FINANCIAL SYSTEMS

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
PeopleSoft Financials	**CU FIN Inquiry**-View Financial Transactions in FIN 9.2 (Automatically included with any PeopleSoft role, do not request unless this is the only PeopleSoft Role being requested)	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o A00105 - Financials - Inquiry
	CU GL Journal Entry – Create actual, budget, and cash journal entries. Inquire on all journal entries. Approver of actual journal entries is dependent on the workflow that has been setup for your unit/department. Budget journal entries and cash transfers are approved by RMD.	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o A00105 - Financials - Inquiry o A00106 - Journal Entries o A00101 - ***In-Person*** Financial Inquiry o A00102 - ***In-Person*** Financial General Ledger
Cognos Reporting	**Cognos**- Run m-Fin Financial Reports & Look-ups. (If you have a fiscal role on a Speedtype or have access to PeopleSoft Financials, you already have authorization to run Cognos reports)	o A00102 - ***In-Person*** Financial General Ledger (Recommended) o U00085-Cognos Reporting System (Recommended)

COMMERCIAL CARDS

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
Commercial Cards	**Procurement Card-Cardholder**	o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o U00053 - Procurement Card Cardholder Training o U00093 - Concur Reconciling Procurement Card (Recommended)
	Travel Card-Cardholder	o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00078 - Travel and Travel Card Training o U00093 - Concur Reconciling Travel (Recommended) o U00092- Concur: Booking Travel (Recommended)
	Approving Official	o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o A00025 - Procurement Card Approving Official

PROCUREMENT SYSTEM

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
CU Marketplace	**Shopper** - Create shopping carts for goods & services. Must assign carts to *Requestor*. Cannot place orders directly.	o U00063 - Information Security and Privacy o U00080 - CU Marketplace Shopper (Recommended)
	Requestor - Create shopping carts for goods & services, place orders up to $5,000, and submit requisitions over $5,000 to *Fiscal Approver*. Can view all order/invoice/requisition history in Marketplace.	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o U00084 - CU Marketplace Requestor
	Receiver – Enters online receiving for Purchase Orders. Authorizes payment for POs **not** SPOs. (SPOs are approved by *Invoice Approver*)	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o U00090 - CU Marketplace Receiver
	Fiscal Approver- Approves/Rejects requisitions over $5,000 and Payment Vouchers of any dollar amount. (Must also be Fiscal Staff Approver/Principal/ or Manager on relevant Speedtype)	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o U00081 - CU Marketplace Approver
	Invoice Approver- Receives notice of vouchers that fail match. Works with unit to resolve errors prior to giving approval. Provides approval for SPO; responsible verifying OK to pay before approving (Must also be Fiscal Staff Approver/Principal/ or Manager on relevant Speedtype)	o U00063 - Information Security and Privacy o F00001 - Fiscal Code of Ethics (***Note***: University Officers take F00002) o U00208 - Procurement Fundamentals o U00091- CU Marketplace Invoice/Match Exception Approver
	Inquiry- Can only view all order/invoice/ requisition history in Marketplace. (Automatically included with any Marketplace role, do not request unless this is only Marketplace role desired)	o U00063 - Information Security and Privacy

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SkillSoft Percipio

SkillSoft Percipio, a Learning Management System utilized by the University of Colorado, provides online training courses and enrollment for instructor-led (in-person) courses that are required by federal, state, and/or university requirements.

To access Percipio (SkillSoft):
1) Login to the UCCS Portal: https://portal.prod.cu.edu/MyUCCSFedAuthLogin.html
2) Select the **CU Resources** tab at the top of the page.
3) In the navigation bar, click Training and select **"Skillsoft Percipio" tile.**
4) Selecting a Course – go to a Library from the Main Menu:
   a. For In-Person Finance Training, Select **UCCS** button on the center of the page>**Instructor Led Training (ILT)** Tile> **UCCS: Finance** Tile under Channels/Journeys.
   b. For Online Training, Select the **UCCS** Tile from the University of Colorado System:
      i. Finance Tile - Fiscal Code of Ethics, Financial Inquiry, and General Ledger
      ii. Procurement Tile – Contains courses for Concur, CU Marketplace, Procurement Cards (P-Cards), and Travel Cards.