Published on *University of Colorado* (https://www.cu.edu)

Finding Financial Guidance is About to Get a Lot Easier: New OUC Knowledge Management System [1]

March 30, 2026

The OUC's Financial Services & Solutions (FSS) Help team is building something new — and we want you to help shape it.

As part of our transition from a Cherwell ticketing system to a Salesforce system for managing the inquiries we receive from all of you ... we're building a resource designed specifically for you, not just for our internal team. We expect the major part of this *Knowledge Management initiative* to span the period April-September 2026.

?We're not just building a system — we're building it with you. That means keeping you informed, asking for your input, and making sure the final product actually works for your day-to-day needs.

The new Knowledge Management system will be your go-to resource for the financial guidance you need most — all in one place:

- **Financial policies, procedures, and forms —** current, accurate, and easy to find
- **Tax documentation and guidance —** no more digging through old emails to find a form you've used in the past
- **Finance System and m-Fin/CU-Data instructions —** step-by-step help when you need it
- **CPE resources —** professional development guidance at your fingertips

What this will mean to you

With the implementation of the OUC's Knowledge Management system:

- You'll find it easier to search the **current** How-To and other knowledge articles that we already have on the OUC website.
- You'll find **new resources** to help you with your work.
- We're actively building this now – your **direct input** shapes what gets created first.
- You'll still be able to communicate with us, 1:1, through our **direct help line,** FSS@cu.edu [2].

What to expect from us

We'll keep you involved:

- We'll regularly include information about the Knowledge Management initiative in future OUC Newsletters.
- We'll provide ways for you to provide input.

- We'll have some fun contests along the way.

We look forward to building this together.

Can't wait to learn more? Want to get involved already? Reach out to OUC's Learning Design Program Director, Kristina Mendez, at FSS@cu.edu [3].

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