

SOLAR ACCESS REQUEST FORM
Financials Module

1. USER INFORMATION:

Last Name: _____ First: _____ M.I.: _____ Employee ID #: _____
 Job Title: _____ Effective Date: _____
 Email: _____ Extension: _____ Dept. ID #: _____
 Dept. Name: _____ *For Gatekeeper's use only:* Operator ID#: _____
 CFS ID#: _____

2. EMPLOYEE STATUS:

Permanent Temporary Non-CSUN Auxiliary

3. ROLES: (Recon Tools/Queries are automatically included in the request)

ADD	DELETE	Enter Requisitions:	Purchase goods and services with outside vendors.
ADD	DELETE	Enter Chargebacks:	Purchase goods and services provided by campus service providers.
ADD	DELETE	Financial Approver:	Approve requisitions and chargebacks in a department.
ADD	DELETE	Reconciliation Tools:	View GL, purchase order and chargeback summary and query data.
ADD	DELETE	Transfer Budgets:	Transfer budgets between departments.
ADD	DELETE	View Financial Reports:	View financial management reports (<i>nVision</i>).
ADD	DELETE	Run Financial Reports:	Run financial management reports (<i>nVision</i>) - Limited.
ADD	DELETE	Other: _____	

4. DEPARTMENT# OR DIVISION NAME FOR ROLES (DO NOT ENTER IN BOTH FIELDS BELOW):

Department #: _____ **OR** Area Name/Node: _____

5. SIGNATURE/APPROVALS:

Applicant's Supervisor, Division/College Administrator: My signature certifies that the named employee requires access to data within SOLAR to perform their job duties. I understand that it is my obligation to ensure that adequate training is provided to the employee in compliance with State and Federal laws and University policies governing access to information contained in employee, applicant and student records.

Applicant's Supervisor:	Print: _____	Signature: _____	Date: _____
	Extension: _____	Email: _____	@csun.edu
Div./College Administrator:	Print: _____	Signature: _____	Date: _____
Security Gatekeeper:	Print: _____	Signature: _____	Date: _____
	Extension: _____	Email: _____	@csun.edu
Security Administrator:	Print: _____	Signature: _____	Date: _____

6. APPROVAL OF ROLES ACCESSING CONFIDENTIAL INFORMATION:

VP, Finance & Administration: Print: _____ Signature: _____ Date: _____

SOLAR ACCESS REQUEST FORM - FINANCIALS MODULE INSTRUCTIONS

This form is to request access for the SOLAR Financials module. Incomplete forms may delay processing of the access requested.

1. USER INFORMATION:

All fields except for *gatekeeper's use only* are mandatory in this section.

2. EMPLOYEE STATUS:

Select the employee status. If the employee is a student worker, contact Solar Financials Help Desk prior to submitting a request form.

3. ROLES:

A [Confidentiality Statement](#) must be on file for all SOLAR Financial roles.

Enter Chargebacks and Enter Requisitions: These roles require training prior to granting access. It can be provided by someone in the area, utilizing our online training or attending our [Requisition and Chargeback training classes](#) offered monthly. The *Applicant's Supervisor* and *College or Division Administrator* is responsible for ensuring the completion of appropriate training for the requested roles and submitting email certification that training has been completed.

Financial Approvers: An [Authorized Signature form](#) must be on file in Financial Services prior to granting access.

Reconciliation Tools: *Viewing GL, purchase order and chargeback summary and query data* are automatically included in the roles listed above.

View Financial Reports and Run Financial Reports: Select one role only. *View or Run Financial Reports* are for nVision financial management reports only. *Run Financial Reports* requires justification be entered in the *other* field of this section. *Run Financial Reports* is a limited role.

4. DEPARTMENT# OR DEPARTMENT TREE NODE FOR ROLES:

Indicate the department number or tree node for the requested access. Access requested for multiple departments would require the tree node to be entered. **DO NOT ENTER DEPARTMENT # AND TREE NODE.**

5. SIGNATURE/APPROVALS:

This form must be signed by the *Applicant's Supervisor* and *College or Division Administrator*.

6. APPROVAL OF ROLES ACCESSING CONFIDENTIAL INFORMATION:

The gatekeeper will obtain the VP's signature when required.

DELIVERY INFORMATION:

This form should be sent to the Solar Financials Gatekeeper for approval and processing. An email will be sent after the access request has been processed.

Preferred Delivery Method - Electronic Delivery: Access the *myNorthridge* portal login located at the *CSUN* home page. Go to the *Technology* pagelet and select *Request Technical Support*. Select *My Cases*, then select *Create a new case* to create the service request. Select *SOLAR Financials* in the Product/Category drop down menu. Attach the scanned form to the case and then select *Submit Service Request*.

Campus Mail or Personal Delivery:

Solar Financials Gatekeeper
University Hall, Suite UN-360
solarfin@csun.edu
Mail Code: 8337