

SUR ENTRY

This documentation is for
the Service Unit Preparer.

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 screenshot shows the Oracle PeopleSoft interface for the SUR Entry page. At the top, the Oracle logo is displayed. Below it is a breadcrumb trail: Favorites | Main Menu > OUHSC MAIN MENU > Service Unit Requests > SUR Entry. The main heading is "SUR Entry". Below the heading is a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two buttons: "Find an Existing Value" and "Add a New Value". The "Add a New Value" button is circled in red. Below the buttons is a search criteria section with a limit of 300 results. The criteria include: Service Number (dropdown: begins with, text input), Service Unit (dropdown: =, dropdown), and SUR Status (dropdown: =, dropdown). At the bottom of the search section are buttons for Search, Clear, Basic Search, and Save Search Criteria. At the very bottom of the page, there are links for "Find an Existing Value" and "Add a New Value".

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.

The screenshot shows the Oracle SUR Entry interface. At the top, the Oracle logo is visible. Below it is a breadcrumb trail: Favorites > Main Menu > OUHSC MAIN MENU > Service Unit Requests > SUR Entry. The main heading is "SUR Entry". Below this, there are two buttons: "Find an Existing Value" and "Add a New Value". The "Add a New Value" button is circled in red. Below the buttons, there is a "Service Unit:" label and a dropdown menu. The dropdown menu is open, showing a list of service units. To the left of the dropdown menu, there is an "Add" button and a "Find an Existing Value" link. The list of service units includes: Advertising Expense Clearing, Alcohol Vault, Background Check, Campus Police, Flow Cytometry and Imaging, General Services, Ground Maint/Landscaping, IT Computer Sales, Lab Animal Resources, Molecular Biology & Cytometry, Motor Pool, Moving Services, OneCard, Parking, Photographic Services, Radiation Safety, Records Management, Rodent Barrier Facility, Site Support, Student Union, Telecommunications, Television Services, Transportation, and Willd Body Program.

Fill out the *SUR Entry* tab just as you have done in the past using the paper entry form.

[Favorites](#) | [Main Menu](#) > [OUHSC MAIN MENU](#) > [Service Unit Requests](#) > [SUR Entry](#)

[SUR Entry](#) | [Service Unit](#) | [Attachments](#)

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

Customize | Find | View 1 | | First 1-2 of 2 Last

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

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.

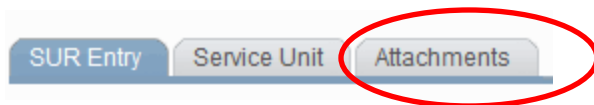
Contact Person Information: This is if you want another person to be notified of the SUR and/or the person that needs to be contacted by the Service Unit for questions.

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

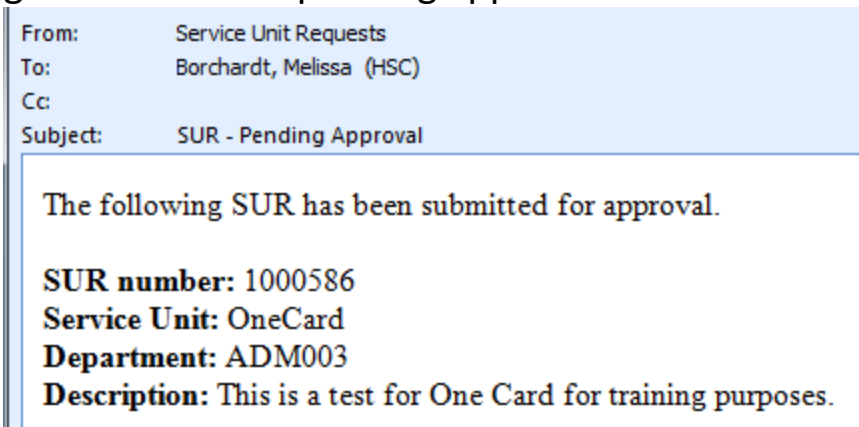
Check for Estimate: If this item is checked, the service unit will know that an estimate needs to be given before any work or delivery is done.

