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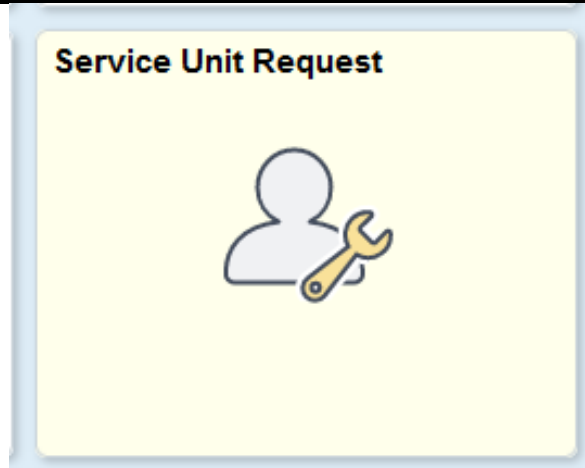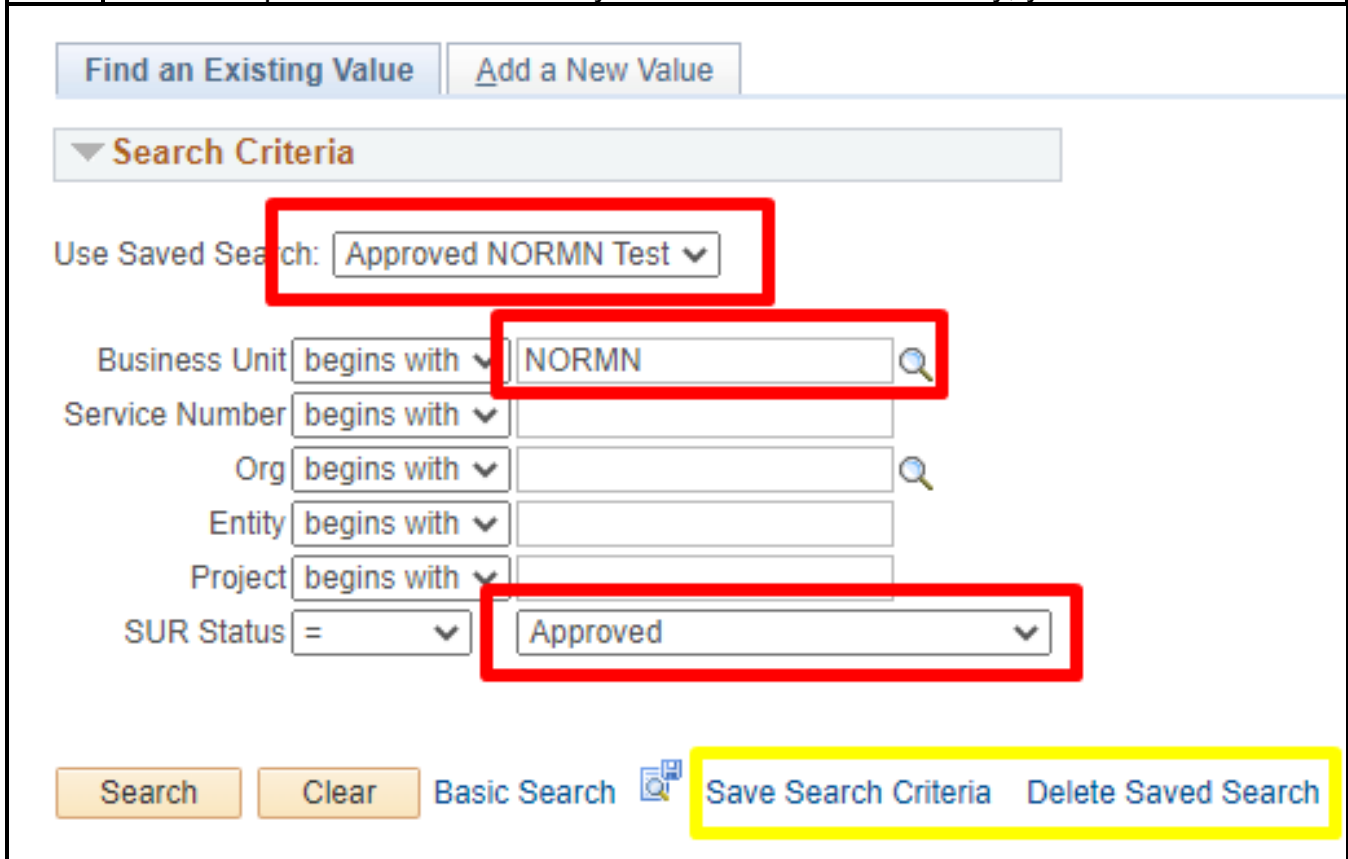| Step	Action
1	After logging into PeopleSoft Financials, you will access Service Unit Request(SUR) via the Home screen under **Service Unit Request** and it will default to **SUR Entry.** You can also get to the screen via **Nav Bar > Navigator > OU Main Menu > Service Unit Requests > SUR Entry.**
	Service Unit Request
2	Users can search for an existing SUR by using the **Find an Existing Value** tab. As a processor, you can save the search with whatever parameters you want as well as have multiple searches saved. If you save a search incorrectly, you can delete it.

