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)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recommended</td>
</tr>
<tr>
<td>Reconciling travel expenses/reimbursements</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)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recommended</td>
</tr>
<tr>
<td>Reconciling Procurement Card expenses</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)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recommended</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
reports – see campus links on the PeopleSoft Finance tab. 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].

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.

Complete the required trainings then log in to CU Identity Manager (OIM) [9] to request access to CU Marketplace.

<table>
<thead>
<tr>
<th>Role</th>
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</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 <strong>except shopper</strong>.</td>
<td></td>
</tr>
<tr>
<td>Requestor</td>
<td>Create shopping carts to select goods and services and submit requisitions.</td>
<td>• Information Security and Privacy Awareness [10] (_scorm12_cu_u00063_0001)</td>
</tr>
<tr>
<td></td>
<td>Requisitions up to $10,000 become POs without additional approval.</td>
<td>• CU Marketplace – Requester [11] (_scorm12_cu_u00084_0001)</td>
</tr>
<tr>
<td></td>
<td>Requisitions over $10,000 go on for further approval.</td>
<td>• Procurement – Purchasing &amp; Contract Management [12] (_scorm12_cu_a00109_0001)</td>
</tr>
<tr>
<td></td>
<td>Perform receiving on Purchase Orders (POs) over $10,000 in CU Marketplace, which authorizes payment for invoices.</td>
<td>• Fiscal Code of Ethics [13] (_scorm12_cu_f00001_0001)</td>
</tr>
<tr>
<td></td>
<td>Not compatible with Shopper, Receiver, or Approver roles.</td>
<td>• Or, for University Officers, Fiscal Code of Ethics – Officers [14] (_scorm12_cu_f00002_0001)</td>
</tr>
</tbody>
</table>
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 is also be a Requestor, the Approver IA role (below) must be selected.

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.

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)
**Shopper**

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 JEs:** 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**
Complete the required trainings then log in to the CU Identity Manager (OIM) to request access.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Course and Course #</th>
</tr>
</thead>
</table>
| Inquiry only | View transactions in the Finance System. | - 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) |
| Create Journal Entries (JEs) | Create JEs; copy JEs; edit and import JEs. | - 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 [29] (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 |
Approve Journal Entries (JEs)

To approve Fund 34 expenses in Concur, you'll need to request a fiscal role on a Fund 34 SpeedType (see the PeopleSoft Finance tab).

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).

To create or approve Fund 34 JEs, see the Finance tab).

<table>
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</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. Create JEs involving Gift Fund SpeedTypes in the Finance System. For fiscal role on a Fund 34 SpeedType see the PeopleSoft Finance tab.</td>
<td>Gift Fund Management [28] (_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.</td>
</tr>
<tr>
<td>Create or Approve Fund 34 Journal Entries (JEs)</td>
<td>Approve JEs involving Gift Fund SpeedTypes in the Finance System.</td>
<td>Gift Fund Management [28] (_scorm12_cu_u00082_0001) Recommended?</td>
</tr>
</tbody>
</table>
Approve Marketplace Fund 34 Requisitions

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

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>
</table>
| 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.) | • Procurement – Purchasing & Contract Management [12] (scorm12_cu_a00109_0001)  
• Fiscal Code of Ethics [13] (scorm12_cu_f00001_0001)  
• Or, for University Officers, Fiscal Code of Ethics – Officers [14] (scorm12_cu_f00002_0001)  
• Procurement Card Cardholder Training [30] (scorm12_cu_u00053_0001)  
• Concur – Reconciling Procurement Card [5] (scorm12_cu_u00093_0001) Recommended |
• Fiscal Code of Ethics [13] (scorm12_cu_f00001_0001)  
• Or, for University Officers, Fiscal Code of Ethics – Officers [14] (scorm12_cu_f00002_0001)  
• Procurement Card Approving Official Training [31] (scorm12_cu_a00001_0001) |

Submit the designated application form (noted in the table below) after completing required trainings.
Use the Travel Card to cover most expenses related to official university business travel.

Form: Cardholder Application – Travel Card

Have a question or feedback?

Questions & Feedback

Feedback or Question *

Your Email Address

Submit

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/
[8] https://www.cu.edu/blog/ouc-news
[9] https://www.cu.edu/docs/process-guide-requesting-access
[14]