

APPROVE, CANCEL AND REOPEN ONLINE REQUISITIONS

University Hall 365

Phone: (818) 677-1000, Option 2, Option 2

Mail Code: 8337

This guide is designed to provide information to successfully use the SOLAR Financials Online Requisition module, including the following topics:

- [Accessing the Online Requisition Module](#)
- [Approve, Cancel, or Reopen Online Requisitions](#)

Employees must submit a [SOLAR Financial Access Request](#) form, selecting Financial Approver. An [Authorized Signature form](#) must also be submitted.

WHO DO I CONTACT FOR HELP?

SOLAR Financials is available to answer SOLAR Financial questions at:

Email: solarfin@csun.edu

Call: (818) 677-1000, Press 2, Press 1

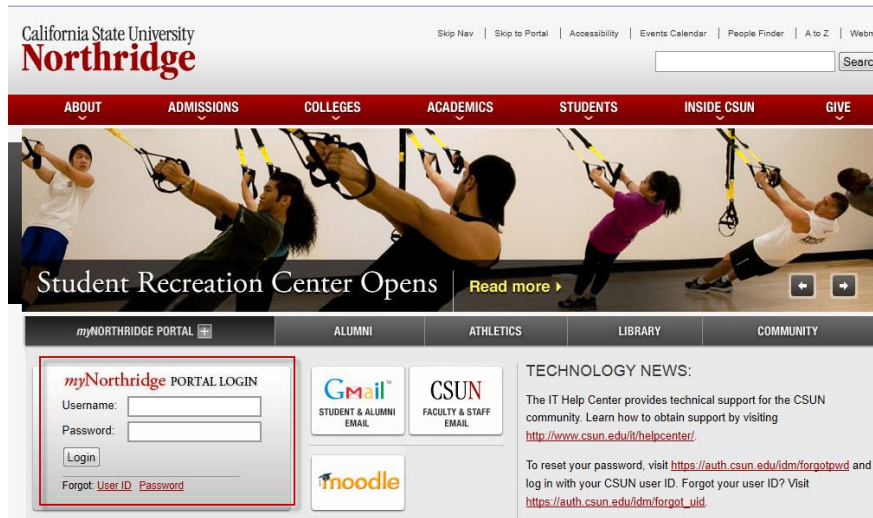
FISCAL RESPONSIBILITY

The SOLAR Online Requisition module does not budget check. It is the responsibility of the requisition Approver to ensure that purchasing expenses are within the department budget. To ensure this responsibility, the campus has instituted the Fiscal Responsibility Policy.

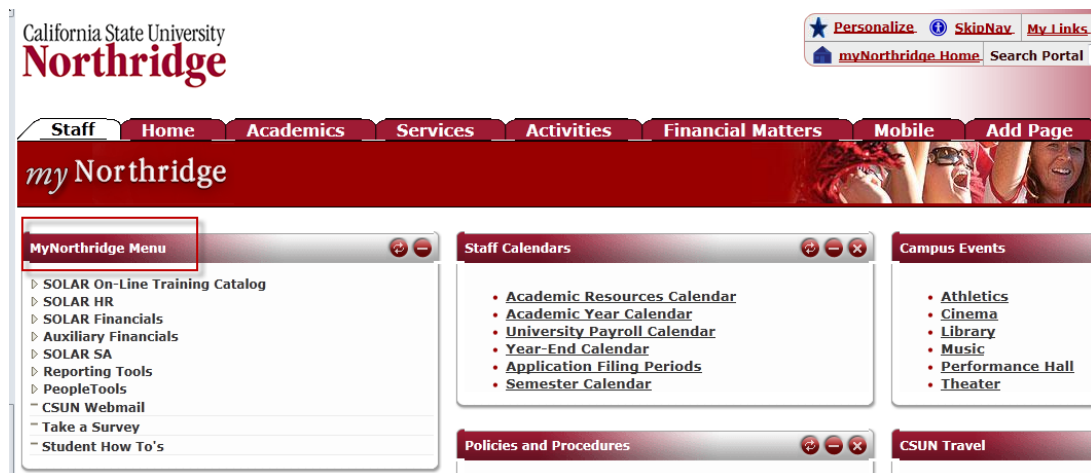
ACCESSING THE CAMPUS WEB PORTAL

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

1. From *Internet Explorer*, access the *myNorthridge portal login* located on [CSUN](#) home page.



2. Enter *CSUN User Name* or *CSUN ID#* in the *Username* field.
3. Enter *Password*.
4. Select the *Login* button.
5. Applications are located under the *MyNorthridge* menu section. The menu items listed are based on the employee's current security access.







