



ADOA – General Accounting Office

QUICK REFERENCE GUIDE: CREATE & UPDATE A USER WITH UDOC





CREATE & UPDATE A USER WITH UDOC

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CREATE & UPDATE A USER WITH UDOC

Overview

This quick reference guide (QRG) shows how to set up a new AZ360 Financial user or update a user using the User Maintenance (UDOC) transaction. The UDOC contains required and optional information for user setup. For existing users, use a UDOC to modify or remove AZ360 Financial 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 General Accounting Office (GAO) forms for particular workflow assignments or multiple role combinations.

Proof of Training	Signed GAO-3DT	Signed GAO-3CSB
<ul style="list-style-type: none"> • Training Certificate if available, <i>or</i> • Screenshot of Transcript from TraCorp 	<ul style="list-style-type: none"> • Security Roles that approve disbursements: <ul style="list-style-type: none"> • DEPT_AP_APPR • DEPT_AP_MGR • GAO_AWR_MGR • GAO_GAAP_MGR • TRA_AP_MGR • Security Roles that approve transfers: <ul style="list-style-type: none"> • DEPT_TRNF_MGR • DEPT_TRNF_OTHR • ADA/DTA_TRNF_APPR • Invoice approvers in the Arizona Procurement Portal <ul style="list-style-type: none"> • APP_AP_SPVSR 	<ul style="list-style-type: none"> • If user is part of Central Services Bureau, <i>and</i> • User is assigned multiple system roles

Before setting up a user, confirm that the user completed the required training and that the user has the required certifications and forms to attach.



Create a UDOC for a New User

Log in to AZ360. Navigate to the UDOC transactions in the transaction catalog.

1. Click the **Expand** caret next to the **Global Search** field.
2. Select the **Page Code** option.
3. In the **Global Search** field, enter *UDOC*.
4. In the drop-down menu that generates, select **UDOC User Maintenance**. The UDOC Financial Transaction page will generate.

Create a UDOC transaction.

1. Click **Create**.
2. The **Transaction Code** field infers **UDOC**.
3. In the **Transaction Dept** field, enter the user's department 3-digit code.
4. Enter a unique Transaction ID, using the user's last name, first initial, and a "1".
 - a. For example, the first UDOC for John Smith would be labeled as SMITHJ1.
5. Click **Continue**. AZ360 Financial generates a new transaction. Note that the transaction is in **Draft**, the **Version** number is **1**, and the **Function** is **New**.

Complete the **Header** tab.

1. The **Action** field defaults to **Add**.
2. In the **User ID** field, enter the user's employee identification number (EIN) or personal identification number (PIN).

Complete the **Directory Information** section.

1. In the **Last Name** field, enter the user's last name (using title case: **Smith**, not smith or SMITH).
2. In the **First Name** field, enter the user's first name.
3. In the **Email Address**, enter the user's email address.

Note: Email must be correct. It is used to notify the user of the user ID and password.

4. In the **Phone** field, enter the user's phone number. In the **Extension** field, enter the extension.



Complete the **Home Organization** section.

1. In the **Department** field, enter the user's 3-digit department code.

Complete the **Password Maintenance** section.

1. Select the **Reset Password** checkbox.
2. In the **Password** field, enter **Az360@1234**.

The password must entered exactly as written above. Password must have at least one (1) upper and one (1) lower case letter.

Complete the **Applications** section.

1. Select the **ADVANTAGE Financial** checkbox for access to AZ360 Financial.
2. Select the **PASSWORD RESET** checkbox to allow the user to reset the password as desired.

∨ Applications - Select ADVANTAGE Financial and PASSWORD RESET

<input checked="" type="checkbox"/> ADVANTAGE Financial	<input type="checkbox"/> ADVANTAGE HR
<input type="checkbox"/> ADVANTAGE VSS	<input type="checkbox"/> VSS Password Reset
<input type="checkbox"/> ADVANTAGE Administrator	<input checked="" type="checkbox"/> PASSWORD RESET

3. Click the **Security Roles** tab.

Add Security Roles

Complete the **Security Roles** tab.

1. Click the + button to insert a new security role.
2. From the **Security Role** picklist, select the required security role ID for the user.
3. In the **Precedence** field, enter a unique number for the role. Use sequential numbers (e.g., 1, 2, 3, etc.) for each new role added or updated.

Repeat steps 1-3 to assign multiple security roles to a user.

4. Click the **Business Roles** tab.



Add Business Roles

Complete the **Business Roles** tab.

1. Click the **+** button to insert a new business role.
2. From the **Business Role ID** picklist, select the correct business role ID.
3. Determine if this is a primary business or secondary business role. There can only be one primary business role assigned.
 - a. If this is the **primary** business role, select **Yes** from the **Primary** dropdown.
 - b. If this is a **secondary** business role, select **No** from the **Primary** dropdown.
4. For secondary business roles, in the **Display Order** field, enter the order in which the roles should be displayed using sequential numbers (e.g., 1, 2, 3, etc.).

