Quick Reference Guide: *Access & Training Requirements*

Fiscal Roles (including SpeedType Fiscal Staff Approver)

Certain roles require you to have a fiscal role on a SpeedType, as detailed below. Complete the ChartField Request: SpeedType, Program, Subclass form – or, email your campus finance office with the SpeedType number, fiscal role, employee's name, and position number.

Boulder finance office   Denver & Anschutz Medical Campus finance office   Colorado Springs finance office   System Administration finance office

Cognos Reporting System

You are authorized to run reports in the Cognos Reporting System if you have a fiscal role on a SpeedType, or if you have access to the PeopleSoft Finance System.

Your campus finance office may offer in-person training on reading reports – see campus links above for details.

Role	Course	Course #
Running m-Fin Reports	• Cognos Reporting System: m-Fin Reports (recommended)	U00085

Commercial Cards (Procurement Card and Travel Card)

Role	Course	Course #	Access Request Form
Procurement Card Cardholder	• Procurement – Purchasing & Contract Management	A00109	Cardholder Application – Procurement Card
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)	
	• Procurement Card Cardholder Training	U00053	
	• Concur – Reconciling Procurement Card (recommended)	U00093	
Travel Card Cardholder	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)	Cardholder Application – Travel Card
	• Travel and Travel Card Training	U00078	
	• Concur – Reconciling Travel (recommended)	U00094	
Procurement Card Approving Official	• Procurement – Purchasing & Contract Management	A00109	Approving Official Application/Update
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)	
	• Procurement Card Approving Official Training	A00025	

Concur Travel & Expense System

Every employee – or Type 15/31 POI – has access to the Concur Travel & Expense System. To approve Travel Reconciliation (employee reimbursement) expense reports, you must be either an HR Supervisor, or have a fiscal role of org/program/project principal or manager on a SpeedType, or be listed as SpeedType Fiscal Staff Approver. To approve Procurement Card expense reports, you must be the cardholder's Procurement Card Approving Official.

Role	Course	Course #
Booking travel (including travel arrangers)	• Concur – Booking Travel (recommended)	U00092
Reconciling travel expenses/reimbursing employees (including delegates)	• Concur – Reconciling Travel (recommended)	U00094
Reconciling Procurement Card expenses (including delegates)	• Concur – Reconciling Procurement Card (recommended)	U00093

CU Marketplace

Refer to the [Financial Systems Access Request Form](#) for role details and to request access.

Role	Course	Course #
Inquiry only	• Information Security and Privacy	U00063
Fiscal Approver (including with Incompatible Access) *Must also have fiscal role (except Officer) on SpeedType*	• Information Security and Privacy	U00063
	• Procurement – Purchasing & Contract Management	A00109
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• CU Marketplace – Approver	U00081
Invoice/Match Exception Approver *Must also have fiscal role (except Officer) on SpeedType*	• Information Security and Privacy	U00063
	• Procurement – Purchasing & Contract Management	A00109
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• CU Marketplace – Invoice/Match Exception Approver	U00091
Receiver	• Information Security and Privacy	U00063
	• Procurement – Purchasing & Contract Management	A00109
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• CU Marketplace – Receiver	U00090
Requestor	• Information Security and Privacy	U00063
	• Procurement – Purchasing & Contract Management	A00109
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• CU Marketplace – Requestor	U00084
Shopper	• Information Security and Privacy	U00063
	• CU Marketplace – Shopper (recommended)	U00080

Gift Fund (Fund 34 SpeedType)

Role	Course	Course #
Fiscal Role on a Fund 34 SpeedType	• Gift Fund Management – Beginner Course (not required for individuals responsible for managing gift funds received from blended organizations (e.g., UPI) as part of a contract)	U00082
Create or Approve Fund 34 Journal Entries (JEs)…or involved in daily operations of Gift Fund SpeedTypes	• Gift Fund Management – Advanced Course (recommended) *Also see PeopleSoft Finance System section, below.*	U00083

PeopleSoft Finance System

Refer to the [Financial Systems Access Request Form](#) for role details and to request access.

Role	Course	Course #
Inquiry only	• Information Security and Privacy	U00063
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• Financials – Inquiry	A00105
Create or Approve Journal Entries (JEs)	• Information Security and Privacy	U00063
	• Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers)	F00001 (or F00002)
	• Financials – Inquiry	A00105
	• Financials – General Ledger	A00106
	• **In-person** Financial Inquiry	A00101
	• **In-person** Financial – General Ledger	A00102