APPROVE, CANCEL, OR REOPEN ONLINE REQUISITIONS

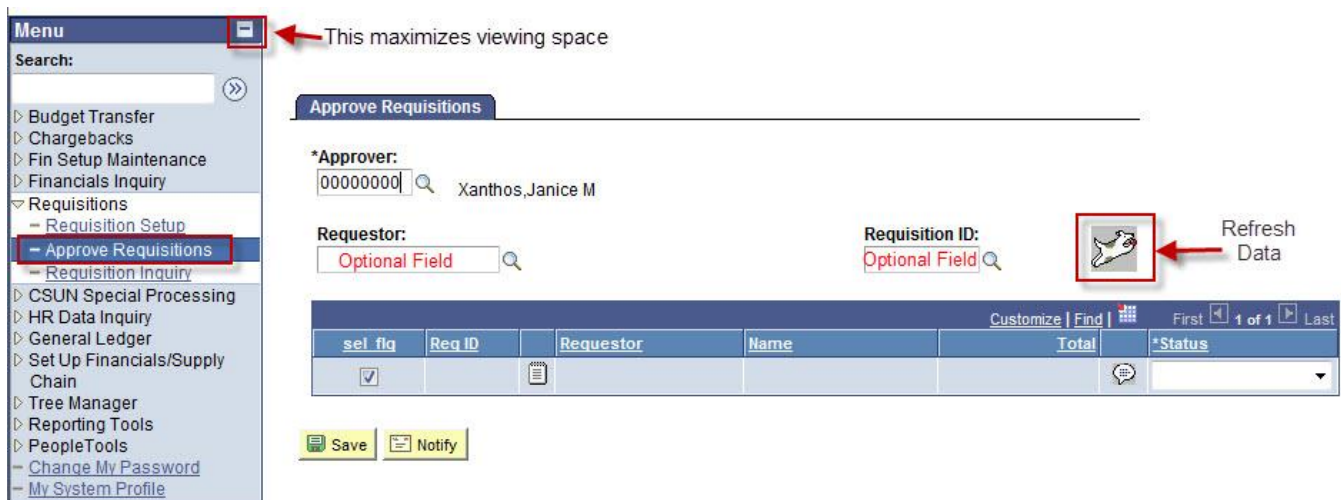
This section discusses the elements involved in approving an online requisition in the Online Requisition module.


1. To access the *Online Requisition (Approver)* module, select the following menu path:

Solar Financials > Requisitions > Approve Requisitions


2. To view requisitions pending approval *select* or *enter* one or more of the following:


- **Approver** – This field defaults to the Approver’s position number. To approve requisitions for a different approver, select the *magnifying glass* icon  and then select an *Approver*. Select the *refresh* icon  to view all requisitions pending approval for the selected Approver. This field is mandatory.
- **Requestor** – Select the *magnifying glass* icon  to select a *Requestor*. All requisitions in *Pending Approval* status from the selected Requestor will be displayed when the page is refreshed. This field is optional.
- **Requisition ID** – Enter the ten digit *Requisition ID number* to find a specific requisition. This field is optional. If a *Requisition ID number* is entered, it will override the value entered in the *Requestor* field.
- **Refresh Data** – Select the *Refresh Data* icon  to refresh the page and view the search results.





Menu  ← This maximizes viewing space

Approve Requisitions

*Approver: 00000000  Xanthos, Janice M

Requestor: Optional Field 

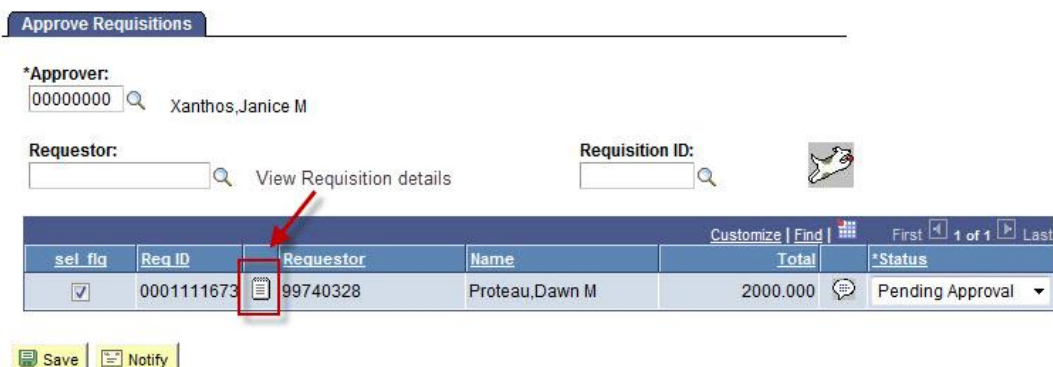
Requisition ID: Optional Field 

 ← Refresh Data


sel_flg	Req ID	Requestor	Name	Total	*Status
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Save Notify


