

SUR APPROVER

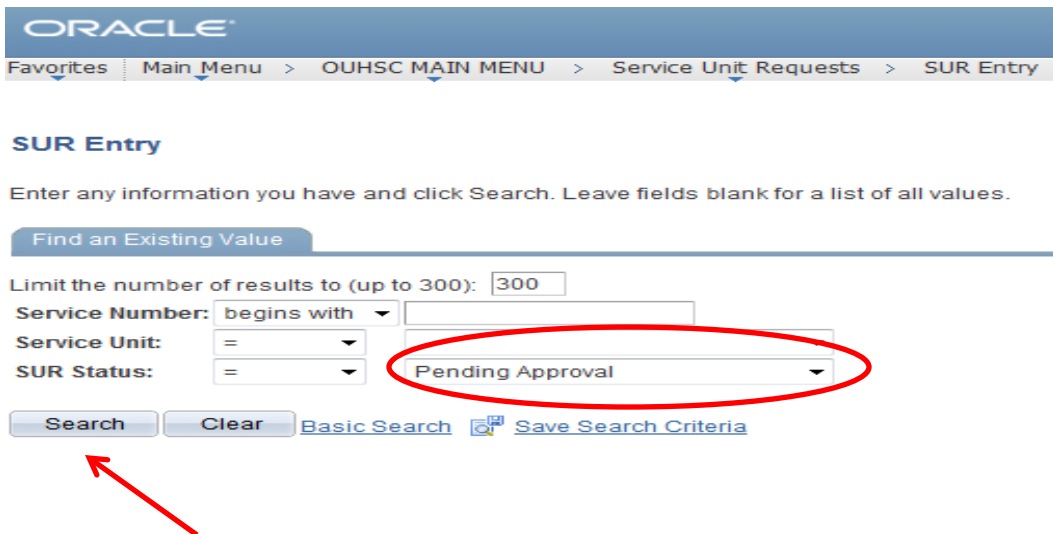
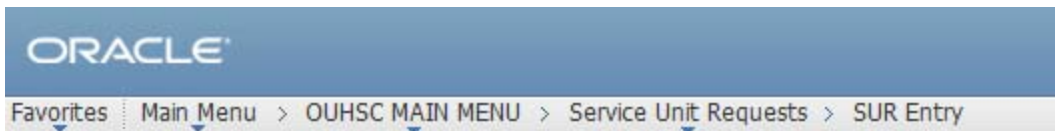
This is for the person(s)
that will be approving
SURs.

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



ORACLE

Favorites | Main Menu > 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):

Service Number:

Service Unit:

SUR Status: Pending Approval

[Basic Search](#)

The SUR Status will be defaulted to Pending Approval.

Click Search.

SUR Entry Service Unit Attachments

General Information

Number: 1000586 Status: Pending Approval 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

Check for Estimate

This is a test for One Card for training purposes.

Chartfield Information

Fund	Dept	Program	Class	Project	Percentage
1 STATE	ADM003	00016	00000		100.00

Approver Comments

Deny Reason: _____

Deny **Approve**

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.

General Information

Number: 1000586 **Status:** ~~Pen~~ Denied ~~aval~~ **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

Check for Estimate

This is a test for One Card for training purposes.

Chartfield Information

Customize Find [?] [Grid] First 1 of 1 Last						
Fund	Dept	Program	Class	Project	Percentage	
1 STATE	ADM003	00016	00000		100.00	+ -

Approver Comments

Deny

Approve

Deny Reason:

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.

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 Entry

ORACLE

Favorites Main Menu > 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):



Service Number: begins with

Service Unit: =

SUR Status: =

[Basic Search](#)  [Save Search Criteria](#)

General Information

Number: 1000014 **Status:** Pending Approval **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. Please review attachment for requested information.



Chartfield Information

	Fund	Dept	Program	Class	Project	Percentage		
1	STATE	PRV450	00016	00000		50.00	+	-

Deny Reason: Please give more information on exactly what is being requested. Attach any necessary documentation.

The Approver will review the Deny Reason.

