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
- Creating Requisitions
- Requisition Inquiry
- Modify/Change or Cancel existing Requisitions

Employees requesting access must submit a SOLAR Financial Access Request form, selecting Enter Requisitions. Training certification is required for this role. It can be by a supervisor, by reviewing our online training through the Campus Portal, or by attending our Online Requisition training class.

**WHO DO I CONTACT FOR HELP?**

SOLAR Financials is available to answer SOLAR Financial questions at:

Email: solarfin@csun.edu

Call: (818) 677-6685

**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 an *Internet Browser*, access the *myNorthridge portal login* located on the CSUN home page.

2. Enter *CSUN User Name* or *CSUN ID#* in the *Username* field.

3. Enter the same *Password* used to log into the CSUN Network.

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.
CREATING ONLINE REQUISITIONS

This section discusses the elements involved in creating an online requisition.

1. To create a new Requisition, select the following menu path:
   
   Solar Financials> Requisitions > Requisitions

2. Select the Add a New Value tab., and then select the Search button.

   ![Create / Modify Requisitions](image)

3. Select the Add button.

   ![Create / Modify Requisitions](image)

   **Note:** The Business Unit and Requisition ID values will default to NRCMP and NEXT respectively. They cannot be changed.

4. All fields on the requisition noted with an (*) are required fields.
**HEADER SECTION:**
The Header Section contains information that applies to the entire requisition, including the individual line items.

5. Complete the information as indicated below:

- **Unit** – This field defaults to NRCMP (Northridge Campus). This field cannot be changed.

- **Req ID** – This field identifies the requisition number once assigned. This field defaults to NEXT until the requisition is saved. Once saved, a Req ID is automatically generated.

- **Req Date** – This field defaults to the current date and reflects when the requisition is created. No change is required.

- **Due Date** – This field defaults to blank. A date must be manually entered (mm/dd/yyyy) or select the Calendar icon to select a date when your goods and/or services are needed. Purchasing will be using this date to help prioritize requisitions.
  - **Open/Blanket orders** - Set the Due Date to the first day services should begin or product(s) is delivered. For instance, if a service contract for FY 2018-19 runs from July 1st through June 30th, the Due Date should be 07/01/18.

- **Requestor** – This field identifies the individual creating the requisition. This field cannot be changed.

- **Approver** – This field will usually be the default Approver. The Requestor can select a different Approver by selecting the magnifying glass icon and choose one from the drop down list.

- **Hold** – This checkbox will default checked. Do not uncheck this box until the requisition is completed and ready to be released to the Approver.

- **Status** – This field indicates the status of the requisition. No change is required.

![Image of requisition form with filled fields]

**LINE ITEMS - REQ LINE SECTION:**

6. Complete the information as indicated below:

- **Line** – This field defaults to Line 1, which represents the first line of the requisition. Additional lines can be added to the requisition by selecting the “+” icon.

- **Category** – This field defaults to 99999 and will be determined by Purchasing & Contract Administration. Do not change this value.

- **Qty (Quantity)** – This field indicates the quantity of items per line being ordered. Enter the appropriate quantity.
• **UOM (Unit of Measure)** – This indicates how the item is measured (EA - Each, BOX - Box, DOZ - Dozen, etc). Select the magnifying glass icon and choose from the drop down list.

• **Price** – Enter the estimated price of the item. Sales tax must not be included in the item price. Sales tax is calculated by Purchasing & Contract Administration when the requisition is converted to a purchase order.

• **Freight** - If the freight amount has been quoted by the vendor, the Requestor should add the freight as the last line item. If freight has not been quoted by the vendor, the buyer will add the freight amount as the last line of the purchase order using the General Supplies and Services account number.

• **Amount** – This field represents the extended price of the item being ordered and will populate automatically when the Qty, UOM and Price is entered.

• **More Info** – Enter a brief description of the items or service. To add additional information, select the Comments icon. The Comments field will allow up to 254 characters. After entering additional comments, select the OK button to return to the Form section.
  
  o **FY Open /Blanket orders** – Enter Open or Blanket on Line 1 in the More Info field.

**SCHEDULE SECTION:**

7. Complete the information as indicated below:

• **Distribute by** – This field is used to indicate items or services entered by Quantity or by dollar Amount. This field defaults to Quantity.

• **Ship To** – This field defaults for delivery to Central Receiving (CSUN-RECV). By clicking on the magnifying glass icon NO TAX will be listed on the look up page. This is for Accounts Payable use only. No change is required.

