

## **PSC Skillsoft Courses** <sup>[1]</sup>



**There are many online courses available in your campus portal <sup>[2]</sup>. On the CU Resources Home page, select the Percipio tile.**

To determine which set of training requirements are needed for access please see [Access & Training Requirements](#) <sup>[3]</sup>.

## Travel & Expense

| Course Title<br>(includes link)   | Description   | Who Should Take This Course?  |
|---|---|---|
| <a href="#"><u>CU: Travel and Travel Card Training</u></a> <sup>[4]</sup>     | Learn the policies and procedures related to official university business travel.   | This course is mandatory to obtain a travel card. Additionally, it is recommended for those who travel, approve travel, or arrange travel for others. |
| <a href="#"><u>CU: Requesting Cash Advances for Travel</u></a> <sup>[5]</sup> | If you are planning a trip for official university business, you may be able to request a cash advance. This course describes policies and procedures for requesting a cash advance. It also lists your responsibilities when obtaining and reconciling a cash advance. | This course is required for any employee requesting or approving a cash advance for university travel.  |

## Procurement Card

| Course Title<br>(includes link)  | Description  | Who Should Take This Course?   |
|--|--|--|
| <a href="#"><u>CU: Procurement Fundamentals</u></a> <sup>[6]</sup>             | This course provides an overview of procurement at the university, including terminology, services, processes, policies, and more. This course is also a pre-requisite for role-specific courses required for access. You must take the quiz and score 80% or higher to receive credit for completing this course. | This course is required for anyone requesting a procurement card.  |
| <a href="#"><u>CU: Procurement Card Cardholder Training</u></a> <sup>[7]</sup> | Learn about the policies and procedures governing the use of the procurement card, as well as about your individual responsibilities as a cardholder.  | Individuals who request the procurement card (University of Colorado Visa card) in order to make small-dollar purchases for their departments. |

**CU: Procurement Card Approving Official Training** <sup>[8]</sup>

In this course, you will learn about your responsibilities as an approving official (AO) for the procurement card program, and how to fulfill those responsibilities efficiently.

Individuals designated to serve as approving officials in the departmental procurement card program.

## CU Marketplace

| Course Title (includes link)  | Description   | Who Should Take This Course?  |
|---|---|---|
| <b><u>CU: Procurement Fundamentals</u></b> <sup>[6]</sup>                       | <p>This course provides an overview of procurement at the university, including terminology, services, processes, policies, and more. This course is also a pre-requisite for role-specific courses required for access. You must take the quiz and score 80% or higher to receive credit for completing this course.</p>                   | This course is required for anyone requesting access to CU Marketplace. |
| <b><u>CU: CU Marketplace - Purchasing Goods and Services</u></b> <sup>[9]</sup> | <p>This course introduces new users of CU Marketplace to using the system for purchasing items for their departments. Covers the overall process of purchasing based on roles users have in CU Marketplace, including creating and submitting shopping carts, submitting requisitions, approving requisitions, and authorizing payment.</p> |   |

**CU: CU Marketplace - Invoice/Match Exception Approver**  
[10]

This required course will provide you with information about approving SPO vouchers, and handling SPO/PO vouchers with match exceptions, within CU Marketplace.

Individuals who need the ePro Approver Invoice role so they can become the Invoice/Match Exception Approver within CU Marketplace.

**CU: CU Marketplace - Receiver** [11]

This required course will provide you with information about receiving within CU Marketplace. It is not required if you have completed the CU Marketplace Requestor online course and passed the quiz.

Individuals who have, or who wish to have, the Receiver role within CU Marketplace.

**CU: CU Marketplace - Shopper** [12]

This optional, but highly recommended, course will provide you with information about shopping within CU Marketplace. We encourage you to submit the acknowledgment at the end for completion of this course to become part of your training record.

Individuals who have, or who wish to have, the Shopper role within CU Marketplace.

**CU: CU Marketplace - Approver** [13]

This required course will provide you with information about approving requisitions within CU Marketplace.

Individuals who need the Approver role for requisitions within CU Marketplace.

**CU: CU Marketplace - Requestor** [14]

This required course will provide you with information about shopping and submitting orders within CU Marketplace.

Individuals who need the requestor role within CU Marketplace.

## Procurement-Related

| Course Title<br>(includes link) | Description | Who Should Take This Course? |
|---------------------------------|-------------|------------------------------|
|---------------------------------|-------------|------------------------------|

**CU: Fiscal Code of Ethics** <sup>[15]</sup>

In this course, you will learn about the University's Fiscal Code of Ethics (focusing specifically on the Employee Code) and how to apply it in your daily work life.

University employees (full-time, part-time, temporary, seasonal, or hourly). Affiliate fiscal staff who conduct fiscal transactions on behalf of the University

**CU: Fiscal Code of Ethics - Officers** <sup>[16]</sup>

This will help you understand Officer requirements for ethical behavior in the conduct of official university business.

Officers of the University and Officers of the Administration are required to take this record of acknowledgment.

**CU: Gift Fund Management** <sup>[17]</sup>

Gift funds require careful management. Understand the different types of gifts, learn about acceptance and deposits to the foundation and to the university, and learn the relationship between foundation funds and university gift fund SpeedTypes. Required for individuals with a fiscal role on a gift fund (Fund 34) SpeedType and for individuals who approve Fund 34 journal entries, Concur transactions, or CU Marketplace transactions.

Individuals with fiscal roles (fiscal principal, fiscal manager, or fiscal staff) on Gift Fund (Fund 34) SpeedTypes. Individuals who handle gift funds for CU (including those who create or approve Fund 34 journal entries, Concur transactions, or CU Marketplace transactions).

Recommended for anyone who works with gift funds on a regular basis.

Once you've completed all of the required trainings, follow instructions provided by University Information Services <sup>[18]</sup> on obtaining access.

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## Resources

- [Access Concur via your campus portal](#) <sup>[19]</sup>
- [Access and Training Requirements](#) <sup>[3]</sup>
- [Process Guide for Requesting Access](#) <sup>[18]</sup>

## Related Articles

- [Concur Request: Applying to be an Approving Official](#) [20]
- [Concur Request: Applying for a Procurement Card](#) [21]
- [Concur Request: Apply for a Managed Spend Card](#) [22]
- [Concur Request: Applying for a Travel Card](#) [23]
- [Concur Travel: Requesting Cash Advances for Travel](#) [24]

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## Policies and Procedures

[VIEW ALL PROCEDURES](#) [26]

### Groups audience:

Procurement Service Center

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**Source URL:**<https://www.cu.edu/psc/get-help/learning-resources/psc-skillssoft-courses>

### Links

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[3] <https://www.cu.edu/controller/training/access-training-requirements>  
[4] [https://share.percipio.com/cd/kbRLy\\_Zkn](https://share.percipio.com/cd/kbRLy_Zkn) [5] [https://share.percipio.com/cd/hg8Q3RMz\\_](https://share.percipio.com/cd/hg8Q3RMz_)  
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[25] <https://pschelp.cu.edu/s/> [26] <https://www.cu.edu/psc/procedures>