

Common Roles Requested Using OIM

| Type of Access  | Role Name in OIM Catalog   | Method of Training | Training courses Required                       | Skillsoft Library ID    |
|---|--|--------------------|---|-------------------------|
| Finance Inquiry/Query<br>(Automatically provided with Journal Entry access)     | FIN: CU Fin Inquiry 9.2<br>FIN: CU Query Manager   | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Finance System - Inquiry                        | _scorm12_cu_a00105_0001 |
| Finance Journal Entry<br>Finance Journal Approver                               | FIN: CU GL Journal Entry 9.2 (create)<br>FIN: CU WF Journal UCB Dept Appr<br>(approver - may need other specialized approval roles, check with CCO Finance Access Coordinator before requesting) | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  | Classroom          | Finance System - Inquiry                        | _scorm12_cu_a00105_0001 |
|   |  |                    | Finance System - Journal Entry                  | _scorm12_cu_a00106_0001 |
|   |  | Classroom          | UCB: PeopleSoft Finance Training                | ilt_A10119              |
| Central Information Warehouse (CIW)   | Not available in OIM; complete form*   | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
| CU Marketplace - Shopper  | MARKETPLACE: ePro Shopper  | Skillsoft          | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | CU Marketplace Shopper (Recommended)            | _scorm12_cu_u00080_0001 |
| CU Marketplace - Requestor  | MARKETPLACE: ePro Requestor  | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Procurement, Purchasing and Contract Management | _scorm12_cu_a00109_0001 |
|   |  |                    | CU Marketplace Requestor                        | _scorm12_cu_u00084_0001 |
| CU Marketplace - Receiver   | MARKETPLACE: ePro Receiver   | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Procurement, Purchasing and Contract Management | _scorm12_cu_a00109_0001 |
|   |  |                    | CU Marketplace Receiver                         | _scorm12_cu_u00090_0001 |
| CU Marketplace Approver   | MARKETPLACE: ePro Approver<br>or MARKETPLACE: ePro Approver IA<br>if requested with Requestor access with completed Compensating Controls  | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Procurement, Purchasing and Contract Management | _scorm12_cu_a00109_0001 |
|   |  |                    | CU Marketplace Approver                         | _scorm12_cu_u00081_0001 |
| CU Marketplace Invoice Match/<br>Exception Approver                             | MARKETPLACE: ePro Approver Invoice   | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Procurement, Purchasing and Contract Management | _scorm12_cu_a00109_0001 |
|   |  |                    | CU Marketplace Invoice Match/Exception Approver | _scorm12_cu_u00091_0001 |
| CU Marketplace - Inquiry Only<br>(Cannot have any other role in CU Marketplace) | MARKETPLACE: ePro Inquiry  | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Procurement, Purchasing and Contract Management | _scorm12_cu_a00109_0001 |
| GM Grants Inquiry   | FIN: CU Grants Inquiry Only  | Skillsoft          | Fiscal Code of Ethics                           | _scorm12_cu_f00001_0001 |
|   |  |                    | Information Security and Privacy Awareness      | _scorm12_cu_u00063_0001 |
|   |  |                    | Finance System - Inquiry                        | _scorm12_cu_a00105_0001 |

For Roles not listed, please coordinate with your CCO Finance Access Coordinator before requesting those roles in OIM.

\* For CIW access, complete the form on the UIS access website: <https://www.cusys.edu/ums/security/CUonly/AMPS/Forms/CIW-Access-Request-Form.pdf>

The classroom course for General Ledger/Journal Entry is offered by the CCO on the second Tuesday of every other month (Feb, Apr, Jun, Oct, Dec) except August.

Registration is handled through Skillsoft for this course, under Instructor Led Courses, search for UCB PeopleSoft Finance Training.