MODIFY OR CHANGE
ONLINE REQUISITIONS

University Hall 365

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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*

- *Modify or Change a Requisition in Open Status*

- *Modify or Change a Requisition in Pending Status*

- *Requisitions in Approved of Complete Status*

- *Requisitions in Cancelled Status*

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.

REV: 9/21/15

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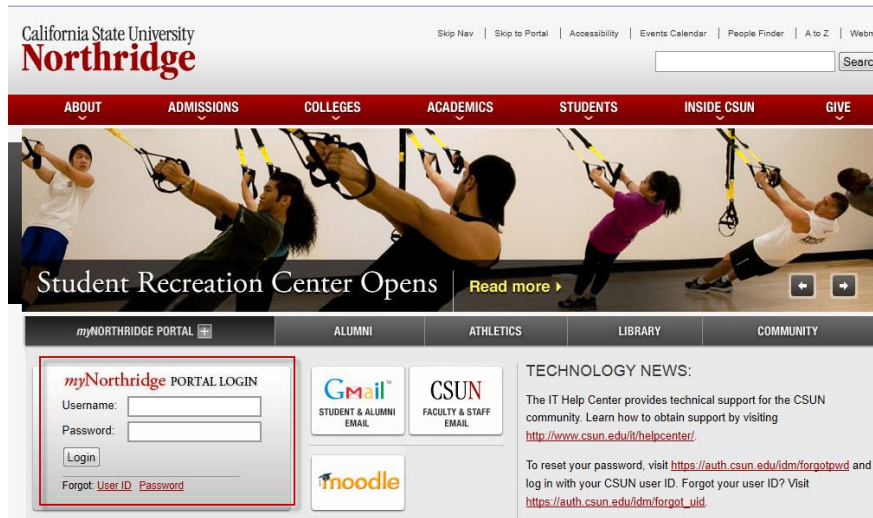
2. Enter *CSUN User Name* or *CSUN ID#* in the *Username* field.

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.
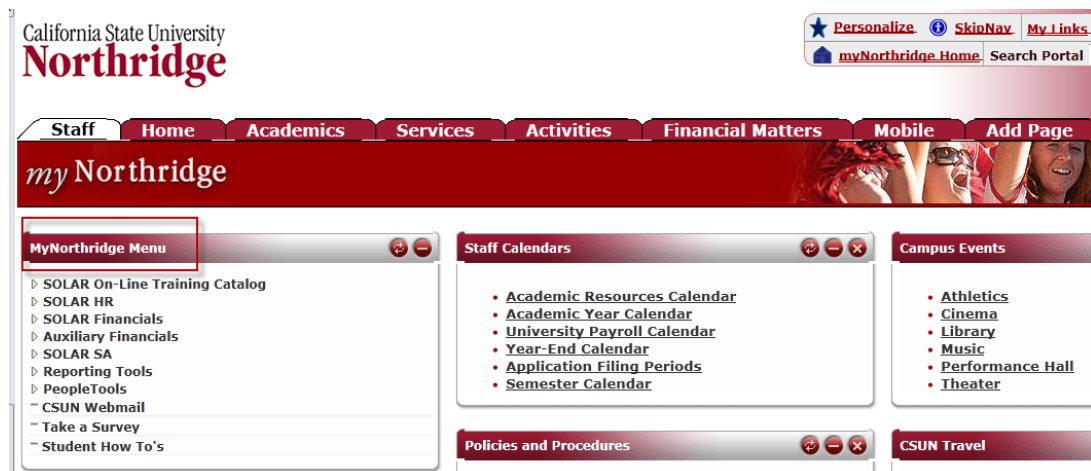
MODIFY OR CHANGE AN EXISTING REQUISITION IN OPEN STATUS

This section provides information and instructions to modify or change a *Requisition.*

1. To access an *Open* or *Pending* requisition, select the following menu path:

   Solar Financials> Requisitions > Requisitions

   - Select the *Find an Existing Value* tab. The search page will default to *Find an Existing Value*.

   - The *Business Unit* should default to *NRCMP* (Northridge Campus).

   - Enter the *Requisition ID* or leave this field blank.

   - *Requestor Position Nbr* will default to the user's position number assigned in the HR system; otherwise enter the 8 digit position number of the user that created the requisition. If unknown, select the *magnifying glass* icon or empty the field to search on all eligible requisitions.

   - Select *Search*.

2. If only **one** requisition exists, skip to #4. It will directly open after selecting the *Search* button. If there are multiple requisitions, select the correct *document* from the search results.

