Effective 3/24/25

Common Finance Access Roles & Training Requirements

CU Marketplace

ROLE NAME	ACCESS DESCRIPTION	PERCIPIO TRAINING REQUIREMENTS
ePro Inquiry	Can view all order, invoice, and related information. Role is automatically included with any Marketplace role. **Do not request unless ePro Inquiry is the only Marketplace role required.**	• F00001 • U00063 • U00208
ePro Shopper	Creates shopping carts to select goods & services. Must assign cart to ePro Requestor for completion. Cannot place orders directly. Includes capabilities of ePro Inquiry access to view all order, invoice, and related information. **Incompatible with ePro Requestor access**.	• U00063 • U00220
ePro Requestor	Creates shopping carts to select goods & services. Places orders up to $10,000, submits requisitions over $10,000 to an ePro Approver. Does online receiving for Purchase Orders which authorized payment for POs that are not BPOs. Can view all order, invoice, and requisition history. Can access Payment Voucher and Small Dollar Contract forms. Capabilities or ePro Receiver are included with this access. **Incompatible with ePro Shopper and ePro Approver access.**	• F00001 • U00063 • U00208 • U00220
ePro Receiver	Does online receiving for Purchase Orders. This authorizes payment for POs that are not BPOs.	• F00001 • U00063 • U00208 • U00220
ePro Approver	Approves or rejects/returns requisitions over $10,000 and Payment Vouchers in any dollar amount. Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant speedtypes. **Incompatible with ePro Requestor access.**	• F00001 • U00063 • U00208 • U00220
ePro Approver Invoice	Receives notice of vouchers that fail match (ex. because PO receiving is not entered or contains price/quantity errors for POs and BPOs). Works with unit to resolve errors before approving vouchers. Receives notice of BPO vouchers that require approval. Responsible for verifying OK to pay before approving. Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant speedtypes.	• F00001 • U00063 • U00208 • U00220

Finance

ROLE NAME	ACCESS DESCRIPTION	PERCIPIO TRAINING REQUIREMENTS
FIN: CU Fin Inquiry	All inquiry (no bank account, SSN), reports, query viewer, tree viewer. Access to the Finance folder in CU Data and m-FIN reports. This role should only be requested if user has no other Finance Access as it is built in.	• A00105 • F00001 • U00063
FIN: CU GL Journal Entry	Allows users to create, update, edit, copy and import Journal Entries in the Peoplesoft Finance System. Includes all functionalities of the Fin Inquiry access.	• A60052 (ILT) • A00105 • A00106 • F00001 • U00063
FIN: CU Fin Query Manager	Allows users to view and run public queries, and create, schedule and run private queries.	• A00105 • F00001 • U00063

Percipio Courses

- A00105 - CU: PeopleSoft Finance System: Inquiry
- A00106 - CU: PeopleSoft Finance System: Journal Entries
- A60052 - UCA/UCD: Finance: Journal Entry Access (Instructor-Led Training / Live Course)
- F00001 - CU: Fiscal Code of Ethics
- U00063 - CU: Information Security Awareness
- U00208 - CU: Procurement Fundamentals
- U00220 - CU: Purchasing Goods and Services with CU Marketplace