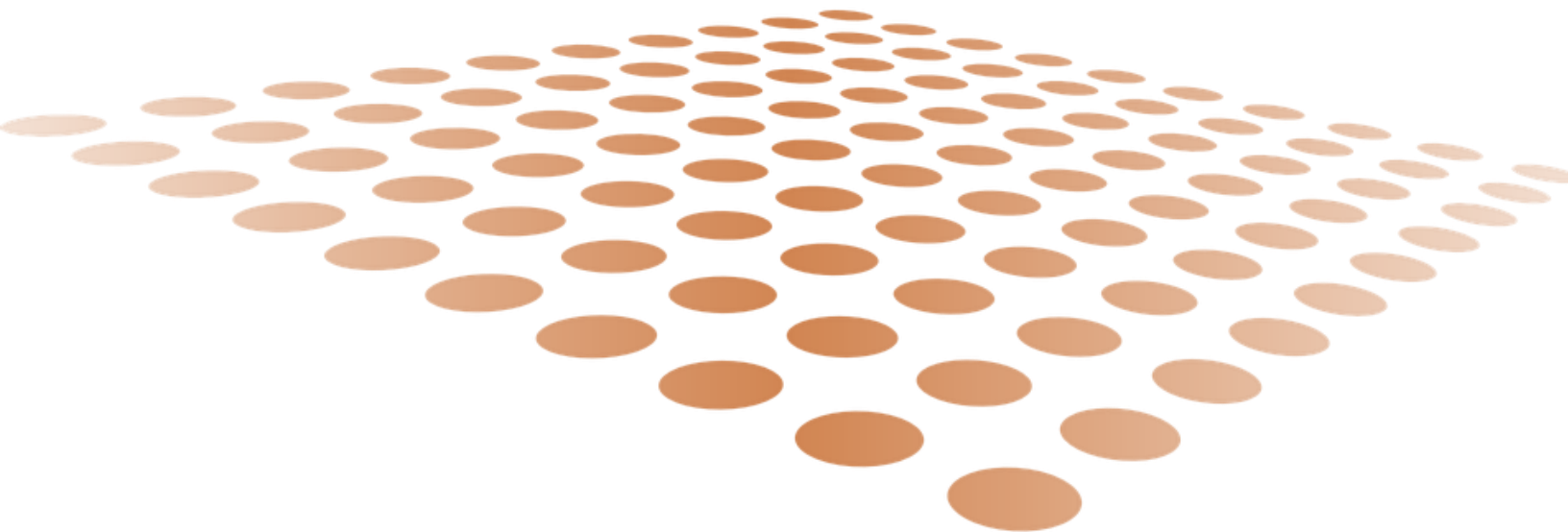


ADOA – General Accounting Office

# 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.

Report ID: FIN-AZ-SEC-N346		State of Arizona				
Run Date: 10/29/2015		Security Listing by Department				
Run Time: 7:53 AM						
Department	Last Name	First Name	User ID	Security Role	Workflow Role	Last Password Change Date
IDA			20781	External Transfer, must add DEPT_TRNF_J	IDA Vendors Approver	09/09/2015
			20781	IDA InfoAdv 1009AP	IDA Vendors Approver	09/09/2015
			20781	IDA InfoAdv Payroll	IDA Vendors Approver	09/09/2015
			20781	Internal Transfer, must add DEPT_TRNF_C	IDA Vendors Approver	09/09/2015
			20781	System Role: Inherited by all users	IDA AP Approver	09/09/2015
			37220	Dept Fixed Assets Analyst		09/09/2015
			37220	System Role: Inherited by all users		09/09/2015
			31703	Department Payment Planning Analyst	IDA GL/TRNF Approver	08/14/2015
			31703	Dept Accounts Payable Approver	IDA AR Approver	08/14/2015
			31703	Dept Accounts Receivable Manager	IDA Budget Approver	08/14/2015
			31703	Dept Budget Manager	IDA GL/TRNF Approver	08/14/2015
			31703	Dept Payroll Analyst	IDA GL/TRNF Approver	08/14/2015
			31703	External Transfer, must add DEPT_TRNF_J	IDA GL/TRNF Approver	08/14/2015
			31703	Internal Transfer, must add DEPT_TRNF_C	IDA GL/TRNF Approver	08/14/2015
			31703	System Role: Inherited by all users	IDA AP Approver	08/14/2015
			31399			08/09/2015
			41277	Dept Accounts Payable Analyst		08/09/2015

The screenshot above (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:

1. 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.

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

Report ID: FIN-AZ-SEC-N350		State of Arizona																				
Run Date: 10/29/2015		System Access by Security Role																				
Run Time: 8:08 AM		Parameters and Prompts																				
		User Role(s): DEPT_AP_ANLST																				
Page/Doc	Page Type	Page/Doc Desc	Schedule	Activate	Open	Save	Edit	Insert Line	Delete Line	New	Discard	Validate	Submit	Approve	Reject	Reassign	Approvals	Document	Apply Overrides	Import	Export	
AD	Document	Automated Disbursement	X		X	X	X				X	X	X								X	X
DRM	Document	Disbursement 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

- Carlos can open the document, but can't discard it. Is that correct?
- 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.