This documentation is for the Service Unit Preparer.
To add a new SUR, click on Add a New Value.

To search for an existing SUR, use the search by Service Number, Service Unit, or SUR Status.
Add a New Value >> Choose from which Service Unit you are requesting work to be done.
Fill out the *SUR Entry* tab just as you have done in the past using the paper entry form.

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![SUR Entry Form]

**General Information**
- **Number:** NEW
- **Status:**
- **Requested On:** 09/21/2011
- **Requested By:** MBORCHAR
- **Service Unit:** OneCard
- **Required By:** 09/30/2011
- **Department:** PRV453
- **ERP Services**

**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.ED

**Request Description**
- **Check for Estimate**
- **NEED TWO ONECARDS.**

**Chartfield Information**

<table>
<thead>
<tr>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>STATE</td>
<td>FRV450</td>
<td>00016</td>
<td>00000</td>
<td>50.00</td>
</tr>
<tr>
<td>2</td>
<td>STATE</td>
<td>FRV453</td>
<td>00016</td>
<td>00000</td>
<td>50.00</td>
</tr>
</tbody>
</table>
Required By: This is the date that you need the service done by. If needed ASAP, be sure to put today’s date.

Department: This is the department that is requesting the work to be done.

Building and Room: This is the location of delivery or where the work is to be done.

Contact Person Information: This is if you want another person to be notified of the SUR and/or the person that needs to be contacted by the Service Unit for questions.

Request Description: This is where you put what type of service or work you need the Service Unit to do.

Check for Estimate: If this item is checked, the service unit will know that an estimate needs to be given before any work or delivery is done.

Chartfield Information: This information is used by the Service Unit for billing information. This information is REQUIRED.

Attachments Tab: Attachments can be added via the Attachments Tab.

Once this item is saved, the approver(s) of the Department get an email letting them know that an item is ready to be approved. The contact person also gets an email stating that the SUR is pending approval.

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From: Service Unit Requests
To: Borchardt, Melissa (HSC)
Cc: 
Subject: SUR - Pending Approval

The following SUR has been submitted for approval.

SUR number: 1000586
Service Unit: OneCard
Department: ADM003
Description: This is a test for One Card for training purposes.
SUR DENIED

This is for the SUR Preparer when an Approver has denied a SUR.
You can use the SUR Status filter to find SURs that have been Denied.

<table>
<thead>
<tr>
<th>SUR Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter any information you have and click Search. Leave fields blank for a list of all values.</td>
</tr>
<tr>
<td>Limit the number of results to (up to 300): 300</td>
</tr>
<tr>
<td>Service Number: begins with</td>
</tr>
<tr>
<td>Service Unit:</td>
</tr>
<tr>
<td>SUR Status:</td>
</tr>
</tbody>
</table>

- Approved
- Cancelled
- Complete
- Denied
- El Approval
- Holding
- In Process
- In Progress
- Open
- Pending
- Pending Approval
- Processed
- Received
- Shuttle Provided
- Submitted
You can review the Deny Reason and update the Request Description.

If you would like to add an attachment, go the Attachments tab and add your backup information or documentation. Once this is done, the SUR goes to *Pending Approval* status and the approver(s) get an email along with the Contact Person.
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**
- 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 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:
February 12
Service Unit Reports

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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<th>Class</th>
<th>Project</th>
<th>Percentage</th>
</tr>
</thead>
</table>
| STATE | PRV450 | 00016 | 00000 | 50
| STATE | PRV453 | 00016 | 00000 | 50

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

<table>
<thead>
<tr>
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<th>Class</th>
<th>Project</th>
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<tbody>
<tr>
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<td>00000</td>
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<td>10.00</td>
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</tr>
<tr>
<td>STATE</td>
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<td>00000</td>
<td>600100</td>
<td>10.00</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>
