

Step	Action
1	After logging into PeopleSoft Financials, you will access Service Unit Request (SUR) via the Home screen under <b>Service Unit Request</b> and it will default to <b>SUR Entry</b> . You can also get to the screen via <b>Nav Bar &gt; Navigator &gt; OU Main Menu &gt; Service Unit Requests &gt; SUR Entry</b>



2	Users can search for an existing SUR by using the <b>Find an Existing Value</b> tab. If you are not finding the SUR you want, make sure to check the SUR Status and other search criteria so you are not excluding it from the search results.
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## SUR Entry

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

**Find an Existing Value**

Add a New Value

### Search Criteria

Business Unit begins with  

Service Number begins with

Service Unit =

Org begins with  

Entity begins with

Project begins with

SUR Status =

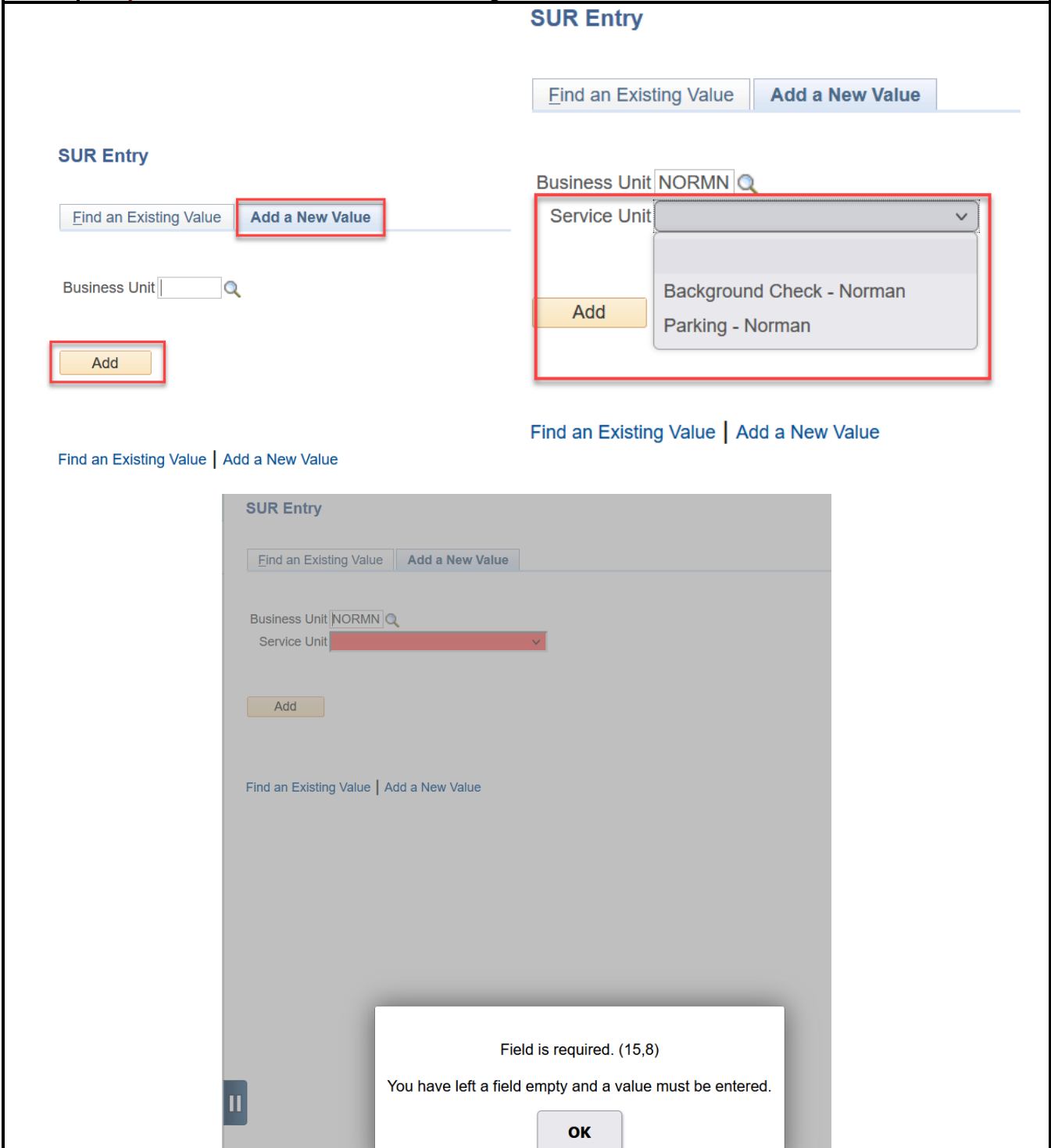
Search

Clear

Basic Search 

Save Search Criteria

- 3 Users can add a new SUR by using the **Add a New Value** tab. The Business Unit will not default to a value. Enter your Business Unit and then click the magnifying glass next. After that, select the appropriate Service Unit. Click **Add**. **Add** will take you to the **Service Unit Request** screen where the user can begin their selections.



