachments required for roles, such as proof of training. Examples of required documents are listed in the box below.
   1. Click the File button on the bottom right of the screen.
   2. Select Attachments.
   3. Follow prompts to upload a file from a saved location.

H. Validate the UDOC document to check it for errors.
   1. Click the Validate button to check for errors.
   2. Fix any errors such as missing values in required fields, and Validate again.
   3. If validation is successful, a message is displayed: “Document validated successfully.”

I. Submit the UDOC once the document has successfully validated.
   1. Click the Submit button.
   2. Confirm the document is in Pending phase.
   3. Click Home in the Primary Navigation Panel to return to the Home Page.

Procedure to Update User Permissions

A. Log into AFIS.

B. Navigate to the UDOC page.
   1. In the Jump to field, enter UDOC.
   2. Click Go.

C. Create a UDOC document.
   1. Click Create.
   2. In the Code field, enter UDOC.
   3. In the Dept. field, enter the user’s department code.
4. Enter a unique Document ID, using the user’s Last Name, First Initial, and the next sequential number for the User’s UDOCs: SmithJ2.


D. Complete the Header by selecting the User to update.

1. On the Header component, select the Update radio button.
2. In the User ID field, enter the user’s EIN number or use the picklist to locate the User ID.
3. Click Populate From Existing User to fill in the current assignments for the user.

E. Complete the Security Roles.

1. To ADD a Security Role
   a. Click the Insert New Line button.
   b. On the new blank line, select the Security Role from the dropdown.
   c. Add a unique Precedence number.
2. To REMOVE a Security Role,
   a. Click the line with the Security Role to delete.
   b. Click the Action button to Delete. (The Trash icon does not delete; see Helpful Hints.)
   c. Type a Revoke Reason to explain why the role is being removed.

Never UPDATE a Security Role! Add needed Security Roles; Delete unneeded Security Roles.

F. For approvers only! Complete Workflow Roles.

1. To ADD a Workflow Role:
   a. Click Insert New Line at the bottom of the section.
   b. Select the Add button.
   c. In the Role ID field, select the Workflow Role to add.
   d. Check the Manager box to allow a User to manage the worklist.
   e. Display Sequence is required; you can leave the default at 1.
   f. Repeat steps 2-6 to assign multiple workflow roles to an approver.
2. To REMOVE a Workflow Role,
   a. Click on the line with the Workflow Role to delete.
   b. Click the Action radio button to Delete (not the Trash icon; see Helpful Hints below.)
   c. Type a Revoke Reason to explain why the role is being removed.
3. To UPDATE a Workflow Role (for changing the Manager setting),
   a. Click on the line with the Workflow Role to update.
   b. Click the Action radio button to Update.
c. Check or uncheck the Manager box.

G. Upload attachments required for roles, such as proof of training.  
   (See section above for Required Attachments.)
   1. Click the File button on the bottom right of the screen.
   2. Select Attachments.
   3. Follow prompts to upload a file from a saved location.

H. Validate the UDOC document to check it for errors.
   1. Click the Validate button to check for errors.
   2. Fix any errors such as missing values in required fields, and Validate again.
   3. If validation is successful, a message is displayed: "Document validated successfully."

I. Submit the UDOC once the document has successfully validated.
   1. Click the Submit button.
   2. Confirm the document is in Pending phase.
   3. Click Home in the Primary Navigation Panel to return to the Home Page.

**Helpful Hints**

*Use Delete Button, not the Trash Can Icon to Remove a Role*

On a UDOC for a new user, lines that you added (in order to insert a new Role) have Copy Line and Delete Line (trash symbol) icons. Select the Delete Line icon if you need to remove a line that you inserted in error, so that it will not update the User’s profile.

On a UDOC to Update a User, after selecting Populate From Existing User to load existing Roles, Delete Line (trash) only removes a line from the current UDOC. It does NOT delete the actual Security or Workflow Role from the User’s Permissions. To delete a role from the User’s Permissions, you must select Delete from the Add/Update/Delete radio buttons.

**Common Mistakes**

Here are some of the most common mistakes that cause an Approver to reject a UDOC.

- Not using Populate From Existing User when updating a current users account
- Not attaching required training certifications or GAO forms
- Forgetting to check the Manager checkbox for the assigned workflow roles
- Mistakenly using the trash icon to delete a user’s role: Use the Delete radio button instead
- Mistakenly typing over the top of an existing record to add a role: Use Insert Line instead