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, use the **Training** dropdown menu (within the top navigation bar) to 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

CU Marketplace

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

Role	Course	Course #
Inquiry only	• Information Security and Privacy Awareness	U00063
Fiscal Approver (including with Incompatible Access) *Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, see also Gift Fund section.*	• Information Security and Privacy Awareness	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 or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, see also Gift Fund section.*	• Information Security and Privacy Awareness	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 Awareness	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 Awareness	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 Awareness	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

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

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