

FIN How-to: Looking Up Finance System Roles ^[1]

Do you have a question about someone's roles in the Finance System? Maybe you want a new hire to have the same access as another member of your team ... but you don't know what that means or what roles to request. In FIN, you can look up a person's roles to answer those questions.

Watch the Video

Read the Procedures

1. Log into the Finance System.
2. From the **Finance & Accounting** homepage, click on the **User Profiles** tile.
3. On the Find an Existing Value tab, click on **Show more options**.
4. Now you can look up someone by their user ID or their name.
5. Use the **Description** field to look up by last name.
6. Click **Search**.
7. **Select** the person you're looking for from the list of results.
8. When you're looking at your search results... You may see more than one PeopleSoft user ID for the person you want. In this case, be sure to pick the 10-character ID. For someone with the last name of Smith, it'll look like this: SMIT000121.
9. There are two Tabs in the User Profiles screens... On the Roles tab, you'll see the individual's roles in FIN.
- 10.

If the person has more than 10 roles, click the **ViewAll** icon above the list of roles to see all of them. Note that roles checked as “Dynamic” are system assigned: you don’t request those roles.

If you have a question about what a role does, you can check out the [role names and descriptions page](#) [2]. You can also contact your Campus [FIN Security Coordinator](#) [3].

Attachments:

[Role Definitions and Access Request Guide](#) [4]

Groups audience:

Controller

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Links

[1] <https://www.cu.edu/controller/fin-how-looking-up-finance-system-roles>

[2] https://www.cusys.edu/iam/CUonly/FIN9.2_Role_Definitions_and_Access_Request_Guide.xlsx

[3] <https://www.cu.edu/uis/access-it-security/request-access/campus-access-coordinators>

[4] <https://www.cu.edu/doc/fin92roledefinitionsandaccessrequestguidexlsx>