*Action	*Business Role ID	Business Role Name	Business Role Description	Primary	*Display Order	User Type	Attachments
Add	501	Employee	Employee Role Description WIP	Yes	0	-Select-	
Add	502	Manager	Manager Role Description WIP	No	1	-	
Add	300001	System Administration	This role contains all of the configuration and inquiry pages for managing the CGI Advantage ERP.	No	2	-	
Add	400000	Vendor	Vendor	No	3	-	

5. If adding or updating an Approver/Manager account, click the **Workflow Roles** tab.
 - a. If **not** adding or updating an Approver/Manager account, continue to the *Upload Attachments and Validate and Submit UDOC Transaction* section.

Add Workflow Roles (Approvers/Managers Only)

Complete the **Workflow Roles** tab.

1. Click the **+** button to insert a new workflow role.
2. From the **Role ID** picklist, select the correct role ID for this manager.
3. Select **Yes** from the **Manager** dropdown to allow the user to return tasks (i.e., transactions) to the group worklist from other users' worklists in their absence.
4. The **Display Sequence** field is required, but has no function in AZ360; the user can leave the default at **1** for all workflow roles.




Repeat steps 1-4 to assign multiple workflow roles to an approver.

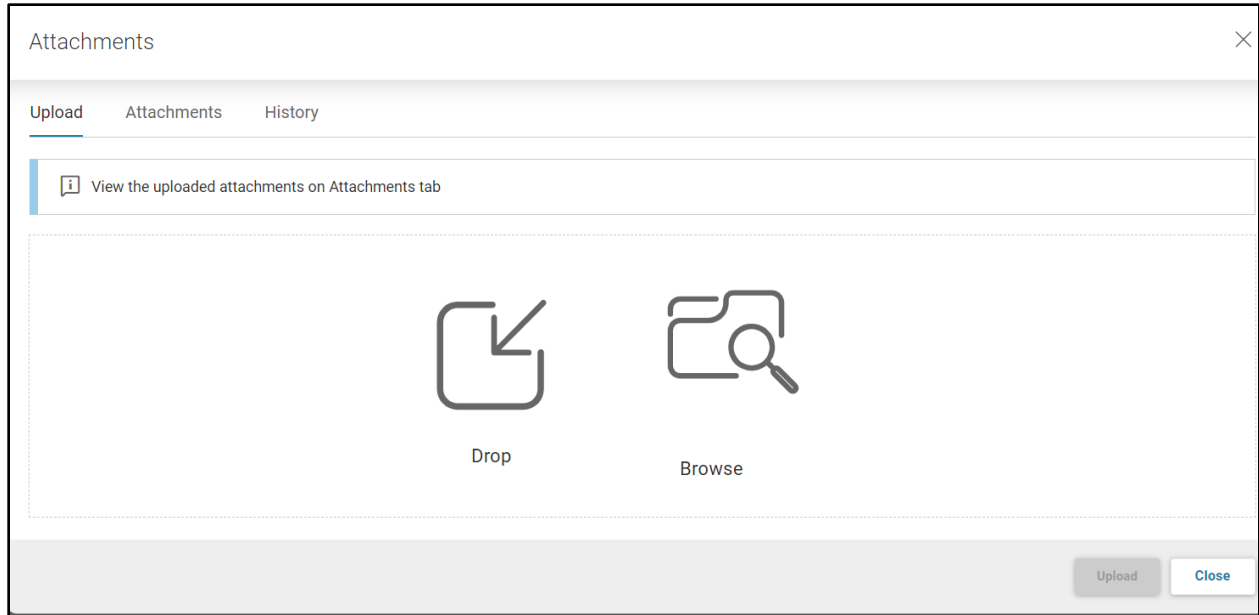
Upload Attachments and Validate and Submit UDOC Transaction

Upload attachments required for roles, such as proof of training.

1. Click the **Security Roles** tab.
2. Select the **Paperclip** icon under **Attachments**.

Security Role ID	Business Role ID	Role ID	Attachments
ADA_TRNF_APPR	-	-	

3. Upload the document.
 - a. Either drag and drop in an attachment or click **Browse** to add an attachment.
 - b. Click **Upload**.
 - c. When all attachments are uploaded, click **Close**.



Validate the UDOC transaction to check it for errors.

1. Click the **Validate** button to check for errors. Fix any errors such as missing values in required fields and validate again.
 - a. If validation is successful, a message is displayed: **Transaction validated successfully.**

Submit the UDOC once the transaction has successfully validated.

1. Click **Submit**.
2. Confirm the transaction is in **Pending** phase.
3. Click the **Home** icon to return to the Home Page.



Update User Permissions

Log in to AZ360. Navigate to the UDOC transactions in the transaction catalog.

