Frequently Requested Finance / Marketplace Roles

Role Name (OIM Catalog)	Description	Required Training
CU GL Journal Entry 9.2	Create, update, copy, and/or import journals. This role includes CU Fin Inquiry 9.2	A00105, A00106, F00001 or F00002, A00101*, A00102*, U00063
CU Fin Inquiry 9.2	All inquiry (no bank account, SSN), reports, query viewer, tree viewer. This role should only be requested if user has no other FIN access.	A00105, F00001 or F00002, U00063
ePro Shopper	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 **CANNOT** also be a Requestor.	U00063 U00080 (optional)
ePro Receiver	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.)	A00109, F00001 or F00002, U00063, U00090
ePro Requestor	Creates shopping carts to select goods and services. Places orders up to $10,000, submits requisitions over $10,000 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.	A00109, F00001 or F00002, U00063, U00084
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 on relevant speedtypes. A Fiscal Approver **CANNOT** be a Requestor.	A00109, F00001 or F00002, U00063, U00081
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 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.	A00109, F00001 or F00002, U00063, U00091

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 via Skillsoft. CU Denver/Anschutz > Instructor Led Training > CU Denver: Finance

CU Identity Manager (OIM) Login Page – https://identity.prod.cu.edu/identity

Do not make the request in OIM until the day **AFTER** training is completed. HCM must refresh overnight for OIM to recognize the training is complete. The request will automatically be denied if the training report has not updated.

Click the link above to be directed to the OIM login page to place a request for yourself. (Requesting for others is below)

- Select Denver
- Log into the PassportID page with your university credentials
- Click Make Request on left side of screen
- Enter the role name in the Catalog field to search for the role
- Click Add to Cart (green plus sign)
- Repeat the steps above to request multiple roles
- Click Checkout in the upper right corner
- Review the information (name, cart items)
- Any additional information can be added to the Justification box
- Click Ready to Submit – the status will change to 'ready to submit'
- Click Submit in the upper right corner
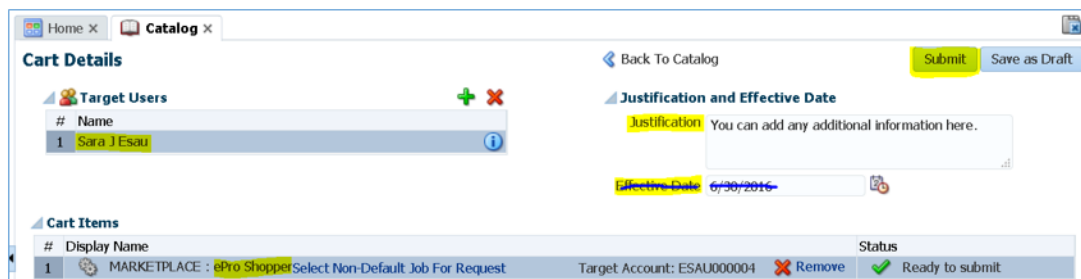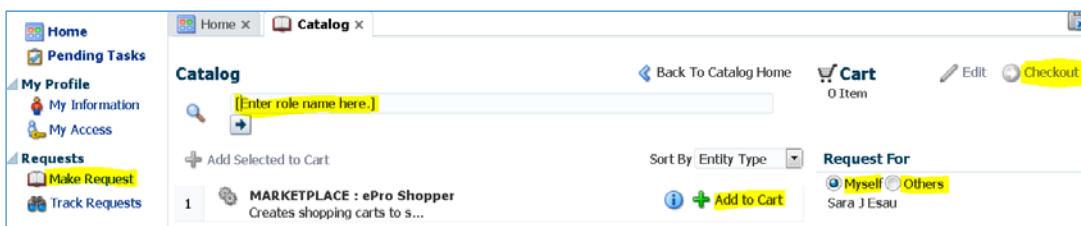
- Once the request is submitted it will go to the employee's supervisor (as listed in HCM) for approval. The listed supervisor will receive an automated email from identity@cu.edu indicating a request is awaiting approval.
- The listed supervisor will log into OIM to approve
  - Login, click on the Pending Tasks folder on the left hand side, select the request, click Claim in the upper right corner, and click Approve or Reject. If you reject the request the employee will not receive access.
- The request will then go to the Finance Access Coordinator to be provisioned. A confirmation email will be sent out once the access has been provisioned. You will see the access 24 hours after it is provisioned.

Feel free to reach out to Finance Access with any questions or concerns about this process. Most access requests are processed within 2-3 days. Please make sure to include the request id number if you need to know the status of your request. Finance Access can be reached at finance.access@ucdenver.edu.

CU Identity Manager (OIM) does allow you to make requests on behalf of other employees.

- https://identity.prod.cu.edu/identity
- Select Denver
- Log into the PassportID page with your university credentials
- Click Make Request on left side of screen
- Select Others , radio button on the right side of screen
- Click the Green Plus Sign
- Click the drop down box and select how you would like to search for the employee
- Once you have located the employee click Add Selected (User Results) and then Select (bottom of window)
  - You should see their name on the right hand side of the screen under Request For
- Enter the role name in the Catalog field to search for the role
- Click Add to Cart (green plus sign)
- Repeat the steps above to request multiple roles
- Click Checkout in the upper right corner
- Review the information (name, cart items)
- Any additional information/notes can be added to the Justification box
- Select Effective Date (selecting a future date will implement your access on that date)
- Click Ready to Submit – the status will change to 'ready to submit'
- Click Submit in the upper right corner
- The request will follow the same process of supervisor approval and Finance Access provisioning as listed above

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: Finance Access Security Coordinator, finance.access@ucdenver.edu