The screenshot displays the 'SUR Entry' interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs, there are two sets of search fields. The first set includes a 'Business Unit' search box with a magnifying glass icon and an 'Add' button. The second set includes a 'Business Unit' search box with the value 'NORMN' and a magnifying glass icon, and a 'Service Unit' dropdown menu. The dropdown menu is open, showing two options: 'Background Check - Norman' and 'Parking - Norman'. An 'Add' button is positioned to the left of the dropdown. Below the search fields, there are two sets of navigation links: 'Find an Existing Value | Add a New Value' and 'Find an Existing Value | Add a New Value'. At the bottom of the screenshot, an error message box is displayed with the text: 'Field is required. (15,8) You have left a field empty and a value must be entered.' and an 'OK' button.

**PLEASE NOTE: The Service Unit must be selected before hitting Add. If you try to hit the Add button after typing the Business Unit and before clicking on the magnifying glass and selecting the Business Unit, it will display an error message.**

SUR Entry | Service Unit | Attachments

### General Information

Business Unit: NORMN

Number: 1010561      Status: Pending Approval      Requested On: 04/17/2023

Requested By: 450150 Michael L Keeter      Service Unit: Background Check - Norman

Required By: 04/18/2023    \*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: 18173190450    Extension: 123456

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

Email: Shawn-Massey@ouhsc.edu

### Request Description

Check for Estimate

Requester Description Text. "I need \_\_\_\_\_"

### Chartfield Information

Fund	Org	Function	Entity	Source	Purpose	Project	Percentage	
1	EDGEN	CAS01001	00000	00000			50.00	+ -
2	EGFEE	CAS01002	00000	00000			50.00	+ -

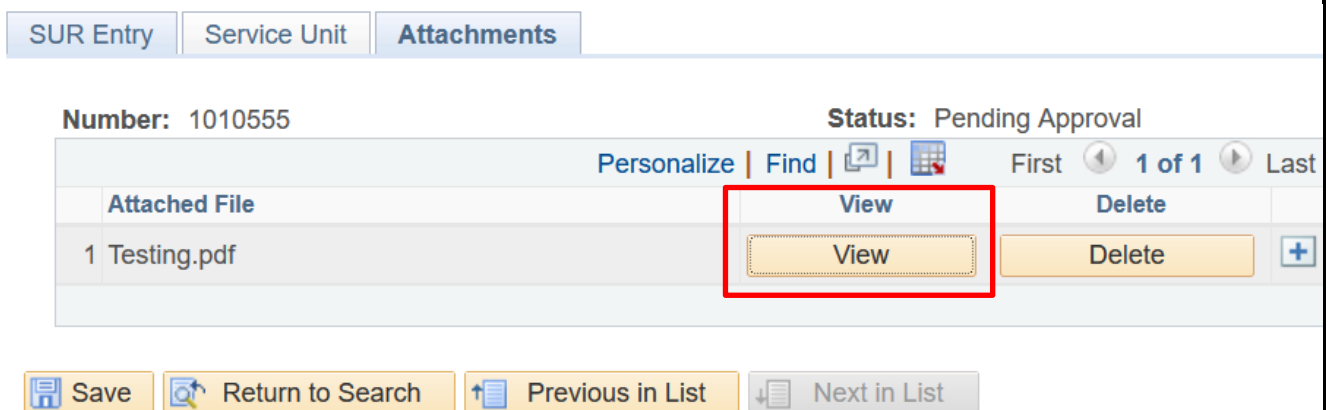
- 4    The **Required By** section is the requested date of action for the Service Unit.
- The **Org** section will only let you enter SUR's for Orgs for which you have security access.
- The **Building** and **Room** under **Location of Delivery/Work** is the location where delivery or work is requested. 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 does not provide enough description, the Service Unit will have to reach out for clarification and might cause a delay in the request fulfillment.

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.

**5** Once the user is finished entering all the SUR information, then you are ready to **Save**. Be sure to add any attachment needed before submitting for approval. Although, if you forgot to add before you click save, you can still add attachments until the it is approved. You are also able to View the attachment if you believe you uploaded the wrong file.

Click **Save**. Once Saved, it will be in pending approval status. A SUR in this status can be edited until it is approved. Attachments can be changed, CFS can be changed, locations can be updated. After the departmental approver approves it, it gets locked. Additionally, once approved, all emails that were input in the **Email** section will get an email with the **SUR number, Department, Description** (Request description textbox), and any **approver comments** that were entered as well.