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.



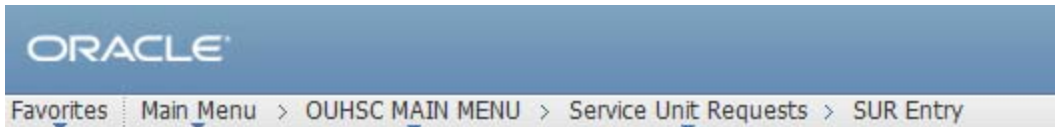
SUR DENIED

This is for the SUR Preparer
when an Approver has
denied a SUR.

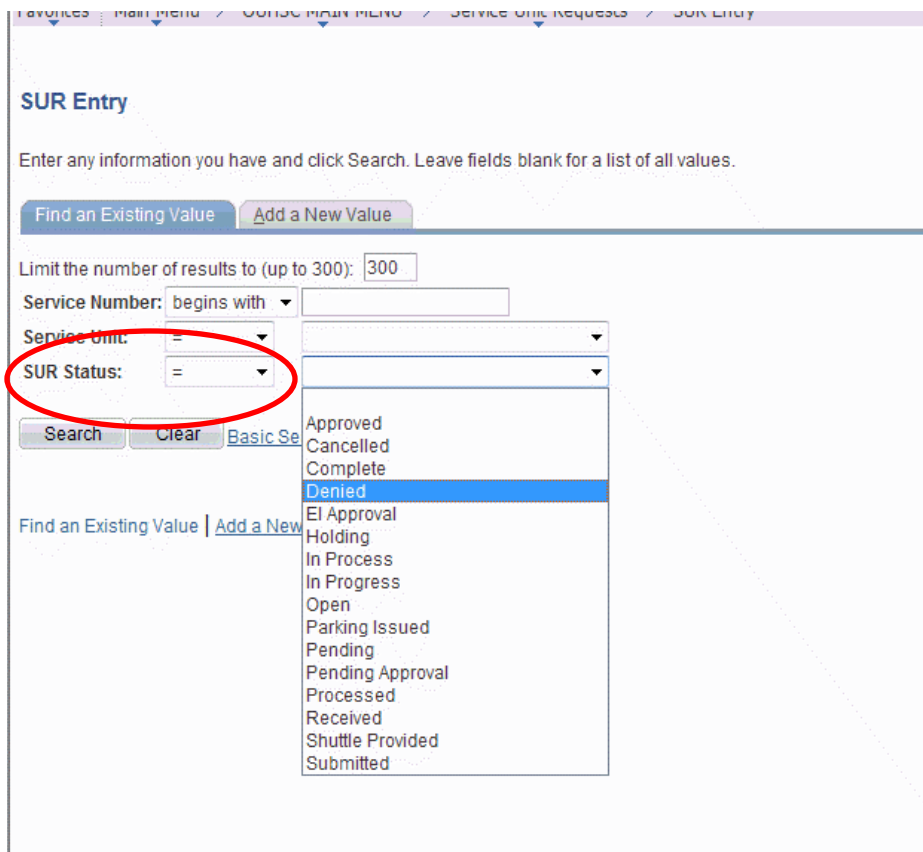
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You can use the SUR Status filter to find SURs that have been Denied.



SUR Entry

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):

Service Number: begins with

Service Unit: =

SUR Status: =

Search | Clear | Basic Search

Find an Existing Value | Add a New Value

- Approved
- Cancelled
- Complete
- Denied**
- EI Approval
- Holding
- In Process
- In Progress
- Open
- Parking Issued
- 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.

SUR Entry | Service Unit | Attachments

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.

SUR Entry | Service Unit | Attachments

Number: 1000014 Status: Pending Approval

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

Save Return to Search
SUR Entry | Service Unit | Attachments

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 REPORTS

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

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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](#)

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

Optional Parameters

Service Unit:

SUR Status:

Department:

**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 **OR** **SUR Requested On Date Range**

From SUR #:
To SUR #:

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