

## Access & Training Requirements <sup>[1]</sup>

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](#) <sup>[2]</sup> and on the **CU Resources tab**, click the **Skillsoft** 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](#) <sup>[3]</sup>.

- 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.

Role	Description	Course and Course #
Booking travel	Book travel for yourself or act as a Travel Arranger for others	Concur – Booking Travel <sup>[4]</sup> (_scorm12_cu_u00092_0001) <i>Recommended</i>
Reconciling travel expenses/reimbursements	Reconcile travel expenses and reimbursements for yourself or act as a Delegate for others	Concur – Reconciling Travel <sup>[5]</sup> (_scorm12_cu_u00094_0001) <i>Recommended</i>

Reconciling Procurement Card expenses	Reconcile Procurement Card expenses for yourself or act as a Delegate for others	Concur – Reconciling Procurement Card <sup>[6]</sup> (_scorm12_cu_u00093_0001) <i>Recommended</i>
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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 <sup>[7]</sup>.

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 <sup>[8]</sup> for a listing of campus and online courses. To be notified when registration is available, subscribe to the OUC News Blog <sup>[9]</sup>.

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.

Complete the required trainings then log in to CU Identity Manager (OIM) <sup>[10]</sup> to request access to CU Marketplace.

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.	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> </ul>

Requestor	<p>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.</p>	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• CU Marketplace – Requester <sup>[12]</sup> (_scorm12_cu_u00084_0001)</li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> </ul>
	<p>Perform receiving on Purchase Orders (POs) over \$10,000 in CU Marketplace, which authorizes payment for invoices.</p>	
	<p>Not compatible with Shopper, Receiver, or Approver roles.</p>	
Fiscal Approver	<p>Approve requisitions over \$10,000 and Payment Vouchers in any dollar amount.</p>	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> <li>• CU Marketplace – Approver <sup>[16]</sup> (_scorm12_cu_u00081_0001)</li> </ul>
<p><i>Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.</i></p>	<p>Not compatible with Requestor role.</p> <p>In situations when an Approver also needs to be a Requestor, the Approver IA role (below) must be selected.</p>	
Invoice Approver	<p>Approve vouchers/invoices related to Standing Purchase Orders (SPOs) to authorize payment.</p> <p>Receive notice of vouchers that fail match and work to resolve errors before approving vouchers.</p>	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> <li>• CU Marketplace – Invoice/Match Exception Approver <sup>[17]</sup> (_scorm12_cu_u00091_0001)</li> </ul>
<p><i>Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.</i></p>		

Receiver	Perform receiving on Purchase Orders (POs) over \$10,000 in CU Marketplace, which authorizes payment for invoices.	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> <li>• CU Marketplace – Receiver <sup>[18]</sup> (_scorm12_cu_u00090_0001)</li> </ul>
Shopper	<p>Create shopping carts to select goods and services Must assign the cart to a Requestor for completion (cannot submit cart).</p> <p>Not compatible with Requestor role.</p>	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• CU Marketplace – Shopper <sup>[19]</sup> (_scorm12_cu_u00080_0001) <i>Recommended</i></li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> </ul>
Fiscal Approver IA (Incompatible Access)	Place orders/requisitions and approves or rejects/returns requisitions over \$10,000 and Payment Vouchers in any dollar amount.	<ul style="list-style-type: none"> <li>• Information Security and Privacy Awareness <sup>[11]</sup> (_scorm12_cu_u00063_0001)</li> <li>• Procurement – Purchasing &amp; Contract Management <sup>[13]</sup> (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics <sup>[14]</sup> (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (_scorm12_cu_f00002_0001)</li> <li>• CU Marketplace – Approver <sup>[16]</sup> (_scorm12_cu_u00081_0001)</li> </ul>
<i>Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes.</i>	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.	

Employees and Type 15 POIs can request access. As detailed below, certain roles require that you have a fiscal role on a SpeedType. Submit the [ChartField Request: SpeedType Fiscal Staff form](#)

[20], 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 [21]

Denver | Anschutz Medical Campus [22]

Colorado Springs Campus [23]

Complete the required trainings then log in to the CU Identity Manager (OIM) [10] to request access.

Role	Description	Course and Course #
	View transactions in the Finance System.	<ul style="list-style-type: none"><li>Information Security and Privacy Awareness [11] (_scorm12_cu_u00063_0001)</li><li>Fiscal Code of Ethics [14] (_scorm12_cu_f00001_0001)</li><li>Or, for University Officers, Fiscal Code of Ethics – Officers [15] (_scorm12_cu_f00002_0001)</li><li>PeopleSoft Finance System – Inquiry [24] (_scorm12_cu_a00105_0001)</li></ul>
Inquiry only	Inquiry can be requested on its own and is automatically included with assignment of any Finance System role.	

