Access & Training Requirements [1]

Each course listed is required for access unless otherwise noted.

Training courses are available in Skillsoft unless otherwise noted. Log in to your campus portal [2] and on the CU Resources tab, click the Skillsoft tile.

- Concur Travel & Expense
- CU-Data
- CU Marketplace
- PeopleSoft Finance (FIN)
- Gift Fund (Fund 34)
- Procurement Card
- Travel Card

Employees and Type 15/31 POIs have access to Concur.

**To approve Travel Reconciliation/reimbursement expense reports:** You must be the employee’s HR Supervisor, have a fiscal role of org/program/project principal/fiscal manager on a SpeedType, or have a role as SpeedType Fiscal Staff Approver.

**To approve Procurement Card expense reports:** You must be the cardholder’s Procurement Card Approving Official (see Procurement Card section).

**To approve Fund 34 expenses on expense reports:** Also see the Gift Fund tab.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Course and Course #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking travel</td>
<td>Book travel for yourself or act as a Travel Arranger for others</td>
<td>Concur – Booking Travel [3] (_scorm12_cu_u00092_0001) Recommended</td>
</tr>
<tr>
<td>Reconciling travel</td>
<td>Reconcile travel expenses and reimbursements for yourself or act as a Delegate for others</td>
<td>Concur – Reconciling Travel [4] (_scorm12_cu_u00094_0001) Recommended</td>
</tr>
<tr>
<td>expenses/reimbursements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reconciling Procurement Card</td>
<td>Reconcile Procurement Card expenses for yourself or act as a Delegate for others</td>
<td>Concur – Reconciling Procurement Card [5] (_scorm12_cu_u00093_0001) Recommended</td>
</tr>
<tr>
<td>expenses</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can run m-Fin reports in CU-Data if you have a fiscal role on a SpeedType or if you have access to the Finance System. For more information, see the PeopleSoft Finance tab.

Your campus controller’s office may offer in-person training on how to run and read m-Fin
For online learning resources, see m-Fin Reports Training [6].

The Office of University Controller offers several courses on CU-Data to help CU CPAs meet their continuing educational requirements and to help all employees understand and fulfill their fiscal roles and responsibilities. View the Schedule and Registration page [7] for a listing of campus and online courses. To be notified when registration is available, subscribe to the OUC News Blog [8].
Complete the required trainings then log in to CU Identity Manager (OIM) [9] to request access to CU Marketplace.

**To approve Fund 34 expenses in CU Marketplace:** Also see the Gift Fund tab.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Course and Course #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiry only</td>
<td>View all order, invoice, and related information.</td>
<td>• Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)</td>
</tr>
<tr>
<td></td>
<td>Inquiry can be requested on its own and is automatically included with assignment of any Marketplace role.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create shopping carts to select goods and services and submits requisitions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Requisitions up to $10,000 become POs without additional approval.</td>
<td>• Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)</td>
</tr>
<tr>
<td></td>
<td>Requisitions over $10,000 go on for further approval.</td>
<td>• CU Marketplace – Requester [11] (_scorm12_cu_u00084_0001)</td>
</tr>
<tr>
<td>Requestor</td>
<td>Perform receiving on Purchase Orders (POs) over $10,000 in CU Marketplace, which authorizes payment for invoices.</td>
<td>• Procurement – Purchasing &amp; Contract Management [12] (_scorm12_cu_a00109_0001)</td>
</tr>
<tr>
<td></td>
<td>Not compatible with Shopper, Receiver, or Approver roles.</td>
<td>• Fiscal Code of Ethics [13] (_scorm12_cu_f00001_0001)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)</td>
</tr>
</tbody>
</table>
Fiscal Approver

Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, also see Gift Fund section.

Approve requisitions over $10,000 and Payment Vouchers in any dollar amount.

Not compatible with Requestor role.

Invoice Approver

Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, also see Gift Fund section.

Approve vouchers/invoices related to Standing Purchase Orders (SPOs) to authorize payment.

Receive notice of vouchers that fail match and works to resolve errors before approving vouchers.

Receiver

Perform receiving on Purchase Orders (POs) over $10,000 in CU Marketplace, which authorizes payment for invoices.

- Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)

- Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)
- CU Marketplace – Invoice/Match Exception Approver [16] (_scorm12_cu_u00091_0001)

- Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)
Create shopping carts to select goods and services. Must assign the cart to a Requestor for completion (cannot submit cart). Can only view their own orders, invoices, and related documents.

Not compatible with Requestor role.

Fiscal Approver IA (Incompatible Access)

Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.

Place orders/requisitions and approves or rejects/returns requisitions over $10,000 and Payment Vouchers in any dollar amount.

Assignment of this role in conjunction with the Requestor role creates an Incompatible Access situation for the user. Users requesting this role combination must provide justification for the incompatible access and certify that compensating controls are in place.

As detailed below, certain roles require that you have a fiscal role on a SpeedType. Submit the ChartField Request: SpeedType Fiscal Staff form, or email your campus controller’s office with the SpeedType number, fiscal role, employee’s name, and position number.

To approve Fund 34 expenses on expense reports: Also see the Gift Fund tab.

Some courses for Finance System access must be taken in person. Contact your campus controller’s office for details.

Boulder Campus/System

Denver | Anschutz Medical Campus

Campus Colorado Springs Campus

Complete the required trainings then log in to the CU Identity Manager (OIM) to request
<table>
<thead>
<tr>
<th>Role</th>
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<th>Course and Course #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Journal Entries (JE)</td>
<td>Create JEs; copy JEs; edit and import JEs.</td>
<td></td>
</tr>
</tbody>
</table>

access.
Approve Journal Entries (JEs)

Approve JEs.

JE approval is assigned via workflow. Workflow approval routing is governed by factors such as campus, journal source code, account and fund codes, and program or project numbers. Workflow approval roles begin with CU WF Journal and typically contain the campus and/or department name of the unit responsible for approvals.

- Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)
- PeopleSoft Finance System – Inquiry [23] (_scorm12_cu_a00105_0001)
- In-person Finance Inquiry [25] (Ilt_A00101) For CU Denver | Anschutz and UCCS
- In-person Finance General Ledger [26] (Ilt_A00102) For CU Denver | Anschutz and UCCS
- In-person PeopleSoft Finance Training [27] (Ilt_A10119) For Boulder

For fiscal role on a Fund 34 SpeedType, also see Gift Fund section. (Some courses for Finance System access must be taken in person. Contact your campus controller’s office for details.)

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Course and Course #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Role on a Fund 34 SpeedType</td>
<td>Approve Fund 34 expenses in Concur Travel &amp; Expense or CU Marketplace.</td>
<td>Gift Fund Management [28] (_scorm12_cu_u00082_0001) Not required for individuals responsible for managing gift funds received from blended organizations like UPI as part of a contract.</td>
</tr>
</tbody>
</table>

Submit the designated application form (noted in the table below) after completing required trainings.

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</tr>
</tbody>
</table>
### Procurement Card Cardholder

Use the Procurement Card to purchase small-dollar items for university use when not in travel status.

Form: Cardholder Application – Procurement Card [29]

- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)
- Procurement Card Cardholder Training [30] (_scorm12_cu_u00053_0001)

### Procurement Card Approving Official

Monitor Procurement Card transactions and approve expense reports for assigned cardholders.

Form: Approving Official Application/Update [29]

- Fiscal Code of Ethics [13] (F00001)
- Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)
- Procurement Card Approving Official Training [31] (_scorm12_cu_a00025_0001)

Submit the designated application form (noted in the table below) after completing required trainings.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Course and Course #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Card Cardholder</td>
<td>Use the Travel Card to cover most expenses related to official university business travel.</td>
<td>Fiscal Code of Ethics [13] (_scorm12_cu_f00001_0001)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Travel and Travel Card Training [32] (_scorm12_cu_u00078_0001)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Concur – Reconciling Travel [4] (_scorm12_cu_u00094_0001) Recommended</td>
</tr>
</tbody>
</table>

Groups audience:
Controller

Source URL: https://www.cu.edu/controller/training/access-training-requirements

Links
[1] https://www.cu.edu/controller/training/access-training-requirements
[2] https://my.cu.edu/
[3]