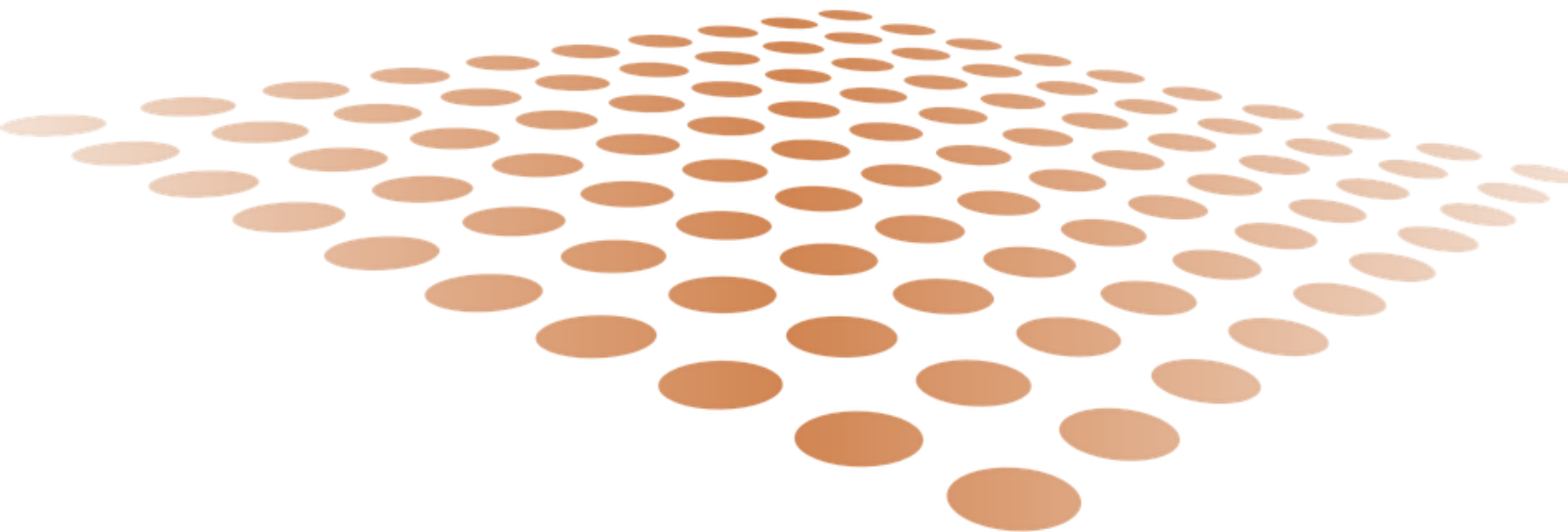# AFIS

ARIZONA FINANCIAL INFORMATION SYSTEM

ADOA – General Accounting Office

QUICK REFERENCE GUIDE:
USER ROLES AND PERMISSIONS

USER ROLES AND PERMISSIONS

User Roles and Permissions

This Quick Reference Guide explains two infoAdvantage reports that display the User Roles assigned to Users, and the permissions allowed to each User Role. Both reports are available as On-Demand reports to be run by an Interactive User of infoAdvantage (**with Security Role INFO_INTRCT**).

FIN-AZ-SEC-N346 Security Listing by Department

FIN-AZ-SEC-N346 Security Listing by Department provides a complete list of your department's AFIS Users and their assigned Security and Workflow Roles. Enter your Department in the Prompt to see assignments of Users to Security and Workflow Roles. An additional column shows the User's Last Password Change Date.

In this report, Workflow Roles do not always correspond to Security Roles; they are separate lists that are shown in side-by-side columns across multiple rows for a single User.

The screenshot (with user names blanked out) illustrates several points:

1. The basic read-only user in AFIS is assigned the **System Role: Inherited by all users** (also known as the ANY role)

2. Many users have multiple Security Roles

3. Some users have Workflow Roles, others do not

4. One user does not currently have any Security or Workflow Roles assigned in AFIS

5. Workflow Roles may repeat for the same User; you can ignore the repeated Roles

You can use this report to answer questions such as the following:

- Abigail will be leaving her current position soon. What Roles did she have, and who else has the same Roles? Will I need to assign someone else to those Roles?

- Bradley, a Budget Approver, is going on leave for 3 months. Who else already has the Budget Approver role?

- We are re-organizing the Accounts Payable processes. Which users have the Department's Accounts Payable Analyst role?

Security Roles and Workflow Roles

Security Roles determine what pages and documents a User can access; Workflow Roles determine who can approve Documents that require a specific type of approval.

Changes to Roles

To make changes to an AFIS User's Security Roles and Workflow Roles, enter a UDOC following the process in the *Create and Update a User with UDOC QRG*.

FIN-AZ-SEC-N350 System Access by Security Role

Use this report to see the permissions for each Security Role in AFIS. Select a Security Role at the Prompt; then see which Pages and Documents a user with that Security Role can access and what the user can do on that page.

The screenshots below show a subset of Pages and Documents that can be accessed by a user with the Security Role DEPT_AP_ANLST.

Report ID: FIN-AZ-SEC-N350
Run Date: 10/29/2015
Run Time: 8:08 AM

Parameters and Prompts
User Role(s):   DEPT_AP_ANLST

Report ID: FIN-AZ-SEC-N350
Run Date: 10/29/2015
Run Time: 8:08 AM

State of Arizona
System Access by Security Role

Page/Doc	Page Type	Page/Doc Desc	Schedule	Activate	Open	Save	Edit	Insert Line	Delete Line	New	Discard	Validate	Submit	Approve	Reject	Reassign	Bypass Approvals	Hold Document	Apply Overrides	Import	Export
AD	Document	Automated Disbursement	X		X	X	X				X	X	X							X	X
DRM	Document	Disbursment Request Modification	X	X	X	X	X			X	X	X	X							X	X
EAMD	Document	Expense Adjustment Manual Disbursement	X	X	X	X	X			X	X	X	X							X	X
EFT	Document	Electronic Funds Transfer	X		X	X	X				X	X	X							X	X
GAE	Document	General Accounting Encumb	X	X	X	X	X			X	X	X	X							X	X

Use this report (in combination with N346) to answer questions such as:

1. Carlos can open the document, but can't discard it. Is that correct?
2. Can Betty create a new EFT document?

Further References

For help with creating a UDOC, see *Create and Update a User with UDOC QRG*.

For help with running an interactive report, see *Run an Interactive infoAdvantage Report QRG*.

For help with Workflow Roles that match Security Roles, contact your Agency Coordinator to obtain the *Published Role Definition and Role Assignment Review Report.xlsx* that is published regularly to Agency SharePoint.