February 7, 2012

New Finance Access Request Form: PeopleSoft FIN and Marketplace Together

We are pleased to introduce a consolidated new form for requesting access to the PeopleSoft Finance System and/or the CU Marketplace.

The new tool is the Financial Systems Access Request form – and it is available on the University Information Systems (UIS) website. We also link to it directly from the PSC Forms page.

The new form provides a better user experience, streamlining the process of stepping through security access needs and firmly grounding it as an online form (digital signatures and electronic routing are mandatory: you do not submit a printed access request). It replaces all of the following processes:

- **Request for PeopleSoft Finance System - department (regular) access.** Previously, this was accomplished by submitting the old regular access request form to the UIS security coordinators.
- **Request for PeopleSoft Finance System - specialized access.** In the past, this was similar to the regular access request process, but required the submission of a distinct form.
- **Request for Marketplace access.** Previously, this was formerly accomplished by providing requested user role information on spreadsheets and submitting the spreadsheets to the PSC.

We believe you will find the new form easy to use and effective. Should you have any questions on how to use the form, please do not hesitate to contact your Finance System security coordinator.

Good News for Concur Users

We've made a few system improvements to Concur Travel & Expense – we think you'll like them:

We've removed the old Employee Reimbursement with TA policy. You can still view expense reports you completed under that policy, but you can no longer create new reports under it. (This is a good thing – since you can't submit reports created under this policy any more. The Travel Reconciliation policy is the one to use for submitting reimbursement expense reports.)

We've changed the name of the old policy, Event Card/Non Employee TA, to simply Event Card. (This policy will be removed when all final Event Card expense reports have been submitted. The new corporate liability Travel Card has replaced both the old personal card and the old Event Card.)

Personal liability travel cards have been unassigned and removed from Concur. This means any unassigned transactions for those cards are also removed.

Questions? Contact FinProHelp@cu.edu.

Concur Expense and the Receipt Store

There are three ways to attach documents to an expense report in the Concur Travel & Expense System: faxing, scanning, or using the Receipt Store and line item receipts.

The Receipt Store is a feature that works with Concur Imaging to provide a repository of documents that can be attached to expense reports. You can upload images to the store, and then later attach those images at the line item expense entry level. In other words, you have the ability to associate documents directly with the individual expenses. For the approver, the task of verifying document images to specific expenses is made much easier as the expense line and the document are displayed side-by-side in the expense report.

Expense delegates can view an individual's Receipt Store if they have been granted the permission "Can View Receipts" when designated as an expense delegate.

Loading images into the Receipt Store is easy:

1. Scan the required documentation and save the images to your computer.

2. Click **Receipt Store** in the upper right corner of the expense report.

3. Follow the prompts; browse to attach the document(s) to the store.

You can click the Receipt Store link to access saved documents and attach them to specific lines of an expense report.

Note: Approvers can attach more documents to a report that has been submitted to them for review, but no documents can be deleted after submission.

Questions? Email FinProHelp@cu.edu or call 303.837.2161.

Reminder: PSC Open Houses

We are celebrating Procurement Month (March) with a series of events designed to help you learn more about procurement … and more about the PSC.

Register on the PSC website. The schedule is as follows:

UCCS: March 7, 9:30-11:30 am, University Center, Berger Hall

AMC: March 13, 9 am-12 noon, Research Center 2, 2nd floor conference room

UCB: March 15, 9 am-12 noon, UMC, Room 235

UCD/System: March 21, 1-4 pm, PSC Offices, 1800 Grant Street, 5th floor