

Quick Reference Guide: Access & Training Requirements

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](#) and on the CU Resources tab, click the **Skillsoft** tile. 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](#)

[Colorado Springs Campus](#)

Fiscal Roles (including SpeedType Fiscal Staff Approver)

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. For fiscal role on a Fund 34 SpeedType, also see Gift Fund section.

[Boulder Campus](#)

[Denver | Anschutz Medical Campus](#)

[Colorado Springs Campus](#)

[System](#)

CU-Data (Cognos Financial Reporting System)

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.

Your campus controller's office may offer in-person training on how to run and read m-Fin reports – see campus links above.

For online learning resources, see [m-Fin Reports Training](#).

Commercial Cards (Procurement Card, Travel Card)

Role	Course	Course #	Access Request Form
Travel Card Cardholder	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)	Cardholder Application – Travel Card
	<ul style="list-style-type: none"> Travel and Travel Card Training 	U00078	
	<ul style="list-style-type: none"> Concur – Reconciling Travel (recommended) 	U00094	
Procurement Card Cardholder	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109	Cardholder Application – Procurement Card
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)	
	<ul style="list-style-type: none"> Procurement Card Cardholder Training 	U00053	
Procurement Card Approving Official	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109	Approving Official Application/Update
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)	
	<ul style="list-style-type: none"> Procurement Card Approving Official Training 	A00025	

Concur Travel & Expense System

Employees and Type 15/31 POIs can access the Concur Travel & Expense System. To approve Travel Reconciliation/reimbursement expense reports, you must be the employee's HR Supervisor, or have a fiscal role of org/program/project principal or 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. To approve Fund 34 expenses on expense reports, also see Gift Fund section.

Role	Course	Course #
Booking travel (including travel arrangers)	<ul style="list-style-type: none"> Concur – Booking Travel (recommended) 	U00092
Reconciling travel expenses/reimbursements (including delegates)	<ul style="list-style-type: none"> Concur – Reconciling Travel (recommended) 	U00094
Reconciling Procurement Card expenses (including delegates)	<ul style="list-style-type: none"> Concur – Reconciling Procurement Card (recommended) 	U00093

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CU Marketplace

Log in to [CU Identity Manager \(OIM\)](#) to see role definitions and request access.

Role	Course	Course #
Inquiry only	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
Fiscal Approver (including with Incompatible Access) <i>Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, also see Gift Fund section.</i>	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Approver 	U00081
Invoice/Match Exception Approver <i>Must also have fiscal role (except Officer or Fiscal Staff – Report Recipient) on SpeedType. For Fund 34 expenses, also see Gift Fund section.</i>	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Invoice/Match Exception Approver 	U00091
Receiver	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Receiver 	U00090
Requestor	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Procurement – Purchasing & Contract Management 	A00109
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> CU Marketplace – Requestor 	U00084
Shopper	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> CU Marketplace – Shopper (recommended) 	U00080

Gift Fund (Fund 34 SpeedType)

Role	Course	Course #
Fiscal Role on a Fund 34 SpeedType (to approve Fund 34 expenses in Concur Travel & Expense or CU Marketplace)	<ul style="list-style-type: none"> Gift Fund Management (not required for individuals responsible for managing gift funds received from blended organizations like UPI as part of a contract) 	U00082
Create or Approve Fund 34 Journal Entries (JEs)...or involved in daily operations of Gift Fund SpeedTypes	<ul style="list-style-type: none"> Gift Fund Management (recommended) <i>Also see Finance System section.</i> 	U00082

Finance System

Log in to the [CU Identity Manager \(OIM\)](#) to see role definitions and request access.

Role	Course	Course #
Inquiry only	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> PeopleSoft Finance System – Inquiry 	A00105
Create or Approve Journal Entries (JEs)	<ul style="list-style-type: none"> Information Security and Privacy Awareness 	U00063
	<ul style="list-style-type: none"> Fiscal Code of Ethics (or, for University Officers, Fiscal Code of Ethics – Officers) 	F00001 (or F00002)
	<ul style="list-style-type: none"> PeopleSoft Finance System – Inquiry 	A00105
	<ul style="list-style-type: none"> PeopleSoft Finance System – Journal Entries 	A00106
	<ul style="list-style-type: none"> In-person Finance Inquiry (for CU Denver Anschutz and UCCS) 	Ilt_A00101
	<ul style="list-style-type: none"> In-person Finance General Ledger (for CU Denver Anschutz and UCCS) 	Ilt_A00102
	<ul style="list-style-type: none"> In-person Peoplesoft Finance Training (for Boulder) 	Ilt_A10119