

## FINANCIAL SYSTEMS

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
PeopleSoft Financials	<b>CU FIN Inquiry</b> -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)	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ A00105 - Financials - Inquiry</li> </ul>
	<b>CU GL Journal Entry</b> – 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.	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ A00105 - Financials - Inquiry</li> <li>○ A00106 - Journal Entries</li> <li>○ A00101 - <b>In-Person</b> Financial Inquiry</li> <li>○ A00102 - <b>In-Person</b> Financial General Ledger</li> </ul>
Cognos Reporting	<b>Cognos</b> - 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)	<ul style="list-style-type: none"> <li>○ A00102 - <b>In-Person</b> Financial General Ledger (Recommended)</li> </ul>

## COMMERCIAL CARDS

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
Commercial Cards	<b>Procurement Card-Cardholder</b>	<ul style="list-style-type: none"> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ U00053 - Procurement Card Cardholder Training</li> </ul>
	<b>Travel Card-Cardholder</b>	<ul style="list-style-type: none"> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00078 - Travel and Travel Card Training</li> </ul>
	<b>Approving Official</b>	<ul style="list-style-type: none"> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ A00025 - Procurement Card Approving Official</li> </ul>

# PROCUREMENT SYSTEM

System Role Verify with Supervisor/Dept Which Roles to Request		Course Description Required Unless Otherwise Noted
CU Marketplace	<b>Shopper</b> - Create shopping carts for goods & services. Must assign carts to <i>Requestor</i> . Cannot place orders directly. Cannot be a <i>Requestor</i> .	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ U00220 - Purchasing Goods and Services with CU Marketplace (Recommended)</li> </ul>
	<b>Requestor</b> - Create shopping carts for goods & services, place orders up to \$10,000, and submit requisitions over \$10,000 to <i>Fiscal Approver</i> . Can view all order/invoice/requisition history in Marketplace. Cannot be a <i>Shopper</i> .	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ U00220 - Purchasing Goods and Services with CU Marketplace</li> </ul>
	<b>Receiver</b> – Enters online receiving for Purchase Orders. Authorizes payment for POs <b>not</b> SPOs.  (SPOs are approved by <i>Invoice Approver</i> )	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ U00220 - Purchasing Goods and Services with CU Marketplace</li> </ul>
	<b>Fiscal Approver</b> - Approves/Rejects requisitions over \$10,000 and Payment Vouchers of any dollar amount.  (Must also be Fiscal Staff Approver/Principal/ or Manager on relevant Speedtypes)	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ U00220 - Purchasing Goods and Services with CU Marketplace</li> <li>○ U00082 - Gift Fund Management-Beginner (Recommended)</li> </ul>
	<b>Invoice Approver</b> - 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 Speedtypes)	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> <li>○ F00001 - Fiscal Code of Ethics (<b>Note:</b> University Officers take F00002)</li> <li>○ U00208 - Procurement Fundamentals</li> <li>○ U00220 - Purchasing Goods and Services with CU Marketplace</li> <li>○ U00082 - Gift Fund Management-Beginner (Recommended)</li> </ul>
	<b>Inquiry</b> - 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)	<ul style="list-style-type: none"> <li>○ U00063 - Information Security and Privacy Awareness</li> </ul>

## 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.