

















Step	Action
1	After logging into PeopleSoft Financials, you will access Service Unit Request(SUR) Approvals via the Home screen under Approvals and then click on SUR Approval .

▼ OU Homepage

<p>Service Unit Request</p> 	<p>Accounts Payable</p> 	<p>Approvals</p> 
<p>Cost Transfer</p> 	<p>eProcurement</p> 	<p>Reports and Query viewer</p> 
<p>Cash Receipts</p> 	<p>P-Card</p> 	<p>SoonerTrack Homepage</p> 

<p> Voucher Approval</p>	<h3>SUR Entry</h3> <p>Enter any information you have and click Search. Leave fields blank for a list of all values</p> <p>Find an Existing Value</p> <p>▼ Search Criteria</p> <p>Business Unit <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="Search"/></p> <p>Service Number <input type="text" value="begins with"/> <input type="text"/></p> <p>Service Unit = <input type="text"/> <input type="text"/></p> <p>Org <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="Search"/></p> <p>Entity <input type="text" value="begins with"/> <input type="text"/></p> <p>Project <input type="text" value="begins with"/> <input type="text"/></p> <p>SUR Status = <input type="text"/> <input type="text" value="Pending Approval"/></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Save Search Criteria"/></p>
<p> Cost Transfer Approval</p>	
<p> Requisition Approval</p>	
<p> OnDemand Approval</p>	
<p> P-Card Approval</p>	
<p> SUR Approval</p>	
<p> Worklist</p>	

2 Users can search for a pending SUR by using the **Find an Existing Value** tab and marking the **SUR Status** as "Pending Approval".

SUR Entry

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

Find an Existing Value

▼ Search Criteria

Business Unit begins with 🔍

Service Number begins with

Service Unit = ▼

Org begins with 🔍

Entity begins with

Project begins with

SUR Status = ▼ Pending Approval

Search
Clear
Basic Search
Save Search Criteria

Search Results

View All First 1-2

Business Unit	Service Number	Service Unit	Requested Date	Org	Entity	Project	SUR Status
NORMN	1010557	Background	04/10/2023	CAS01001	00000 (blank)		Pend App
NORMN	1010558	Background	04/10/2023	CAS01001	00000 (blank)		Pend App

3 Once you click on an SUR that is pending approval, you can review the attachments, Chart Field Spread, and request description to verify if you wish to approve it. Once you want to approve it, type whatever comments you want in the **Approver Comments box** and hit **Approve**. If you need to **Deny** the SUR, then you can hit deny instead. Deny reason is required and a new SUR would need to be entered if it is denied. Whatever is typed in this Approver Comments box is sent to the enterer and all emails listed in the "Email" section.

SUR Entry | Service Unit | **Attachments**

General Information

Business Unit: NORMN

Number: 1010557 **Status:** Pending Approval **Requested On:** 04/10/2023

Requested By: ██████████ **Service Unit:** Background Check - Norman

Required By: 04/10/2023 **Org:** CAS01001 ARTS & SCIENCES DEAN

Location of Delivery/Work

Building: College of Arts and Sciences **Room:** 1234

Contact Person Information

First Name: Shawn **Last Name:** Massey

Phone Number: 405-271-2345 **Extension:** 3

Building: College of Arts and Sciences **Room:** 4321





Email:









Request Description

Check for Estimate

Testing

Chartfield Information

Personalize | Find |  |  First  1 of 1 

Fund	Org	Function	Entity	Source	Purpose	Project	Percentage
1 MISCA 	CAS01001 	00000 	00000 				100.00 

Approver Comments

Department Approval

▼ **BUSINESS_UNIT=NORMN, OU_SERVICE_NUMBER=1010557, OU_SERVICE_UNIT=OSBN:Pending**

Department Approval

Pending

Multiple Approvers
SUR Department Approvers

 Save  Return to Search  Previous in List  Next in List

SUR Entry | Service Unit | **Attachments**

4

The **Status** section shows the current status whether it is pending approval or approved.

The **Required By** section is the requested date of action for the Service Unit.

The **Org** section will only let you enter SUR's for Orgs for which you have security access.

The **Building** and **Room** under **Location of Delivery/Work** is the location where delivery or work is requested. Can be different than contact information since the SUR entry typically comes from a centralized group or certain individuals.

The **Contact Person Information** is where you input the information (First, Last, Phone, location) the Service Unit can use to contact for Departmental correspondence. Under the contact information is the **Email** section is where you can put one or multiple emails separated by a semicolon "email1@ou.edu;email2@ou.edu". Emails entered here will get the status change notifications from the Service Unit.

The **Request Description** section Typically will have a box that says "Check for Estimate" if the request needs to get an estimate first. It can also have Service Unit specific options based on the Service Unit (ex. Parking wants to know if you will pick up the pass or if they will send it through campus mail). It will also have a text box to briefly describe the request. If request is not specific enough, Service Unit will have to reach out for clarification and might cause a delay in the request.

The **Chartfield Information** is where you will input the appropriate CFS for the work. If needed, you can cost share across CFS and charge a percentage of the request. The Percentage must be entered and if multiple CFS are entered, the percentage total must equal 100. Until the SUR is approved, you can update the CFS if you review it and entered it incorrectly.