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Access & Training Requirements [1]

Each course listed is required for access unless otherwise noted.

Training courses are available in **Skillsoft Percipio** unless otherwise noted. Log in to your campus portal [2] and on the **CU Resources tab**, click the **Skillsoft Percipio** tile, then search by course name. To launch a course from this page, use the direct links in the **Course column** below.

Terminating access: Portal access will be shut off within hours of employee termination being recorded in HCM. Roles are removed on a weekly basis. To terminate access immediately, contact your campus security coordinator [3].

- 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/expense reimbursement reports: You must be either (1) the employee's HR Supervisor or (2) have a fiscal role of org/program/project principal/fiscal manager on a SpeedType, or have a role as SpeedType Fiscal Staff Approver. (This is based on the SpeedType identified in the header of the expense report.) For Gift Fund (34) SpeedTypes, see the Gift Fund tab for training requirements.
To approve Procurement Card expense reports: You must be the cardholder's Procurement Card Approving Official (see Procurement Card section).

Employees and Type 15 POIs can obtain access. 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 reports – see campus links on the PeopleSoft Finance tab.
For online learning resources, see m-Fin Reports Training [4].

The Office of University Controller offers 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 [5] for a listing of campus and online courses.

Employees and Type 15 POIs can request access.
As detailed below, certain roles (Fiscal Approver, Invoice Approver, and Fiscal Approver IA) require that you have a fiscal role on a SpeedType, for more information see the PeopleSoft Finance tab. To approve Fund 34 expenses in CU Marketplace: Also see the Gift Fund tab for training requirements.

Complete the required trainings. Then request system access [6].

Role	Description	Course and Course #
Inquiry only	View all order, invoice, and related information. Inquiry can be requested on its own and is automatically included with assignment of any Marketplace role.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [8] in addition to taking the course within 60 days of hire.
Requestor	Create shopping carts to select goods and services and submit requisitions. Requisitions up to $10,000 become POs without additional approval. Requisitions over $10,000 go on for further approval. Perform receiving on Purchase Orders (POs) over $10,000 in CU Marketplace, which authorizes payment for invoices. Not compatible with Shopper, Receiver, or Approver roles.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [10] (_scorm12_cu_u00220_0001) • Procurement Fundamentals [11] (_scorm12_cu_u00208_0001) • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001)

Fiscal Approver *Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.*	Approve requisitions over $10,000 and Payment Vouchers in any dollar amount. Not compatible with Requestor role. In situations when an Approver also needs to be a Requestor, the Approver IA role (below) must be selected.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [14] (_scorm12_cu_u00220_0001) • Procurement Fundamentals [15] (_scorm12_cu_u00208_0001) • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001)
Invoice Approver *Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.*	Approve vouchers/invoices related to Standing Purchase Orders (SPOs) to authorize payment. Receive notice of vouchers that fail match and work to resolve errors before approving vouchers.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [14] (_scorm12_cu_u00220_0001) • Procurement Fundamentals [15] (_scorm12_cu_u00208_0001) • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001)

Receiver	Perform receiving on Purchase Orders (POs) over $10,000 in CU Marketplace, which authorizes payment for invoices.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [14] (_scorm12_cu_u00220_0001) • Procurement Fundamentals [11] (_scorm12_cu_u00208_0001) • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001)
Shopper	Create shopping carts to select goods and services Must assign the cart to a Requestor for completion (cannot submit cart). Not compatible with Requestor role.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [14] (_scorm12_cu_u00220_0001) *Recommended*

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.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Purchasing Goods and Services with CU Marketplace [14] (_scorm12_cu_u00220_0001) • Procurement Fundamentals [11] (_scorm12_cu_u00208_0001) • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001)

Employees and Type 15 POIs can request access.
To request a fiscal role on a SpeedType: Submit the ChartField Request: SpeedType Fiscal Staff form [16], or email your campus controller's office with the SpeedType number, fiscal role, employee's name, and position number. For Gift Fund (34) SpeedTypes, also see the Gift Fund tab for training requirements.

Your campus controller's office offers an additional, campus-oriented course on the Finance System. Contact your campus controller's office for details.

Boulder Campus/System [17]

Denver | Anschutz [18]

Colorado Springs Campus [19]

Complete the required trainings. Then request system access [6].