3. Depending on the *Status*, a *pop up window* may display. Select *OK* to reopen the requisition.

   Note: The following situations will initiate a pop up confirmation window prior to opening the requisition:
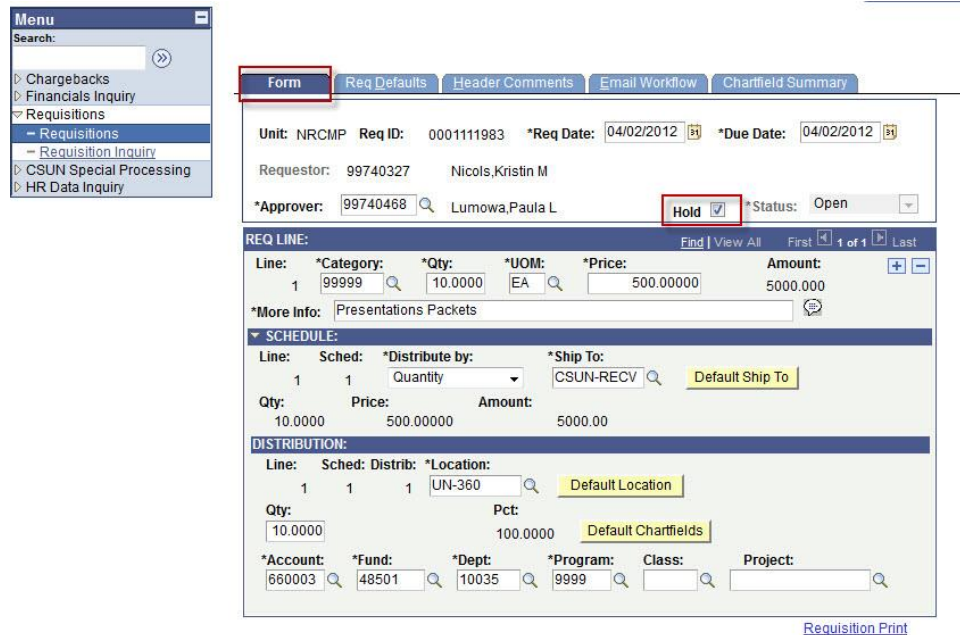
   - When the status is *Pending Approval*.

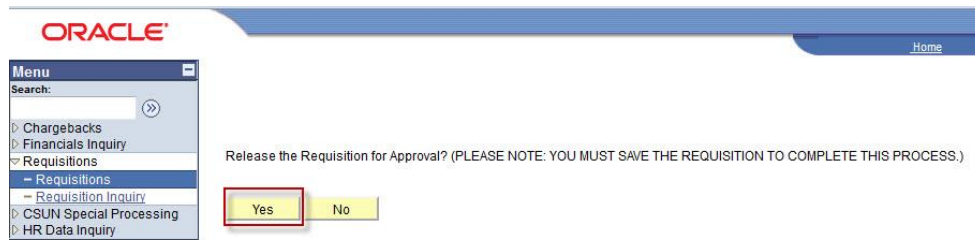   - Opening a requisition that was last updated or created by another Requestor.

4. Make the necessary changes and return to the *Form* tab.

5. Select the *Save* button after changes are completed.

6. Uncheck the *Hold* check box on the *Form* page.

7. Select *Yes* to release the requisition for approval.

8. Select the *Save* button again and the requisition status will change to *Pending*.

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

MODIFY OR CHANGE AN EXISTING REQUISITION IN PENDING STATUS

- If the requisition is in *Pending* status, this means that the requisition has been sent to the selected *Approver,* pending approval.

- If changes are necessary, either the Requestor or Approver may reopen the requisition. Guidance for the Approver can be found in the *Approve Requisitions User's Guide*.

- If the Approver sends the requisition back to the Requestor, follow *steps 1 – 8* to make changes.

REQUISITIONS IN APPROVED or COMPLETE STATUS

- If the requisition is in *Approved* or *Complete* status, this means that selected Approver has approved the requisition and it cannot be modified online. A *Request to Change Requisition or Purchase Order* form must be submitted to Purchasing & Contract Administration for any changes.

REQUISITIONS IN CANCELLED STATUS

- *Cancelled* requisitions cannot be modified.

- The Approver can cancel existing requisitions in *Pending* status only. If the requisition is in *Open* status, follow *steps 1 – 8* to change the status to *Pending*, which will forward the requisition to the Approver to cancel.