## Frequently Requested Finance / Marketplace Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
<th>Required Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU GL Journal Entry 9.2</td>
<td>Create, update, copy, and/or import journals. This role includes CU Fin Inquiry 9.2 so you do not need both.</td>
<td>A00105, A00106, F00001 or F00002, A00101, A00102 (in-person courses)*, U00063</td>
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<tr>
<td>CU Fin Inquiry 9.2</td>
<td>All inquiry (no bank account, SSN), reports, query viewer, tree viewer. This role should only be requested if user has no other FIN access.</td>
<td>A00105, A00106, F00001 or F00002, U00063</td>
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<tr>
<td>ePro Shopper</td>
<td>Creates shopping carts to select goods and services. Must assign the cart to a Requestor for completion. Cannot place orders directly. Can view only their own order, invoice, and requisition history. A Shopper <strong>CANNOT</strong> also be a Requestor.</td>
<td>U00063, U00080 (optional)</td>
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<tr>
<td>ePro Receiver</td>
<td>Does online receiving for POs. This authorizes payment for POs that are not SPOs. The ePro Approver Invoice role does SPO voucher approval, which authorizes payment for SPOs.</td>
<td>A00109, F00001 or F00002, U00063, U00090</td>
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<tr>
<td>ePro Requestor</td>
<td>Creates shopping carts to select goods and services. Places orders up to $5,000, submits requisitions over $5,000 to an Approver. Does online receiving for POs. This authorizes payment for POs that are not SPOs. Can view all order, invoice and requisition history.</td>
<td>A00109, F00001 or F00002, U00063, U00084</td>
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<tr>
<td>ePro Approver</td>
<td>Approves or rejects/returns <strong>requisitions over $5,000 and Payment Vouchers</strong> in any dollar amount. Must also be designated as a Fiscal Staff Approver on relevant speedtypes. A Fiscal Approver <strong>CANNOT</strong> be a Requestor.</td>
<td>A00109, F00001 or F00002, U00063, U00081</td>
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<tr>
<td>ePro Approver Invoice</td>
<td>Receives notice of <strong>vouchers</strong> that fail match (ex: because PO receiving is not entered or contains price/quantity errors for POs and SPOs). Works with unit to resolve errors before approving vouchers. Receives notice of SPO vouchers that require approval. Responsible for verifying OK to pay before approving.</td>
<td>A00109, F00001 or F00002, U00063, U00091</td>
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</table>

### SkillSoft Courses:

- **A00105** CU: PeopleSoft Finance System – Inquiry
- **A00106** CU: PeopleSoft Finance System – Journal Entries
- **A00109** CU: Procurement – Purchasing and Contract Management
- **F00001** / **F00002** CU: Fiscal Code of Ethics or CU: Fiscal Code of Ethics – Officers
- **U00063** CU: Information Security and Privacy Awareness
- **U00080** CU: CU Marketplace – Shopper
- **U00081** CU: CU Marketplace – Approver
- **U00084** CU: CU Marketplace – Requestor
- **U00090** CU: CU Marketplace – Receiver
- **U00091** CU: CU Marketplace – Invoice/Match Exception Approver

### In-person Finance Courses:

- **A00101** CU: Financial Inquiry
- **A00102** CU: Financial General Ledger

*Register for in-person courses online at [http://www.ucdenver.edu/about/departments/finance/Pages/Training_Required.aspx](http://www.ucdenver.edu/about/departments/finance/Pages/Training_Required.aspx) or send an email to finance.access@ucdenver.edu*
OIM Login Page – https://identity.prod.cu.edu/identity

Once logged into OIM, follow these steps to request access. Note: You can make requests for yourself or for others.

- Select Denver
- Click Submit in upper right corner.
- Click Make Request on left side of screen.
- Enter the role name in the Catalog field.
- Click Add to Cart (green plus sign).
- Continue the steps above until all roles needed have been selected.
- Click Checkout in the upper right corner.
- Review the information (name, cart items).
- Any additional information can be added to the Justification box but nothing is required.
- Select Effective Date.
- Click Submit in the upper right corner.

**Hint:** Do not make the request in OIM until the day AFTER training is complete otherwise the request will be held up due to insufficient training (HCM must refresh overnight for OIM to recognize the training is complete).

Once the request is submitted, the beneficiary’s (person receiving the access) “Reports To” in HCM will receive an email from identity@cu.edu indicating a request is awaiting approval. The “Reports To” will log into OIM to approve (login, click on the request located in the Pending Tasks folder, click Claim in the upper right corner, click Approve). This action will then notify the access coordinator to provision the role.

**If you do not receive any communication from the access coordinator within two business days of making a request it is likely stalled in the process. Please contact the access coordinator if you do not receive final approval within 2-3 business days. Most requests are completed within one business day of receipt.**

Other Helpful Information:

Request Access, User Guides, Support, Known Issues
https://www.cu.edu/university-information-systems/access-it-security/request-access/oracle-identity-manager

CU Access Info – Finance/Marketplace/CIW/HCM/CU-SIS/MDM/Database/Server/VPN
https://www.cu.edu/access
Campus Security Coordinators
https://www.cu.edu/university-information-systems/campus-security-coordinators

CIW and CU-SIS Access – use PDF forms (not OIM)
https://www.cu.edu/access

Questions?? Contact Sara Esau, Finance Access Coordinator, finance.access@ucdenver.edu, 303-315-2248