

FINANCIAL APPROVER ADMINISTRATION REFERENCE GUIDE

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This guide is designed to provide you with the information you need to successfully use the Financial Approver Administration module, including the following topics:

- [Accessing the Campus Web Portal](#)
- [Adding a Financial Approver](#)
- [Deleting a Financial Approver](#)

FINANCIAL APPROVER ADMINISTRATION OVERVIEW

A financial administrator is defined as anyone with the authority to designate financial approvers for campus departments. The Financial Approver Administration module allows financial administrators at the division or college level to assign financial approvers for approval of online **requisitions and chargebacks**.

- Approvers must have [Authorized Signature form](#) or [State Trust Account application](#).
- Financial approvers must be established for all departments and/or one approver must be assigned at the tree node level.
- Financial approvers assigned to a department and/or tree node, will have access to all financial approval transactions for requestors within their departments and/or tree node.
- Multiple approvers can be assigned to specific departments and/or tree nodes.
- Updates will reflect in the Online Requisition or Chargeback modules the next business day.

TREE NODE VERSUS DEPARTMENT

A tree node encompasses one or many sub nodes and departments. Granting access by node eliminates assigning approver access for every single department within a tree node.

Once an approver is assigned access to a tree node, they become approvers for all sub nodes and departments within that node. The financial administrators have the option of drilling down and assigning additional approvers to a department.

FINANCIAL ADMINISTRATOR ACCESS

A [SOLAR Financial Access Request Form](#) must be submitted to request access for the financial administrator role (**NRFDW Financial Administrator**). This role allows the user to add, delete and make changes to financial approvers' assignments.

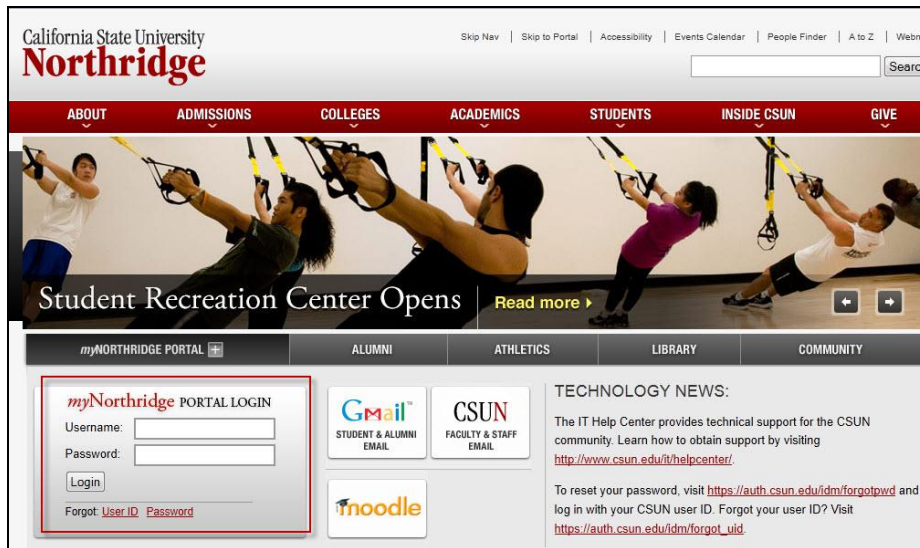
WHO DO I CONTACT FOR HELP?

Create a [Service Request](#) to Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-6685.

ACCESSING THE CAMPUS WEB PORTAL

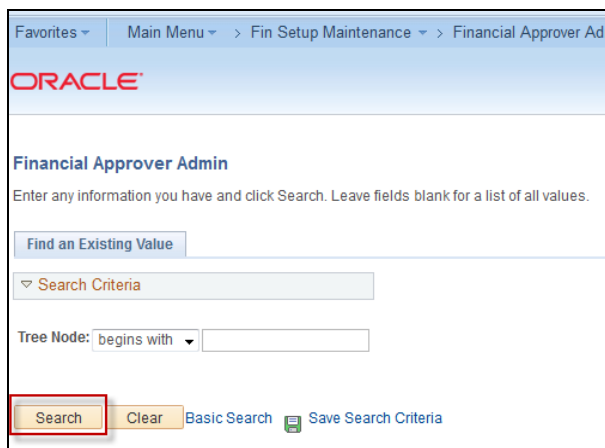
SOLAR applications are housed within the Campus web portal. Follow the instructions below to access the Campus web portal:

1. From an **Internet Browser**, access the **myNorthridge portal login** located on the [CSUN](#) home page.
2. Log in using your **CSUN ID#** and **Password**.
3. Select the **Login** button.

