

## Frequently Requested Finance / Marketplace Roles

| Role Name<br>(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 <b>CANNOT</b> also be a Requestor.  | U00063<br>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 <b>CANNOT</b> 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 |

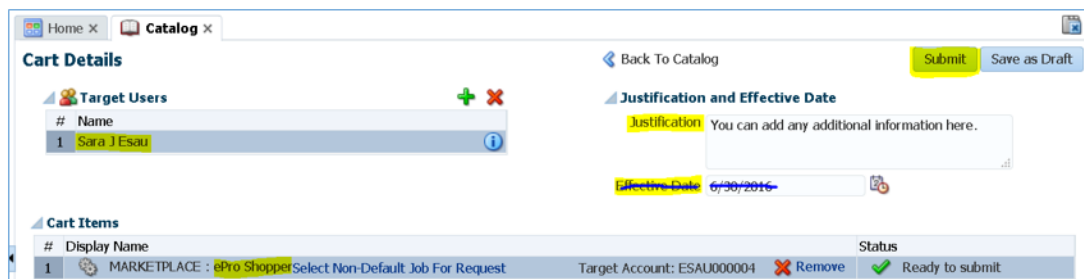
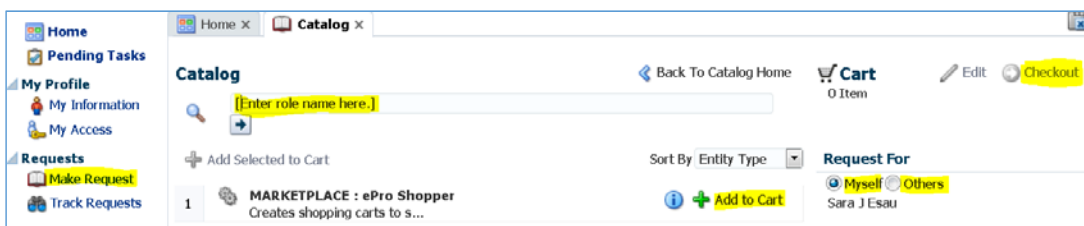
\*Register for in-person courses via Skillsoft. [CU Denver/Anschutz > Instructor Led Training > CU Denver: Finance](#)

## 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](mailto: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](mailto: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](mailto:finance.access@ucdenver.edu)