This is for the person(s) that will be approving SURs.
Access PeopleSoft Financials via http://www.ouhsc.edu/jumpoff/

Core PeopleSoft Applications

- Campus Solutions (formerly Student Administration) - https://cs.ouhsc.edu
- Financial Services - http://fs.ouhsc.edu
- Human Capital (formerly Human Resources) - http://hc.ouhsc.edu

OUHSC MAIN MENU >> Service Unit Requests >> SUR Entry

The SUR Status will be defaulted to Pending Approval.

Click Search.
You will review the information on the SUR ENTRY screen.

If all looks okay, click on Approve. An email will be sent to the SUR Enterer, the SUR Contact Person, and the Service Unit.

The approver is then done with the SUR at this time; although, they can always go back in and review these items later.

Once completed by the Service Unit, nothing can be changed.
To deny this SUR, the approver must add notes into the *Deny Reason*. Once denied, the SUR Enterer and SUR Contact person get an email that this SUR has been denied. The Status then changes to *Denied*.

The Approver can also:
- Add Approver Comments
- Add Attachments
- Change the Chartfield Information, if necessary
SUR APPROVER FOR PREVIOUSLY DENIED SUR

This documentation is to show what the SUR Approver is to do with a previously denied SUR.
OUHSC MAIN MENU >> Service Unit Requests >> SUR Entry

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OUHSC MAIN MENU >> Service Unit Requests >> SUR Entry

SUR Entry

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

Find an Existing Value

Limit the number of results to (up to 300): 300
Service Number: begins with
Service Unit: =
SUR Status: = Pending Approval

Search  Clear  Basic Search  Save Search Criteria
The Approver will review the Deny Reason.

The Approver can check the Request Description section for more information from the SUR Enterer.

In the example, it says to see attachment. The Approver can then go to the Attachments tab and review the attachment.
When the Approver is ready to approve the SUR, they will return to the SUR Entry tab, remove the Deny Reason, and click Approve.

An email will then be sent to the SUR Enterer, the SUR Contact Person, and the Service Unit.
Number: 1000586  Status: Approved  Requested On: 01/30/2012
Requested By: SURENTRY  Service Unit: OneCard
Required By: 02/03/2012  Department: ADM003  Staff Senate/Faculty Senate

Location of Delivery/Work
Building: Service Center Building  Room: 224

Contact Person Information
First Name: Melissa  Last Name: Borchardt
Phone Number: 555-5555  Extension: 46378
Building: Service Center Building  Room: 224T
Email: mborchar@ouhsc.edu

Request Description
This is a test for One Card for training purposes.

Chartfield Information

<table>
<thead>
<tr>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Percentage</th>
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Approver Comments

Approved By: SURAPPROVER  Approved On: 01/30/2012

From: Service Unit Requests
To: SURENTRY@ouhsc.edu
Cc: Borchardt, Melissa (HSC)
Subject: SUR 1000586 - Approved

SUR 1000586 has been approved and assigned to OneCard.

Department: ADM003
Description: This is a test for One Card for training purposes.
Approver Comments:
SUR REPORTS

These reports can be used by the SUR Inquirer, SUR Preparer, SUR Approver, and the Service Units.
Access PeopleSoft Financials via http://www.ouhsc.edu/jumpoff/

**Core PeopleSoft Applications**

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- Financial Services - http://fs.ouhsc.edu
- Human Capital (formerly Human Resources) - http://hc.ouhsc.edu

**OUHSC MAIN MENU >> Service Unit Requests >> SUR Report**

You will need to add a new **Run Control ID:** to run this report
The SUR Reports can be ran by:
SUR Number Range
OR
SUR Requested On Date Range

No matter how you run the report, you will only be able to see the organizations that you have access to.
The SUR Reports can also be ran by the SUR Service Unit and/or SUR Status and/or by Department along with the SUR Number Range OR SUR Requested On Date Range

No matter how you run the report, you will only be able to see the organizations that you have access to.
SUR SERVICE UNIT REPORT OPTIONS

If logged in as a Service Unit, you can run the report by SUR Status:

- SUR Number Range
  - From SUR #:
  - To SUR #:

- SUR Requested On Date Range
  - From Date:
  - Through Date:

- SUR Service Unit - Optional
  - Service Unit: OneCard
  - SUR Status:

Available statuses include:
- Approved
- Cancelled
- Complete
- Denied
- EI Approval
- Holding
- In Process
- In Progress
- Open
- Parking Issued
- Pending
- Pending Approval
- Processed
- Received
- Shuttle Provided
- Submitted
SUR REPORT EXAMPLE

Service Unit Request

General Information
Number: 1000014  Status: In Progress  Requested On: 21-SEP-2011
Requested By: MBORCHAR  Service Unit: OneCard
Required By: 30-SEP-2011  Department: PRV453

Location of Delivery/Work
Building: Service Center Building  Room: 215

Contact Person Information
First Name: MELISSA  Last Name: BORCHARDT
Phone Number: 271-2345  Extension: 46378
Building: Service Center Building  Room: 224T
Email: MELISSA-BORCHARDT@OUHSC.EDU

Request Description
Estimate: N  Attachments: Y
Description: NEED TWO ONECARDS. Please review attachment for requested information.

Department Chartfield Information

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Department Approver Information
Approved By: SURAPPROVER  Approved On: 21-SEP-2011

Service Unit Comments
One of the two OneCards have been completed.

Service Unit Chartfield Information

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