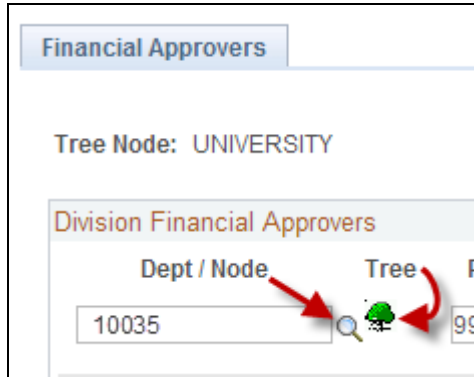


ADDING A NEW APPROVER:

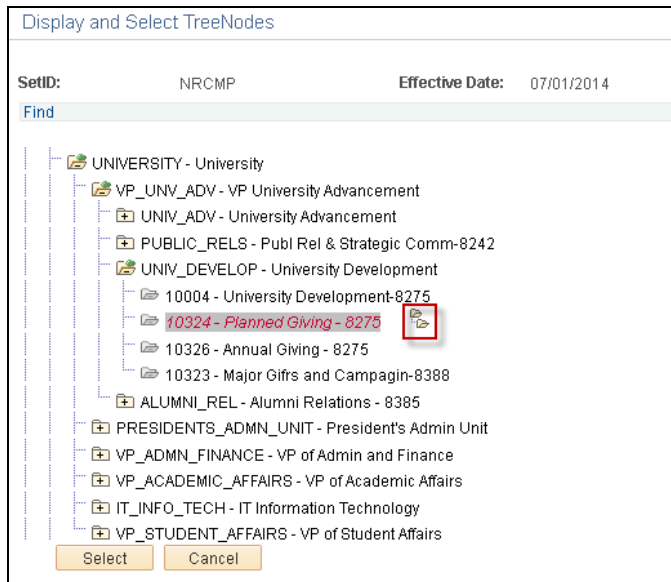
1. From **myNorthridge Menu** pagelet, select the following menu path:
SOLAR Financial>Fin Setup Maintenance>Financial Approver Admin
2. On the Financial Approver Admin page, leave the Search field blank and select the **Search** button.



3. On the bottom of the page, select the **Add Entry** button to add a new line.
4. Enter the **Dept** or **Node**. If unknown:
 - **Dept:** Select the **magnifying glass** icon to select a specific **Dept**.



- **Node:** Select the **Tree** icon to choose a **Tree Node**. Choose a specific node or click on the folders to drilldown until the desired node displays, followed by the **Select** button.

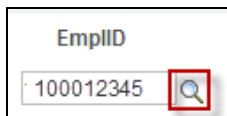


- A **Double Open Folder icon** displays to the right of the node name when the node is selected.

5. Enter the Employee's **Position No**. If unknown, select the **magnifying glass** icon to search.



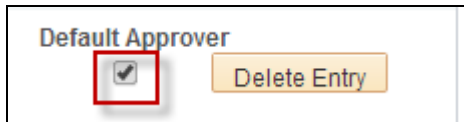
6. Enter the Employee's **EmplID**. If unknown, select the magnifying glass icon to search.



- The **EmplID** field defaults to the applicable employee ID associated with the position number.
- If there are multiple employees in one position, the employee ID does not default. Select the **Magnifying Glass** icon to view a list of employees associated with the position number to select the applicable employee.

7. Select the **Default Approver** check box, if applicable.

- The Online Requisition and Chargeback modules populate the **Approver** field with the default approver designated for a department.

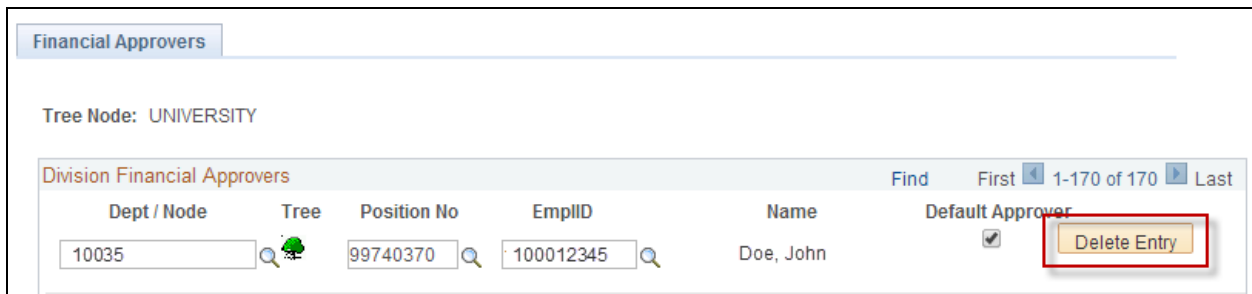


8. Select the **Add Entry** button to add additional approvers.

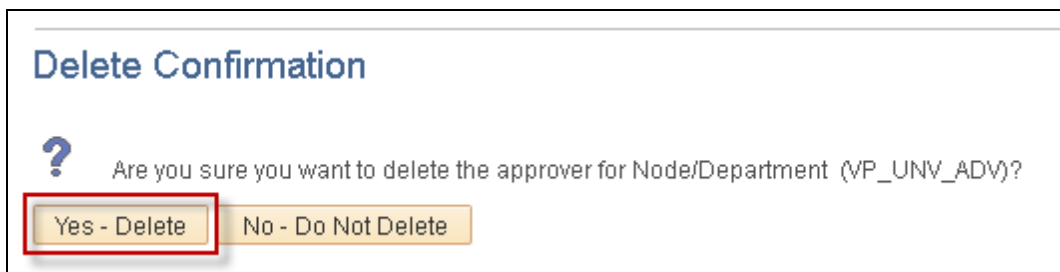
9. When all applicable approvers have been added, select the **Save** button, followed by the **OK** button.

DELETING AN APPROVER:

1. Select the **Delete Entry** button on the line of the approver to be deleted.



2. Select **Yes - Delete** button in the Delete Confirmation pop up window.



3. Repeat steps 1 – 2 to delete multiple approvers.

4. When completed, select the **Save** button in the Financial Approver page.