3. To view the requisition details, select the *Requisition Inquiry* icon  as indicated below:




Approve Requisitions

*Approver: 00000000  Xanthos, Janice M

Requestor:  View Requisition details

Requisition ID: 

sel_flg	Req ID	Requestor	Name	Total	*Status	
<input checked="" type="checkbox"/>	0001111673		99740328	Proteau, Dawn M	2000.000	Pending Approval

Save Notify


Example of requisition details below:

[Req Inquire](#) | [Header Comments](#) | [Chartfield Summary](#)

Unit: NRCMP **Req ID:** 0001111673 **Req Date:** 02/13/2012 **Due Date:** 02/13/2012
Requestor: 99740328 Proteau,Dawn M
Approver: 99740471 Xanthos,Janice M **Status:** Pending

REQ LINE: Find | View All First 1 of 1 Last

Line:	Category:	Qty:	UOM:	Price:	Amount:
1	99999	20.0000	EA	100.00000	2000.000

More Info: Presentation Tables 

SCHEDULE:

Line:	Sched:	Distribute by:	Ship To:
1	1	Quantity	CSUN-RECV

DISTRIBUTION:

Line:	Sched:	Distrib:	Location:
1	1	1	UN-360


Qty: 20.0000 **Pct:** 100.0000
Account: 660003 **Fund:** 48501 **Dept:** 10035 **Program:** 9999 **Class:** **Project:**

[Requisition Print](#)


Press "Cancel" to return to previous page




[Req Inquire](#) | [Header Comments](#) | [Chartfield Summary](#)


- *Print* the requisition or select *cancel* to return to the previous page.


4. A generic email will be sent to the Requestor. Select the *Email Workflow* icon  to send an email with additional comments.

Approve Requisitions

***Approver:** 00000000  Xanthos,Janice M

Requestor:  View Requisition details **Requisition ID:**  

sel	flg	Req ID	Requestor	Name	Total	*Status
<input checked="" type="checkbox"/>		0001111673	99740328	Proteau,Dawn M	2000.000	Pending Approval 

Email Workflow Icon 

5. Add or change the email address, additional comments or deselect the *Send Email* check box to cancel an the email notification as indicated below:

Email Workflow

Email Notification Information (Optional)

Send Email Separate multiple addresses with commas or semi-colons. Use full email addresses (e.g. include "@csun.edu").

From: solarfin@csun.edu

To: solarfin@csun.edu Add or change email

CC:

Additional Text (Appended at End of Standard Message):

Type addiitonal information (Optional)

OK Cancel

Select *OK* or *Cancel* when complete. The email will be sent after the requisition status has changed and changes have been saved.

6. On the *Approve Requisitions* page, select one of the following options from the *Status* dropdown menu:

Approve Requisitions

*Approver: 99740471 Xanthos, Janice M

Requestor: Requisition ID:

sel	flg	Req ID	Requestor	Name	Total	*Status
<input checked="" type="checkbox"/>		0001111673	99740328	Proteau, Dawn M	2000.000	Pending Approval

Save Notify

Approved
Cancelled
Open
Pending Approval

- **Approved** – Approve the requisition. After the requisition is approved, it will be electronically downloaded by Purchasing and Contract Administration. Requisitions in *Approved* status can no longer be accessed or modified. The requisition details can be viewed using [Requisition Inquiry](#). To change an approved requisition, submit a [Request to Change Requisition or Purchase Order Form](#) to Purchasing and Contract Administration.
- **Cancelled** – Cancel the entire requisition. Once cancelled and saved, the cancellation is irreversible. Requisitions in a cancelled status cannot be accessed or modified. The requisitions can be viewed using [Requisition Inquiry](#). Once save, the Requestor will receive an email notification of the cancellation.

- **Open** –Return the requisition back to the Requestor for changes. Changing the status to *Open* will generate an email notification to the Requestor that the requisition has been re-opened.
- **Pending Approval** –Indicates the requisition has not been approved and may still be under review. The Requestor has the ability to retrieve, modify and re-route requisitions that are in a *Pending Approval* status.

7. The *sel flg* box must be checked and *Saved* for the action to take place.

Once saved, all requisitions in an **Approved**, **Open**, or **Cancelled** status will be listed in a view only mode. When the page is refreshed, the requisition will be removed from the *Approve Requisitions* page.

Approve Requisitions

*Approver:
 Xanthos,Janice M

Requestor: Requisition ID:

Customize Find First 1 of 1 Last						
sel flg	Req ID	Requestor	Name	Total	*Status	
<input checked="" type="checkbox"/>	0001111673	99740328	Proteau,Dawn M	2000.000	Approved	