The screenshot shows the 'Attachments' tab of a web interface. At the top, there are navigation tabs: 'SUR Entry', 'Service Unit', and 'Attachments'. Below the tabs, the 'Number' is 1010555 and the 'Status' is 'Pending Approval'. A table lists the attachments:

Attached File	View	Delete
1 Testing.pdf	<b>View</b>	Delete

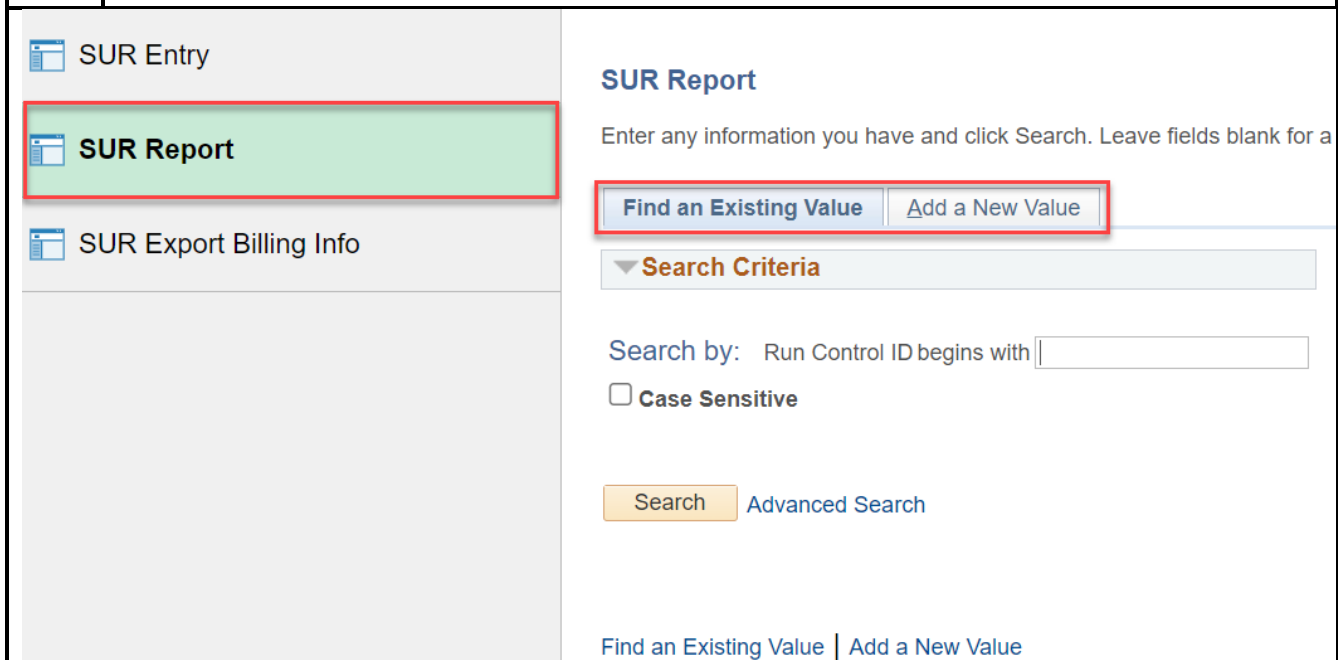
Below the table, there are navigation buttons: 'Save', 'Return to Search', 'Previous in List', and 'Next in List'. The 'View' button in the table is highlighted with a red box.

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

6

The **SUR Report** on the Menu is how you can make a PDF report of all SUR's that match your search criteria. You can search by any combination of SUR#, Date range entered, Service Unit, SUR Status, Org (you only have access to your Orgs), and Entity. If you are unsure if you entered a SUR to the appropriate Service Unit or what status it is, you could use this report to check.

Note: If you have not before, you will need to click on **Add a New Value** to create a Run Control ID. You can add more, but unless you are saving multiple different searches, you just need one. If you only have one, when you click search it will automatically pull it up. If you have more than one, they will all be listed. Once you have a Run Control ID selected and input your criteria, you can click on Run.



The screenshot shows a web application interface. On the left is a sidebar menu with three items: 'SUR Entry', 'SUR Report' (highlighted with a red border), and 'SUR Export Billing Info'. The main content area is titled 'SUR Report' and contains the following elements: a header instruction 'Enter any information you have and click Search. Leave fields blank for a', two buttons 'Find an Existing Value' and 'Add a New Value' (both highlighted with a red border), a 'Search Criteria' dropdown menu, a 'Search by:' label followed by a text input field containing 'Run Control ID begins with', a 'Case Sensitive' checkbox, a 'Search' button, and a link for 'Advanced Search'. At the bottom of the main area, there are links for 'Find an Existing Value' and 'Add a New Value'.

