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 YES

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

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.

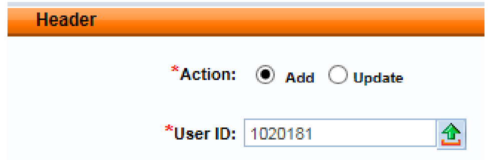
1. In the Jump to field, enter ***UDOC***.
2. Click **Go**.

C. Create a UDOC document.

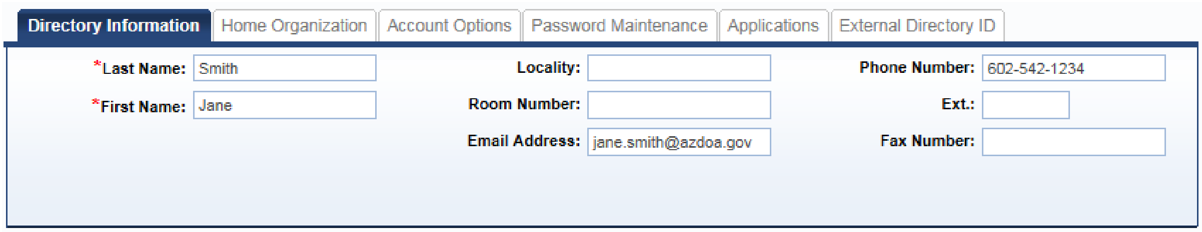
1. Click **Create**.
2. In the Code field, enter ***UDOC***.
3. In the Dept. field, enter ***your department code***.

4. Enter a unique Document ID, using the user's Last Name, First Initial, and a 1: ***SmithJ1***.
5. Click **Create**. AFIS generates a new document as Ver: 1, Function: New, Phase: Draft.

D. Complete the Header component.

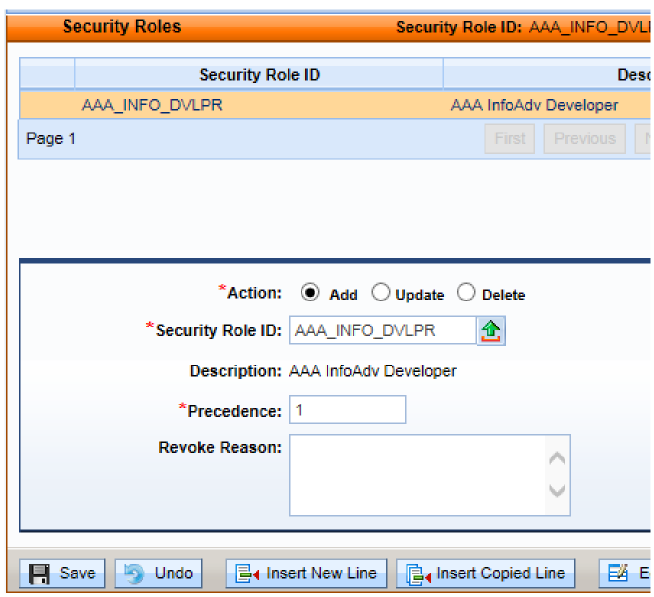


1. On the Header, select the **Add** radio button.
2. As ***User ID***, enter the user's EIN (or PIN).
3. On the Directory Information tab, enter the User's ***Last Name*** and ***First Name*** (using Title Case: ***Smith***, not smith or SMITH), ***Email Address***, and ***Phone Number***.
   Note: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



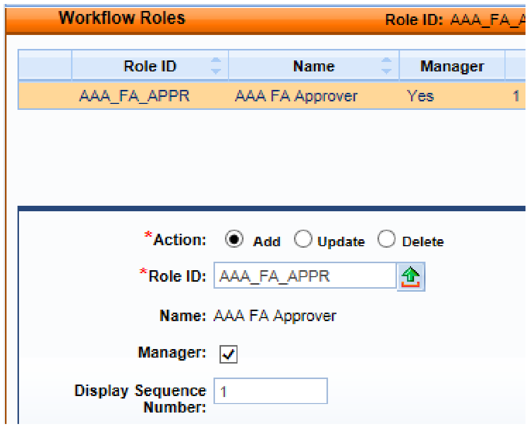
4. On the Home Organization tab, enter the User's 3-character ***Department*** code.
5. On the Password Maintenance tab, select the **Reset Password** button. (Reset Password will prompt the user to set their own new password when they log into AFIS.)
6. In the Password field, enter ***Afis@1234***.
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.



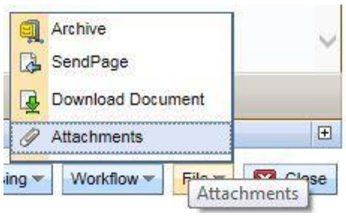
1. Select the Security Roles component.
2. Click **Insert New Line** at the bottom of the section.
3. Select the **Add** button.
4. Select the required ***Security Role ID*** for the User.
5. Enter a unique number as ***Precedence*** for the role. (AFIS does not use Precedence, but it must be unique. 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.

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 not 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.

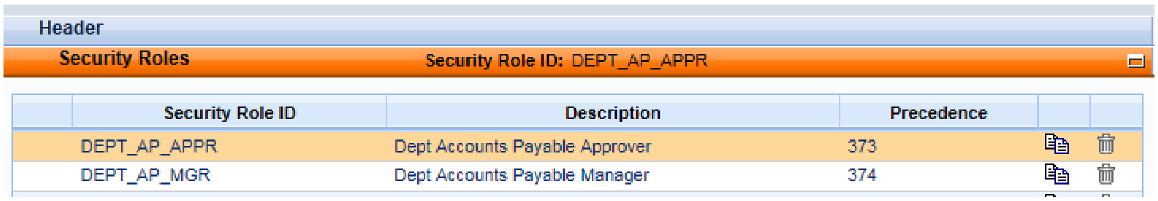
1. Click **Create**.
2. In the Code field, enter ***UDOC***.
3. In the Dept. field, enter the ***user's department code***.

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***.
5. Click **Create**. AFIS generates a new document as Ver: 1, Function: New, Phase: Draft.

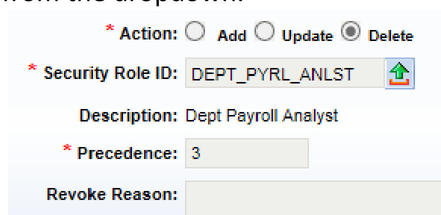
D. Complete the Header by selecting the User to update.

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.



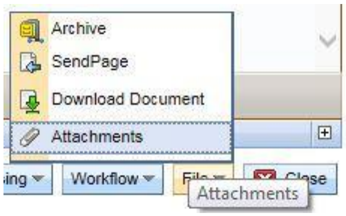
Never **UPDATE** a Security Role! **Add** needed Security Roles; **Delete** unneeded Security Roles.

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.)



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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