

This form is used to request new roles, modify existing roles, and/or terminate roles in the PeopleSoft Finance System and CU Marketplace. Instructions for filling out this form are available on the [AMPS Access Request Form website](#).

**USER INFORMATION**

Request Date	<input type="text"/>	Effective Date (if different)	<input type="text"/>	Dept. Name	<input type="text" value="Chemical Engineering"/>
User Name	<input type="text"/>	User Position #	<input type="text"/>	User HR Org #	<input type="text" value="10324"/>
Campus Phone	<input type="text"/>	Campus Box	<input type="text"/>	Email Address	<input type="text"/>
<input checked="" type="radio"/> User is paid from the University of Colorado's payroll system <input type="radio"/> User is a POI    If user is a POI, enter POI#: <input type="text"/>					
If paid from the University, enter Emp. ID # <input type="text"/> POIs must be set up with "Type 15 - Security Access" in the POI Maintenance Screen.					

**USER SET-UP**

<input checked="" type="radio"/> Create New User Access	<input type="text"/>	<input type="radio"/> Revise User Roles	<input type="radio"/> Create Second User ID
<input type="radio"/> Create New User - Copy Roles from Existing User	<input type="radio"/> Reinstate User Access		
<input type="checkbox"/> This is a revision of user roles (or a copy of roles from an existing user) that will result in incompatible access.			

**Role Categories** *(additional form pages will appear below as categories are selected)*

<input type="checkbox"/> Journal Entry	<input type="checkbox"/> Receivables - Billing	<input type="checkbox"/> Asset Management	<input type="checkbox"/> Procurement Service Center
<input type="checkbox"/> Inquiry, Query & Reporting	<input type="checkbox"/> Project	<input type="checkbox"/> Campus Accounting	<input type="checkbox"/> Other Specialized
<input checked="" type="checkbox"/> CU Marketplace - Dept. Roles	<input type="checkbox"/> CU Marketplace - Specialized	<input type="checkbox"/> CU Marketplace - PSC Staff Only	

## CU Marketplace - Department Roles

## CU Marketplace - All roles Required Training

CU: Information Security and Privacy - Course # U00063	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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## CU Marketplace - Shopper Additional Training

CU Marketplace - Shopper (recommended) - Course # U00080	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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## CU Marketplace - Additional Training for: Requestor, Receiver, and all Approver Roles plus role-based courses below.

Purchasing: Procurement & Contract Mgmt - Course # A00109	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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Fiscal Code of Ethics - Course # F00001	Date Taken	<input type="text"/>	Security Coord. Initials	<input type="text"/>
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Fiscal Code of Ethics - Officers - Course # F00002 (for University Officers, in lieu of Course # F00001)	Date Taken	<input type="text"/>	Security Coord. Initials	<input type="text"/>
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Must  
Take  
One

## Role-based: Training for Requestor

CU Marketplace - Requestor (Web).- Course # U00084 (required)	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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## Role-based: Training for Receiver

CU Marketplace - Receiver (Web) - Course # U00090 (required)	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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## Role-based: Training for Fiscal Approver or Fiscal Approver w/ Incompatible Access

CU Marketplace - Approver (Web) - Course # U00081 (required)	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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## Role-based: Training for Invoice/Match Exception Approver

CU Marketplace - Invoice Approver (Web) - Course # U00091 (required)	Date Taken	<input type="text"/>	Security Coordinator Initials	<input type="text"/>
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Duty	Role Name	Role Description	ADD	DEL
Shopper	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.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Requestor	ePro Requestor	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. A Requestor cannot also be a Shopper.	<input type="checkbox"/>	<input type="checkbox"/>
Receiver	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.)	<input type="checkbox"/>	<input type="checkbox"/>
Fiscal Approver	ePro Approver	Approves or rejects/returns requisitions over \$5,000 and Payment Vouchers in any dollar amount. Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes. A Fiscal Approver cannot also be a Requestor (but see Fiscal Approver IA, below).	<input type="checkbox"/>	<input type="checkbox"/>
Fiscal Approver w/ Incompatible Access	ePro Approver IA	Places orders/requisitions and approves or rejects/returns requisitions over \$5,000 and Payment Vouchers in any dollar amount. Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes. This role gives incompatible access to a Requestor if the department can justify the need and can certify to the presence of compensating controls.	<input type="checkbox"/>	<input type="checkbox"/>
Invoice/Match Exception Approver	ePro Approver Invoice	Receives notice of vouchers that fail match (e.g., because PO receiving is not entered or contains price/quantity errors for POs and SPOs); works with unit to resolve errors before approving vouchers. Must also be designated as a Fiscal Staff Approver, Fiscal Manager, or Fiscal Principal on relevant SpeedTypes. Receives notice of SPO vouchers that require approval; responsible for verifying OK to pay before approving.	<input type="checkbox"/>	<input type="checkbox"/>
Inquiry	ePro Inquiry	Can view all order, invoice, and related information. Automatically included with any Marketplace role: do not request unless Inquiry is the only Marketplace role desired.	<input type="checkbox"/>	<input type="checkbox"/>

## REQUIRED SIGNATURES

If you need help setting up an Adobe Digital Signature, view the [Creating a Digital Signature Step-by-Step Guide](#).

## User Certification Statement

By signing this request, I certify that I have read, understand, and will abide by the [IT Security Program Policy](#).

User Signature

Date

User Supervisor/Sponsor\* Name

User Supervisor's E-mail Address

[Submit Form to Supervisor](#)

## Supervisor/Sponsor\* Certification

By signing this request, I certify that the information submitted on this form is accurate and complete, and that the user has been provided with and instructed to read and abide by the [IT Security Program Policy](#).

Supervisor/Sponsor\* Signature

Date

\*Sponsor is applicable only to requests for access on the part of users who are not paid from the university's payroll system and whose supervisor is not a university employee.

## Campus Finance System Access Coordinator - What Happens Next?

After user and supervisor signatures are obtained and the compensating control certification is completed if required, forward to the Campus Finance Access Coordinator by selecting the appropriate campus. The coordinator's signature indicates their concurrence with the requested access. The Campus Finance Access Coordinator will make any necessary corrections to the request, then will send completed requests to UIS for processing. Requests related to IDs that also have access to the HR System will be confirmed with the Campus HR Access Coordinator and may take longer to process.

Select your campus: [Return to User](#)[Submit to Finance System Coordinator](#)

## Campus Finance System Access Coordinator

By signing this request, I concur with the Finance System Access being requested for the User ID noted on this form and I certify that all required training courses have been completed.

Campus Finance System Access Coordinator Signature

Date

[Return to User](#)Journal Source Code: ☐ Temporary Access (for training completion)[Submit Form to UIS](#)

UIS will establish a User ID number for new IDs. The user and the supervisor will be informed of new ID numbers or other changes by email to the email addresses listed on the form. It is to the user's advantage to write their address clearly so the notification can be delivered. Requests to delete all Finance access will be confirmed to the supervisor and the Campus Finance Access Coordinator.