**SUR Report**

Run Control ID REPORT Report Manager Process Monitor Run

**Business Unit**  
Business Unit: NORMN

**SUR Number Range**  
From SUR #: 1001515  
To SUR #: 1010561

OR

**SUR Requested On Date Range**  
From Date: 12/01/2021  
Through Date: 04/18/2023

**Optional Parameters**  
Service Unit: Parking - Norman  
SUR Status: Approved  
Org: AGS04001  
Entity:

Save Return to Search Previous in List Next in List Notify Add Update/Display

**SUR Requested On Date Range**  
From Date: 04/01/2023  
Through Date: 04/30/2025

**Note: for the SUR report to pull anything you must either request a number range or date range. You can save your report with a set start date and a future date and it will pull all SUR's input from the start date. Ex. 12/01/2021 – 04/18/2023. If you pulled the report in May, you would have to update that through date unless you pick a future date.**

7 Once you have your parameters set and click run, the Process Scheduler Request will pop up. Make sure that your \*Format is set to **PDF** and then hit **OK**. Once you hit OK, you can either access the PDF through **Report Manager** or **Process Monitor**. Make sure your Process Request criteria are correct and then click **Details** next to the OUSURRPT you just ran. Click **View Log/Trace** and then click the .PDF link. Each Service Unit request is on a separate page so they do not get mixed up.

**NOTE: Process Monitor might be easier if you are needing to run multiple reports since Report Manager will not let you go back to the SUR Report screen once you click into a report unless you remember to right click and open the link as a new tab. Process Monitor will likely be easier to navigate. Both Process Monitor and Report Manager can be accessed outside the SUR Module through Reports and Query Viewer.**

Process Scheduler Request ✕

[Help](#)

User ID PARKNNKS      Run Control ID REPORT

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Server Name PSNT      Run Date 04/18/2023 📅

Recurrence       Run Time 10:51:27AM      Reset to Current Date/Time

Time Zone  🔍

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SUR Report	OUSURRPT	SQR Report	Web	PDF	Distribution

OK
Cancel

Process List
Server List

**View Process Request For**

User ID YOUR ID HERE

Server

Run Status

Type

Name

Distribution Status

Last  Days

Instance From  Instance To

Save On Refresh

[Report Manager](#)

**Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1277781		SQR Report	OUSURRPT	PARKNNKS	04/18/2023 10:51:27AM CDT	Success	Posted	<a href="#">Details</a>

**Process Detail**
✕

[Help](#)

**Process**

Instance	1277781	Type	SQR Report
Name	OUSURRPT	Description	SUR Report
Run Status	Success	Distribution Status	Posted

**Run**

Run Control ID: REPORT

Location: Server

Server: PSNT

Recurrence:

**Update Process**

Hold Request

Queue Request

Cancel Request

Delete Request

Re-send Content

Restart Request

**Date/Time**

Request Created On: 04/18/2023 10:54:27AM CDT

Run Anytime After: 04/18/2023 10:51:27AM CDT

Began Process At: 04/18/2023 10:54:39AM CDT

Ended Process At: 04/18/2023 10:54:52AM CDT

**Actions**

[Parameters](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

[Transfer](#)



View Log/Trace x

[Help](#)

**Report**  

Report ID 1277118	Process Instance 1277781	<a href="#">Message Log</a>
Name OUSURRPT	Process Type SQR Report	
Run Status Success		

SUR Report

**Distribution Details**  

Distribution Node FSTST	Expiration Date	04/25/2023
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**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">OUSURRPT_1277781.PDF</a>	6,047	04/18/2023 10:54:52.571922AM CDT
<a href="#">OUSURRPT_1277781.out</a>	0	04/18/2023 10:54:52.571922AM CDT
<a href="#">SQR_OUSURRPT_1277781.log</a>	2,229	04/18/2023 10:54:52.571922AM CDT

**Distribute To**

Distribution ID Type	Distribution ID
User	

Run Date: 18-APR-2023

**Service Unit Request**

General Information

Business Unit: NORMN  
 Number: 1010560 Status: Complete Requested On: 13-APR-2023  
 Requested By: 450150 Service Unit: Parking - Norman  
 Required By: 19-APR-2023 Department: CAS01001

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:  
 Building: College of Arts and Sciences Room: 4312  
 Email: Shawn-Massey@ouhsc.edu

Request Description

Estimate: N Attachments: N  
 Description: Need Test Info

Department Chartfield Information

Fund	Dept	Function	Entity	Project	Source	Purpose	Percentage
MISCA	CAS01001	00000	00000				100

Department Approver Information

Approved By: 423283 Approved On: 13-APR-2023

Service Unit Comments

Testing Service Unit Notes

Service Unit Chartfield Information

Fund	Dept	Funct	Entity	Project	Source	Purpose	Account	Amount	Billed
MISCA	CAS01001	00000	00000				920710	120.00	Y

