

ACCESS CONTROL CHARGEBACK INSTRUCTIONS

Creating a CHARGEBACK REQUISITION (on campus only)

Click on Solar Financials (1), Chargebacks (2), Chargebacks (3), then Add a New Value (4)



Menu

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Chargebacks
Enter any information you have and click Search. Leave fields blank for a list of all values.

4 Find an Existing Value Add a New Value

Business Unit: = NRCMP

Chargeback Provider: begins with

Requisition ID: begins with

Requestor Position Nbr: begins with 99740051

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Select Chargeback Provider (5) enter PPM, click on Add (6)
Example: PPM

Chargebacks

Find an Existing Value Add a New Value

Business Unit NRCMP 5

Chargeback Provider PPM 5

Requisition ID NEXT

6 Add

Select Approver (7), then enter one dollar for an estimate or actual dollar amount if known for this chargeback (8) and click Chbk Details (9). *Standard pricing for keys can be located at www.csun.edu/facilities/ppm-services/XXXXX.

Chbk Header | **Chbk Details** | Chbk Funding | Chbk Email Workflow

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/06/2019

Requestor: Estimate EstTime: 30 Days

*Approver: Estimate Estimated Amt: Hold: *Status: Open

Work Status: New In Process: N *Amount: Actual Amount:

Print Requisition

Save Previous tab Next tab Add Update/Display

Chbk Header | Chbk Details | Chbk Funding | Chbk Email Workflow

Fill in required information in red (10)

Chbk Header | **Chbk Details** | Chbk Funding | Chbk Email Workflow

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/06/2019 Status: O

*Contact Name: *Date Needed by: 03/06/2019

*Contact Phone: Fax:

*Email ID: Mail Drop:

*Location: Keys Required

*Department Name: Attachment

*More Information: Service Provider Notes:

Next Section --> Key Lock Shop Standard Pricing Lookup -->

Physical Plant Management
Work Control Center: X2222
Main FAX: X4883

Save Previous tab Next tab Add Update/Display

Chbk Header | Chbk Details | Chbk Funding | Chbk Email Workflow

Click on Key Lock Shop (11)

Chbk Header | Chbk Details | Chbk Funding | Chbk Email Workflow

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/06/2019 Status: O

*Contact Name: *Date Needed by: 03/06/2019

*Contact Phone: Fax:

*Email ID: Mail Drop:

*Location: Keys Required

*Department Name: Attachment

*More Information: Service Provider Notes:

Next Section --> **Key Lock Shop** Standard Pricing Lookup -->

Physical Plant Management
Work Control Center: X2222
Main FAX: X4883

Save Previous tab Next tab

Add Update/Display

Chbk Header | Chbk Details | Chbk Funding | Chbk Email Workflow

Print Approval Signature page and complete form with Approving Names and Signatures (12).
Approval page attachment to be attached in next step (13)

Campus Lock Shop

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/06/2019 Status: O

Key Holder Information Keys Requested

Please Print this form and submit with order Personalize | Find | View All | First 1 of 1 Last

Empl ID	Last Name	First Name	*Title	*Location Code	Description	Key #	*Key Type	Billing Rate	*Quantity	Total
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

AV, DK, CA require no signature

DM, requires the Dean, Dept. Chair, Head of Dept. (Approving Signature 1) 12

BM, requires both (Approving Signature 1 and Approving Signature 2)

Approving

Signature 1: _____
(DEAN, DEPT. CHAIR, HEAD OF DEPARTMENT)

Print Name: _____

Title: _____ Date: _____

Approving

Signature 2: _____
(DIRECTOR OF PPM-If Required)**

Print Name: _____

Title: _____ Date: _____

Approving

Signature 3: _____
(DIRECTOR OF PUBLIC SAFETY-If Required**)

Print Name: _____

Title: _____ Date: _____

** APPROVAL MAY VARY DEPENDING ON THE KEY SECURITY LEVEL. PPM WILL ADVISE WHEN A HIGHER APPROVAL IS NEEDED.

OK Cancel

Attach (13) Approval Signature form and Lock Shop Information Request Form from Page 1.
Click OK (14)

Chargeback Attachments

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/12/2019 Status: O

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

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Add Attachment

OK 14 Cancel

Click on Chbk Funding tab (15), fill out required description and funding strip (16).

Chbk Header Chbk Details Chbk Funding 15 Chbk Email Workflow

Unit: NRCMP Provider: PPM Physical Plant Management Req ID: NEXT Req Date: 03/06/2019 Status: O

For Auxiliary Funding (Please allow 48 hrs. for approval)

Customer ID: PO AUX Approval (FIN): NA
Address Type: B SeqNum:

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*Description:

*Account: *Fund: *Department: *Program: Class: Project:

Save Previous tab Next tab Add Update/Display

Chbk Header | Chbk Details | Chbk Funding | Chbk Email Workflow

Click back to Chbk Header tab (17), click in Hold checkbox (18), Save (19), answer “Yes”. Status should be Pending. You will get a new requisition number (20). Click Print Requisition (21) and print a copy.

Once the “Save” operation is completed, PPM Work Control will receive the request, which in turn will be forwarded to the PPM Lock Shop for completing the work order or providing the estimate.

If an estimate is requested, once completed, PPM Work Control will return the requisition to the Requestor. The Requestor is responsible for forwarding the request to the Approver who will view/approve/deny the requisition.

If approved, the requisition will be sent to PPM Work Control who will forward it to the responsible PPM Shop for scheduling and completing the work.