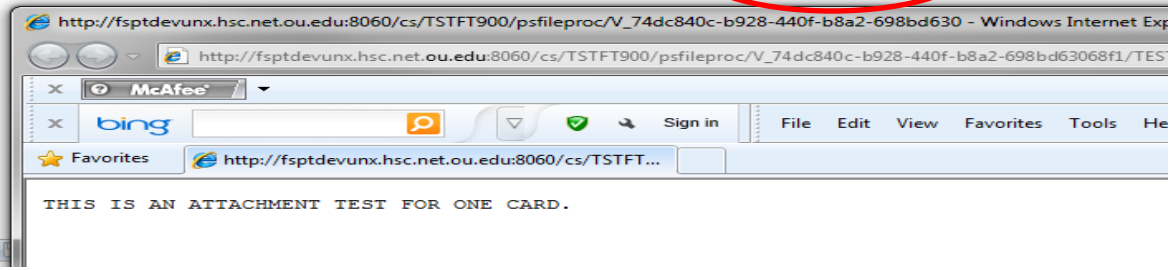
The Approver can check the Request Description section for more information from the SUR Enterer.

In the example, it says to see attachment. The Approver can then go to the Attachments tab and review the attachment.

Number: 1000014

Status: Pending Approval

Attached File	Add	View	Delete
1 TEST_ONECARD.txt	Add	View	Delete



SUR Entry | Service Unit | Attachments

General Information

Number: 1000040 Status: Pending Approval Requested On: 10/11/2011
 Requested By: MBORCHAR Service Unit: OneCard
 Required By: 10/15/2011 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.EDU

Request Description

Check for Estimate

NEED TWO ONECARDS.

Chartfield Information

Fund	Dept	Program	Class	Project	Percentage
1 STATE	PRV450	00016	00000		50.00
2 STATE	PRV453	00016	00000		50.00

Approver Comments

Deny Approve

Deny Reason: Please give more information on exactly what is being requested. Attach any necessary documentation.

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.

General Information

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

Check for Estimate

This is a test for One Card for training purposes.

Chartfield Information

Customize Find  First 1 of 1 Last						
Fund	Dept	Program	Class	Project	Percentage	
1 STATE	ADM003	00016	00000		100.00	

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

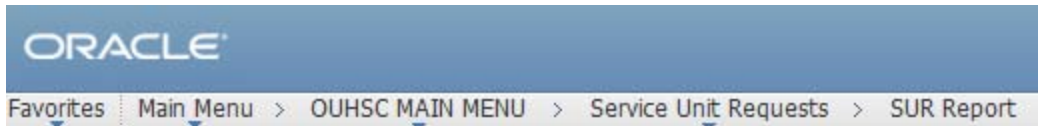
These reports can be used by the SUR Inquirer, SUR Preparer, SUR Approver, and the Service Units.

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- **Financial Services - <http://fs.ouhsc.edu>** ←
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OUHSC MAIN MENU >> Service Unit Requests >> SUR Report



ORACLE

Favorites Main Menu > OUHSC MAIN MENU > Service Unit Requests > SUR Report

SUR Report

Find an Existing Value Add a New Value

Run Control ID:

Add

You will need to add a new **Run Control ID:** to run this report

SUR Report

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

Find an Existing Value Add a New Value

Limit the number of results to (up to 300):

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

SUR SERVICE UNIT REPORT OPTIONS

SUR Report

Run Control ID: SUR

[Report Manager](#) [Process Monitor](#)

Run

SUR Number Range	
From SUR #:	<input type="text"/>
To SUR #:	<input type="text"/>

OR

SUR Requested On Date Range	
From Date:	<input type="text"/>
Through Date:	<input type="text"/>

Optional Parameters

Service Unit:	<input type="text"/>
SUR Status:	<input type="text"/>
Department:	<input type="text"/>

Save Notify

Add Update/Display

**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.


SUR SERVICE UNIT REPORT OPTIONS

SUR Report

Run Control ID: SUR [Report Manager](#) [Process Monitor](#) **Run**


SUR Number Range


From SUR #: 

To SUR #: 

OR

SUR Requested On Date Range


From Date: 





Through Date: 

Optional Parameters

Service Unit:

SUR Status:

Department: 

 Save  Notify  Add  Update/Display

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:

Run Control ID: SURREPORT [Report Manager](#) [Process Monitor](#)

SUR Number Range

From SUR #:

To SUR #:

OR

SUR Requested On Date Range

From Date:

Through Date:

SUR Service Unit - Optional

Service Unit: OneCard

SUR Status:

- 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

Fund	Dept	Program	Class	Project	Percentage
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

Fund	Dept	Program	Class	Project	Account	Amount	Billed
STATE	PRV453	00016	00000		600100	10.00	N
STATE	PRV450	00016	00000		600100	10.00	Y