

Quick Reference Guide: Access & Training Requirements

Each course listed is required for access unless otherwise noted.

All courses are available online, within SkillSoft via [your campus portal](#), unless otherwise noted. After logging in to your campus portal, on the **CU Resources** tab, click **Training** and then select **Start SkillSoft**.

Some courses for PeopleSoft Finance System access must be taken in person. Contact your campus finance office for details.

[Boulder/System Administration](#)

[Denver & Anschutz Medical Campus](#)

[Colorado Springs](#)

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: Running m-Fin Reports (recommended)	U00113
	• Cognos: Working with m-Fin Reports (recommended)	U00114

Commercial Cards (Procurement Card and Travel Card)

Role	Course	Course #	Access Request Form
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 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	
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. *To approve Fund 34 expenses: see also Gift Fund section.*

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

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CU Marketplace

Log in to the [Oracle Identity Manager \(OIM\)](#) for role details and to request access.

Role	Course	Course #
Inquiry only	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
Fiscal Approver (including with Incompatible Access) <i>Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, see also Gift Fund section.</i>	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Approver 	U00081
Invoice/Match Exception Approver <i>Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, see also Gift Fund section.</i>	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Invoice/Match Exception Approver 	U00091
Receiver	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Receiver 	U00090
Requestor	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Requestor 	U00084
Shopper	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> CU Marketplace – Shopper (recommended) 	U00080

Gift Fund (Fund 34 SpeedType)

Role	Course	Course #
Fiscal Role on a Fund 34 SpeedType	<ul style="list-style-type: none"> Gift Fund Management – Beginner Course <p>(not required for individuals responsible for managing gift funds received from blended organizations (e.g., UPI) as part of a contract)</p>	U00082
Create or Approve Fund 34 Journal Entries (JEs)...or involved in daily operations of Gift Fund SpeedTypes	<ul style="list-style-type: none"> Gift Fund Management – Advanced Course (recommended) <p><i>Also see PeopleSoft Finance System section, below.</i></p>	U00083

PeopleSoft Finance System

Log in to the [Oracle Identity Manager \(OIM\)](#) for role details and to request access.

Role	Course	Course #
Inquiry only	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> PeopleSoft Finance System – Inquiry 	A00105
Create or Approve Journal Entries (JEs)	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> PeopleSoft Finance System – Inquiry 	A00105
	<ul style="list-style-type: none"> PeopleSoft Finance System – Journal Entries 	A00106
	<ul style="list-style-type: none"> In-person Financial Inquiry 	A00101
	<ul style="list-style-type: none"> In-person Financial – General Ledger 	A00102