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Create a UDOC transaction.

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4. Enter a unique Transaction ID, using the user's last name, first initial, and a "1".
 - a. For example, the first UDOC for John Smith would be labeled as SMITHJ1.
5. Click **Continue**. AZ360 Financial generates a new transaction. Note that the transaction is in **Draft**, the **Version** number is **1**, and the **Function** is **New**.

Complete the **Header** tab.

1. In the **Action** field, select **Update**.
2. In the **User ID** field, enter user's employee identification number (EIN) or personal identification number (PIN).
3. Click the **Header** tab's 3-dot menu and click **Populate From Existing User** to fill in the current assignments for the user.

Complete the Security Roles/Business Roles/Workflow Roles tabs for the changes needed.

Add a Role

1. Click the roles tab (e.g., Security, Business, or Workflow) where the addition is to be made.
2. Click the **+** to insert a new line.



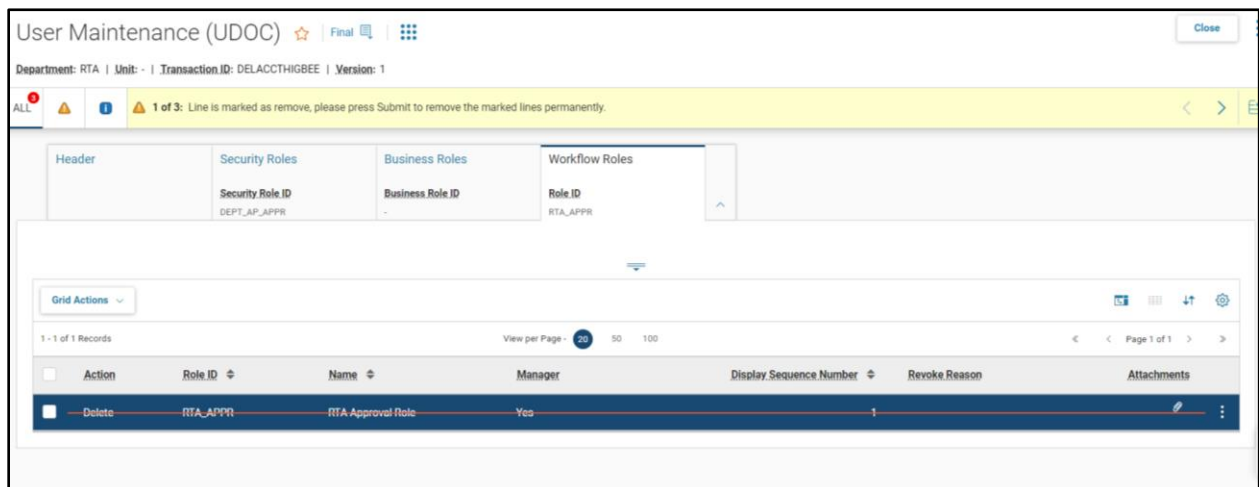
3. On the new blank line:
 - a. For a new **security role**:
 - Select the security role ID from the **Security Role ID** picklist.
 - Add a unique number in the **Precedence** field.
 - b. For a new **business role**:
 - Select the business role ID from the **Business Role ID** picklist.
 - Determine if this is a primary business role or secondary.
 - For secondary business roles, enter a display order.
 - c. For a new **workflow role** (only for managers):
 - Select the role ID from the **Role ID** picklist.
 - Select **Yes** or **No** from the **Manager** dropdown.
 - Enter a display sequence number.

Upload attachments required for roles, such as proof of training. See section above for *Required Attachments*.

Remove a Role

1. Select the checkbox for the line with the role to delete.
2. Type a description for the why the role is to be removed in the **Revoke Reason** field (if applicable).
3. Click the line’s 3-dot menu and click **Remove**.
4. Line is marked as remove.

Transaction will need to be submitted to remove the marked lines permanently.





Validate the UDOC transaction to check for errors.

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Submit the UDOC once the transaction has successfully validated.

1. Click **Submit**.
2. Confirm the transaction is in **Pending** phase.
3. Click the **Home** icon to return to the Home Page.

Helpful Hints

- On a UDOC for a new user, lines that the user added (in order to insert a new role) have Copy Line and Delete Line (trash symbol) icons. Select the **Delete Line** icon if the user needs to remove a line that the user 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, the user must select **Remove** from the 3-dot menu.

Common Mistakes

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

- Users do **not** use the **Populate From Existing User** option when updating a current user's account.
- Users do **not** attach required training certifications or GAO forms.
- Users do **not** select **Yes** in the **Manager** dropdown for the assigned workflow roles.
- Users mistakenly use the trash icon to delete a user's role.
 - **Use the Remove option in the 3-dot menu instead.**
- Users mistakenly type over the top of an existing record to add a role.
 - **Use Insert Line (+) instead.**