Create Journal Entries (JEs)

Create JEs; copy JEs; edit and import JEs.

- Information Security and Privacy Awareness <sup>[11]</sup> (\_scorm12\_cu\_u00063\_0001)
- Fiscal Code of Ethics <sup>[14]</sup> (\_scorm12\_cu\_f00001\_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (\_scorm12\_cu\_f00002\_0001)
- PeopleSoft Finance System – Inquiry <sup>[24]</sup> (\_scorm12\_cu\_a00105\_0001)
- PeopleSoft Finance System – Journal Entries <sup>[25]</sup> (\_scorm12\_cu\_a00106\_0001)
- **In-person** Finance Inquiry <sup>[26]</sup> (Ilt\_A00101) *For CU Denver | Anschutz and UCCS*
- **In-person** Finance General Ledger <sup>[27]</sup> (Ilt\_A00102) *For CU Denver | Anschutz and UCCS*
- **In-person** PeopleSoft Finance Training <sup>[28]</sup> (Ilt\_A10119) *For Boulder*

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 <sup>[11]</sup> (\_scorm12\_cu\_u00063\_0001)
- Fiscal Code of Ethics <sup>[14]</sup> (\_scorm12\_cu\_f00001\_0001)
- Or, for University Officers, Fiscal Code of Ethics – Officers <sup>[15]</sup> (\_scorm12\_cu\_f00002\_0001)
- PeopleSoft Finance System – Inquiry <sup>[24]</sup> (\_scorm12\_cu\_a00105\_0001)
- PeopleSoft Finance System – Journal Entries <sup>[25]</sup> (\_scorm12\_cu\_a00106\_0001)
- **In-person** Finance Inquiry <sup>[26]</sup> (Ilt\_A00101) *For CU Denver | Anschutz and UCCS*
- **In-person** Finance General Ledger <sup>[27]</sup> (Ilt\_A00102) *For CU Denver | Anschutz and UCCS*
- **In-person** PeopleSoft Finance Training <sup>[28]</sup> (Ilt\_A10119) *For Boulder*

**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).

Role	Description	Course and Course #
	Approve Fund 34 expenses in Concur Travel & Expense or CU Marketplace.	
Fiscal Role on a Fund 34 SpeedType	Create JEs involving Gift Fund SpeedTypes in the Finance System.  For fiscal role on a Fund 34 SpeedType see the PeopleSoft Finance tab.	Gift Fund Management [29] (_scorm12_cu_u00082_0001) <i>Not required for individuals responsible for managing gift funds received from blended organizations like CU Medicine as part of a contract.</i>

Employees and Type 15 POIs can request a card. 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.

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: Cardholder Application – Procurement Card [30]	<ul style="list-style-type: none"> <li>• Procurement – Purchasing &amp; Contract Management [13] (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics [14] (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers [15] (_scorm12_cu_f00002_0001)</li> <li>• Procurement Card Cardholder Training [31] (_scorm12_cu_u00053_0001)</li> <li>• Concur – Reconciling Procurement Card [6] (_scorm12_cu_u00093_0001) <i>Recommended</i></li> </ul>

Procurement Card Approving Official	<p>Monitor Procurement Card transactions and approve expense reports for assigned cardholders.</p> <p>Form: Approving Official Application/Update [30]</p>	<ul style="list-style-type: none"> <li>• Procurement – Purchasing &amp; Contract Management [13] (_scorm12_cu_a00109_0001)</li> <li>• Fiscal Code of Ethics [14] (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers [15] (_scorm12_cu_f00002_0001)</li> <li>• Procurement Card Approving Official Training [32] (_scorm12_cu_a00001_0001)</li> </ul>
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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	<p>Use the Travel Card to cover most expenses related to official university business travel.</p> <p>Form: Cardholder Application – Travel Card [30]</p>	<ul style="list-style-type: none"> <li>• Fiscal Code of Ethics [14] (_scorm12_cu_f00001_0001)</li> <li>• Or, for University Officers, Fiscal Code of Ethics – Officers [15] (_scorm12_cu_f00002_0001)</li> <li>• Travel and Travel Card Training [33] (_scorm12_cu_u00078_0001)</li> <li>• Concur – Reconciling Travel [5] (_scorm12_cu_u00094_0001)</li> </ul> <p><i>Recommended</i></p>

## Have a question or feedback?

## Questions & Feedback [34]

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/>