Role	Description	Course and Course #

Inquiry only	View transactions in the Finance System. Inquiry can be requested on its own and is automatically included with assignment of any Finance System role.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • PeopleSoft Finance System – Inquiry [20] (_scorm12_cu_a00105_0001)
Create Journal Entries (JEs)	Create JEs; copy JEs; edit and import JEs.	• Information Security Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • PeopleSoft Finance System – Inquiry [20] (_scorm12_cu_a00105_0001) • PeopleSoft Finance System – Journal Entries [21] (_scorm12_cu_a00106_0001)

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 Awareness [7] (_scorm12_cu_u00063_0001) Employees must complete the Skillsoft course every two years [9] in addition to taking the course within 60 days of hire. • Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • PeopleSoft Finance System – Inquiry [20] (_scorm12_cu_a00105_0001) • PeopleSoft Finance System – Journal Entries [21] (_scorm12_cu_a00106_0001)

To approve Fund 34 expenses in Concur reimbursement reports (this is based on the SpeedType in the header of the expense report), you'll need to request a fiscal role on a Fund 34 SpeedType (see the PeopleSoft Finance tab). Also see training requirements below.

To approve Fund 34 expenses in CU Marketplace, you'll need to request the Marketplace Fiscal Approver or Invoice Approver role (see the CU Marketplace tab), as well as a fiscal role on the 34 SpeedType (see the PeopleSoft Finance tab). Also see training requirements below.

Role	Description	Course and Course #
Fiscal Role on a Fund 34 SpeedType	Approve Fund 34 expenses in Concur reimbursement expense reports (based on the SpeedType in the report header). Approve Fund 34 expenses in CU Marketplace.	Gift Fund Management [22] (_scorm12_cu_u00082_0001) *Not required for individuals responsible for managing gift funds received from blended organizations like CU Medicine as part of a contract.*

Employees and Type 15 POIs can request a card. Submit the designated application form (noted in the table below) after completing required trainings.

Role	Description	Course and Course #

Procurement Card Cardholder	Use the Procurement Card for small-dollar purchases when the CU Marketplace is not appropriate. (For travel expenses, see the Travel Card.) Form: Procurement Card Cardholder Application [23]	• Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • Procurement Fundamentals [11] (_scorm12_cu_u00208_0001) • IT Procurement [24] (_scorm12_u00282_0001) • Procurement Card Cardholder Training [25] (_scorm12_cu_u00053_0001)
Procurement Card Approving Official	Monitor Procurement Card transactions and approve expense reports for assigned cardholders. Form: Procurement Card Approving Official Application/Update [23]	• Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • Procurement Fundamentals [11] (_scorm12_cu_u00208_0001) • IT Procurement [24] (_scorm12_u00282_0001) • Procurement Card Approving Official Training [26] (_scorm12_cu_a00001_0001)

Employees and Type 15 POIs can request a card. Submit the designated application form (noted in the table below) after completing required trainings.

Role	Description	Course and Course #
Travel Card Cardholder	Use the Travel Card to cover most expenses related to official university business travel. Form: Travel Card Application [27]	• Fiscal Code of Ethics [12] (_scorm12_cu_f00001_0001) • Or, for University Officers, Fiscal Code of Ethics – Officers [13] (_scorm12_cu_f00002_0001) • Travel and Travel Card Training [28] (_scorm12_cu_u00078_0001)

Have a question or feedback?

For questions or feedback contact

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] https://www.cu.edu/uis/access-it-security/request-access/campus-access-coordinators
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[8] https://www.cu.edu/security/information-security-course-compliance-faqs%20
[9] https://www.cu.edu/security/information-security-course-compliance-faqs
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[12] https://share.percipio.com/cd/z60XKS8jD [13] https://share.percipio.com/cd/9FcUclM33
[14] http://universityofcolorado.percipio.com/linked-contents/de444ad3-8f46-4d37-bd76-c1d805031ccf/landing?sharelink=JCLlH-fXM [15] https://share.percipio.com/cd/iVmQANthe
[16] https://www.cu.edu/controller/policies/chartfield-request-%E2%80%93-speedtype-fiscal-staff
[17] https://www.colorado.edu/controller/training [18] https://www.cuanschutz.edu/offices/fiscal-compliance/training/finance-access-training [19] https://budget.uccs.edu/uccs-controllers-office/financeprocurement-access [20] https://share.percipio.com/cd/kYIZJPGYl
[21] https://share.percipio.com/cd/6m_FXjFin [22] https://share.percipio.com/cd/C03yCWFTc
[23] https://www.cu.edu/psc/procurement-card-handbook [24] https://share.percipio.com/cd/yevvY3mHI
[25] https://share.percipio.com/cd/JZZY2UHYB2 [26] https://share.percipio.com/cd/DKdO9HN9Q
[27] https://www.cu.edu/psc/travel/you-travel/travel-card [28] https://share.percipio.com/cd/M_Pa2lICG
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mailto:fss@cu.edu?subject=Question%20or%20Feedback%20&body=What%20page%20this%20is%20from:%20' + window.location.href +