• **Qty (Quantity), Price and Amount** – These fields will automatically populate the quantity, price and amount for each line item completed in the Req Line section.

8. While working on multiple lines, the distribution section can be hidden, by selecting the down arrow icon.
DISTRIBUTION SECTION:

9. If you have multiple lines, skip to Req Defaults section.

10. Complete the information as indicated below:

- **Location** – The internal delivery location must be selected. Select the *magnifying glass* icon to view the look up table of building and room locations. If a Location was entered in Req Defaults tab section, select the Default Location button to populate the information.

- **Qty (Quantity)** – This field automatically populates the quantity entered in the Header section. No action required.

- **Percentage (Pct)** – This field defaults to 100.0000 (100%). Split distribution is not available at the line level. To split the cost of an item with another unit or department, add a new line with the appropriate line description and chartfields accordingly.

- **Account** – Enter the six digit Account code that supports the external and internal reporting description of the items being purchased or service provided. Select the *magnifying glass* icon to view the look up table for the appropriate account code, if unknown.

- **Fund** – Enter the five digit Fund code that identifies the funding source, such as general fund, etc. Select the *magnifying glass* icon to view the look up table for the appropriate Fund code, if unknown.

- **Dept ID** – Enter the five digit Department Identification number that identifies the requesting department. Select the *magnifying glass* icon to view the look up table for the appropriate Dept ID, if unknown.

- **Program** – Enter the Program code used to define the campus program, when applicable. Select the *magnifying glass* icon to view the look up table for the appropriate program code, if unknown. This is a mandatory field. If the program code does not apply, enter 9999.

- **Class** – This field is optional. Enter the Class code that identifies the purpose of the expenditure used for internal campus reporting. Select the *magnifying glass* icon to view the look up table for the appropriate Class code, if unknown.

- **Project** – This field is usually optional. Enter the Project code only when there is a project with a predetermined start and end date. Select the *magnifying glass* icon to view the look up table for the appropriate Project code, if unknown.
11. Once the requisition has at least one Line Item completed, it should be saved. At this time, the Req ID is assigned by the system, and the requisition can only be cancelled by the Approver. Make note of the Req ID for future use.

**REQ DEFAULTS TAB:**

12. This page is not required, but is helpful when there are several line items in a requisition.

13. Complete the Location, Account, Fund, DeptID, Program, Class and Project fields.

14. Return to the Forms tab.

15. Select the Default Location and/or Default Chartfields buttons. Information entered will populate the appropriate fields, instead of manually typing the information for each line item.

**ADDITIONAL LINE ITEMS:**

16. Select the (+) or (-) icon in the Req Line section of the Form tab to add or delete line items.

17. Select View All to see all line items if desired. Repeat steps 4 through 10 for each additional line item.
HEADER COMMENTS TAB:
This section is used to provide information to Purchasing & Contract Administration such as vendor name, address, contact name, telephone number, quote information, special handling information, estimated sales tax, discounts, credits and other additional information required by the buyer, approver, and vendor to create the purchase order.

18. Comments should be entered for each requisition.

- FY Open / Blanket orders – Make Sure the first line entered in the Header Comments section is Open or Blanket Order – FY 20xx to 20xx

19. Back-up documentation such as quotes, should be emailed to purch@csun.edu to prevent delay in processing the requisition. Be sure to cross-reference the quote with the assigned ReqID.

EMAIL WORKFLOW TAB:
The selected Approver’s email address will default in the Email Notification Information section. A pre-formatted notification is emailed to the Approver once the requisition is released and saved.

20. Additional email addresses and text can be added as needed.

21. Deselect the Send Email check box to cancel the email notification (Not recommended).
CHARTFIELD SUMMARY TAB:

The Chartfield Summary page provides a summary of chartfield information and amounts entered on the requisition. There will be a line for every unique chartfield string used.

22. Select the Refresh icon to initiate a summary. Refreshing this page will also save the requisition.

![Chartfield Summary page](image)

Chartfield Summary results:

![Chartfield Summary results](image)

23. When the all information has been entered and the requisition is ready to be sent to the Approver, return to the Form tab.
24. Release the requisition for approval by selecting the Hold checkbox.

25. A confirmation page will display. Select the Yes button to release the requisition for approval.

26. Select the Save button and the Requisition Status will change to Pending.

27. An email will be sent to the designated person entered on the Email Workflow tab. If nothing was entered, an email notification to approve the requisition will be sent to the default Approver.