

## Stay in the Loop – Get the Scoop! Attend a Campus Forum

*There's a lot going on in finance and procurement these days, and here's a chance to get all of the updates.* The Office of University Controller and the Procurement Service Center will present a series of campus forums during the last week of September and first week in October. The format will consist of panelist presentations, accompanied by a PowerPoint slide show. Each forum will offer an opportunity for Q & A and feedback. Topics to be covered include:

- Administrative Policy Statement Propriety of Expenses (and associated documents)
- PSC Procedural Statement Recognition and Training
- PSC Procedural Statement Sensitive Expenses
- SPO Encumbrances
- Expenditure Control
- Reporting System

Attendance is recommended for CU employees or affiliates who are involved in fiscal management or for those who seek a greater understanding of upcoming finance and procurement initiatives. Forum schedule and registration information are available at [http://www.cu.edu/controller/ouc\\_training\\_courses.html](http://www.cu.edu/controller/ouc_training_courses.html). **Please pre-register** to ensure we do not exceed room capacity and also to ensure the correct numbers of handouts are available.

### Questions of the Week

Each week the Finance and Procurement Help Desk pulls together the top questions from the previous week. Here's a look at what's on your mind - the new reporting system and the portal. Read on for more *or* check out the [OUC web site](#). **Note:** Reports have been burst to UCDHSC, UCCS, and System. Boulder's first burst will be in early October.

- What should I see in the first (top) channel of my portal?  
*If you are listed as the Program/Project Fiscal Principal, Program/Project Fiscal Manager, or SpeedType Fiscal Staff for one or more SpeedTypes in the Finance System:* you should see a single report – presently, a current report chosen at random, but in the future, the most current Revenue and Expense Statement Summary for your highest fiscal role. If there was no activity for the SpeedType(s), you will see a message indicating that your latest report is not available. *If you are not listed in any of the above fiscal roles:* you should see a message indicating that your latest report is not available.
- What should I see in the second (middle) channel?  
*If you are listed as the Program/Project Fiscal Principal, Program/Project Fiscal Manager, or SpeedType Fiscal Staff for one or more SpeedTypes in the Finance System:* you should see drop-down lists of reports for those SpeedTypes. To view the reports, select the date, the SpeedType, and the report(s) from the corresponding drop-downs and click the View Report(s) button. To view multiple reports, hold the SHIFT key down while selecting report titles. If you have opened multiple reports, press ALT and TAB simultaneously to switch between reports. *If you are not listed in any of the above fiscal roles:* you should see a message that you have no reports to view.
- What about the third (bottom) channel of my portal?

### Questions *continued*

*If you are authorized to use the Finance System:* you should see links to the Reporting System. You can go there to run additional reports, such as for different SpeedTypes or time periods. *If you are not authorized to use the Finance System:* you should see a message stating that you do not have access to the Reporting System...and that you should contact your campus controller if you think you need this access.

- What, exactly, is the portal and how do I access it?  
*The portal is your gateway to University information – both personal (pay advice, job position information, etc.) and general (useful links, campus/System newsletters, announcements, burst financial reports, and so on). For most of CU System, the portal address is <https://my.cu.edu>. For Boulder campus, the portal address is <https://cuconnect.colorado.edu>. (Keep in mind that reports haven't been burst to Boulder yet. Look for them in early October.) The main page of each portal instructs you how to log in. Note that although you can log in to the portal from any computer, you will need to use a computer with a University IP address in order to open the financial reports in the portal.*
- What if I think I should be receiving burst reports in my portal, but I'm not?  
*First, remember that reports have not yet been burst to Boulder. As stated above, Boulder's burst is scheduled for early in October. For other campuses, be sure you are using Internet Explorer (you need a version that is "compatible; MSIE 6.0") to access the portal. (To test, click [Check my Browser](#).) Then, verify that you have been assigned a fiscal role. In the Finance System, go to General Ledger-->ChartFields--> SpeedTypes and look up your SpeedType(s). You'll see fiscal role assignments on the Org/Program/Project Attributes and Add'l SpeedType Attributes pages. If you need help, contact the Finance & Procurement Help Desk at 303.315.2846 or email [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu). (To request a change in fiscal role assignments, contact your campus Controller's office.)*

### CONNECTIONS NEWSLETTER

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