Find an Existing Value   Add a New Value

▼ Search Criteria

Use Saved Search: Approved NORMN Test ▾

Business Unit [begins with ▾] NORMN 🔍
Service Number [begins with ▾]
Org [begins with ▾] 🔍
Entity [begins with ▾]
Project [begins with ▾]
SUR Status [= ▾] Approved ▾

Search   Clear   Basic Search 🔖   Save Search Criteria   Delete Saved Search

3	Once you select a transaction that is approved and ready for billing, you can search the **Approved transactions** and select the desired Service Unit Request. Once you select that, go to the **Service Unit Tab** at the top.

Search Results

View All   First ◀ 1-11 of 11 ▶ Last

Business Unit	Service Number	Service Unit	Requested Date	Org	Entity	Project	SUR Status
NORMN	1010542	Parking	03/08/2023	CAS01001	00000	(blank)	Approved
NORMN	1010543	Parking	03/08/2023	CAS01001	00000	(blank)	Approved
NORMN	1010544	Parking	03/08/2023	CAS01001	00000	(blank)	Approved
NORMN	1010545	Parking	03/08/2023	CFA04001	00000	(blank)	Approved
NORMN	1010546	Parking	03/08/2023	CFA09001	00000	(blank)	Approved
NORMN	1010547	Parking	03/08/2023	CFA04001	00000	(blank)	Approved
NORMN	1010548	Parking	03/09/2023	CFA04001	00000	(blank)	Approved
NORMN	1010553	Parking	03/27/2023	ADN03080	00000	(blank)	Approved
NORMN	1010555	Parking	03/28/2023	CAS01008	00000	(blank)	Approved
NORMN	1010556	Parking	03/28/2023	CAS05002	00000	(blank)	Approved

SUR Entry | **Service Unit** | Attachments

4	Once you type any Service Unit Notes for other Service Unit Processors and the SUR Enterer to see, you will have to either enter the Chart Field Spread or click the **Load CF Values from Entry Page** button. Once you either enter the values manually, or load them from the entry page, you are ready to "bill" the customer. The **Hold** checkbox will prevent that Line item from billing. If multiple lines are entered, but only some of them are needing to be billed, check the box for all lines that will not be billed that month. Once all applicable lines are excluded, you are **Ready to Bill**.

Update Status: [▼]

[Load CF values from Entry Page]   [Clear All CF Values]   ☐ **Ready to Bill**

Billing

	Hold	Account	Fund	Dept	Function	Entity	Source
1	☐	[🔍]	[🔍]	[🔍]	[🔍]	[🔍]	[🔍]

SUR Entry | Service Unit | Attachments

Business Unit: NORMN   Number: 1010544   Status: Approved

Service Unit Notes

Update Status: Complete

Kaytlin Stone

Clear All CF Values   ☐ Ready to Bill

Billing   Personalize | Find | 📊 📊   First ◁ 1-2 of 2 ▷ Last

Hold		Account	Fund	Dept	Function	Entity	Source	Purpose	Project	Amount	SUID	Ext ID	Description		
1	☐	920710	EGFEE	CAS01002	00000	00000				500.000	7777		SUR# 1010544	➕	➖
2	☐	920710	EDGEN	CAS01001	00000	00000				500.000	7777		SUR# 1010544	➕	➖

💾 Save   🔍 Return to Search   ↑ Previous in List   ↓ Next in List

SUR Entry | Service Unit | Attachments

PLEASE NOTE: Only mark Ready to Bill if all line items that are unchecked are ready to be billed. There is no undo button so to fix it, email correspondence would have to be with the Service Unit Billing Department to stop the billing if Ready to Bill is marked prematurely.

