

Step-by-Step Guide

Getting Access to the Cognos m-Fin Reports

Who is authorized to access the Cognos Reporting System?

University employees whose names and email addresses appear in CU's *active directory* are automatically authorized to access the Cognos Reporting System.

Who is authorized to access the Cognos m-Fin Reports?

Although all University employees whose names and email addresses appear in CU's active directory can access and log in to the Cognos Reporting System, only employees with a Finance Fiscal role on a SpeedType, or employees with access to the PeopleSoft Finance System, will be able to access the Finance folder, which houses the Cognos m-Fin Reports.

Fiscal Roles

Finance Fiscal Roles include Fiscal Officers, Fiscal Principals, Fiscal Managers, and Fiscal Staff, as follows:

- **Fiscal Officers:** President, Chancellors, Vice Presidents, Secretary, Treasurer, Associate/Assistant Vice Presidents, Vice Chancellors, Associate Vice Chancellors, & Deans.
- **Fiscal Principals:** Chairs & Directors (or equivalent), & Principal Investigators.
- **Fiscal Managers:** Departmental Administrators (or equivalent).
- **Fiscal Staff:** Employees (Managerial and Non-managerial).

To be added as a Finance Fiscal Role on a SpeedType, you will need to complete the SpeedType Request page of the Chartfield Request Form located at <https://www.cu.edu/controller/forms/finance.html>.

PeopleSoft Finance System Access

To gain inquiry access to the PeopleSoft Finance System, you will need to take the CU: Financials-Inquiry and the CU: Fiscal Code of Ethics online Skillport courses. To gain additional access, such as creating and approving journal entries, you will also need to take the CU: Financials – General Ledger online Skillport course, and the Financial – General Ledger classroom training. You will also need to complete and submit the [Financial System Access Request form](#).