5	Once the user is finished filling out all the SUR billing information, then you are almost ready to **Save.** Be sure to check the hold box for every line that is not needing to be billed that month or make sure the Ready to Bill box is unchecked. If you mark ready to bill and change the update status to complete, the Service Unit Notes are locked and unable to be edited further. Once you are ready click **Save.** Once Saved, it will be in whatever status you selected. Attachments can be changed until the SUR has been saved with the Ready to Bill checked.

Any time you Change the status before billing, the Enterer and Processor get an email that follows this format:

SUR 1010560 - Status Change

S   SUR@ouhsc.edu
     To   Enterer@OU.EDU
     Cc   Processor@OU.EDU

ⓘ Follow up. Start by Thursday, April 13, 2023. Due by Thursday, April 13, 2023.

SUR 1010560 has been updated to a status of Approved.

Service Unit: Parking - Norman
Description: Need Test Info
Approver Comments: Approver Comments Here
Service Unit Comments: Testing Service Unit Notes

6	Monthly, you will need to send the billable Requests to the Service Unit Accounting team. You can search through the SUR's and mark any SUR's that are complete and needing to be billed as Ready to Bill.

| 7 | Once you have selected the SUR, loaded the CF values from the Entry Page or manually typed them, and mark **Ready to Bill** for each SUR, you are ready to go to **SUR Export Billing Info** on the left side menu.

If you have not before, you will need to click on **Add a New Value** to create your Run Control ID. 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, you can click on Run.

SUR Export Billing Info will only export SUR information that has been marked Ready to Bill and has not been exported already. |
|---|---|

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SUR Entry

SUR Report

SUR Export Billing Info

SUR Export Billing Info

Enter any information you have and click Search. Leave fields blank

| Find an Existing Value | Add a New Value |

▼ **Search Criteria**

Run Control ID `begins with ▾` [   ]

☐ Case Sensitive

| Search | Clear | Basic Search | Save Search Criteria

Search Results

View All First ◄ 1-2 of 2 ► Last

Run Control ID	Language Code
REPORT	English
REPORT2	English

Export Billing Info

Run Control ID REPORT   Report Manager   Process Monitor   Run

💾 Save   ⟳ Return to Search   ⬆ Previous in List   ⬇ Next in List   ✉ Notify   ➕ Add   ⬜ Update/Display

8	When you schedule the Export Billing Info Process, you need to make sure the format is showing as CSV. Once you are sure that the Format is CSV, hit **OK**.

9	To get your CSV file with the billing info, click on Process Monitor, make sure your Process Request parameters are showing your user ID and the time frame you need to find the process. It should default to last 1 day, but you can search for prior reports if you lose one. Once you find your process, click on details and then **View/Log Trace** and click on the .csv hyperlinked name on the left side of the pop up. You could also use the Report Manager, but once you open the report from that SUR Report screen, it doesn't let you go back to the SUR Report screen.

Process Detail

Process

Instance   1277767   Type   SQR Report

Name   OUSUREXP   Description   Export Billing Info

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

Date/Time

Request Created On   04/17/2023   4:11:28PM CDT

Run Anytime After   04/17/2023   4:08:39PM CDT

Began Process At   04/17/2023   4:11:48PM CDT

Ended Process At   04/17/2023   4:12:01PM CDT

Actions

Parameters   T

Message Log

Batch Timings

View Log/Trace

OK   Cancel

View Log/Trace

×

Help

Report

Report ID 1277104 Process Instance 1277767

Name OUSUREXP Process Type SQR Report

Message Log

Run Status Success

Export Billing Info

Distribution Details

Distribution Node FSTST Expiration Date 04/24/2023

File List

Name	File Size (bytes)	Datetime Created
OUSUREXP_1277767.csv	197	04/17/2023 4:12:01.012955PM CDT
OUSUREXP_1277767.out	0	04/17/2023 4:12:01.012955PM CDT
SQR_OUSUREXP_1277767.log	2,253	04/17/2023 4:12:01.012955PM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	USER ID HERE

Return

10	The CSV file will always have any lines that have not been exported previously and are marked as Ready to Bill by the time the export process is run.

BATCH	SUID	EXT. ID	GL ACCT	FUND	ORG	FUNCTION	ENTITY	SOURCE	PURPOSE	PROJECT	TOTAL AMT	DESCRIPTION
	7777		920710	MISCA	CAS01001	00000	00000				120	SUR# 1010560