

Create a Purchase Requisition, Track a Purchase Requisition, Receiving and/or Rejecting.

Log into Self-Service at <https://ss.eosc.edu/Student/Account/Login> using your regular Eastern User ID.

From the home menu click on Financial Management

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Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

- Student Finance**
Here you can view your latest statement and make a payment online.
- Financial Aid**
Here you can access financial aid data, forms, etc.
- Tax Information**
Here you can change your consent for e-delivery of tax information.
- Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Student Planning**
Here you can search for courses, plan your terms, and schedule & register your course sections.
- Course Catalog**
Here you can view and search the course catalog.
- Grades**
Here you can view your grades by term.
- Graduation Overview**
Here you can view and submit a graduation application.
- Enrollment Verifications**
Here you can view and request an enrollment verification.
- Transcript Requests**
Here you can view and request a transcript.
- Academic Attendance**
Here you can view your attendances by term.
- Advising**
Here you can access your advisees and provide guidance & feedback on their academic planning.
- Faculty**
Here you can view your active classes and submit grades and waivers for students.
- Financial Management**
Here you can view the financial health of your cost centers and your projects.

Select Procurement from the Financial Management Overview

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Daily Work > Financial Management > Financial Management Overview

Financial Management Overview

- Approve Documents**
Here you can approve a list of financial documents.
- Budget to Actuals**
Here you can view the financial health of your cost centers.
- Finance Query**
Here you can query your financial data.
- Receive Goods and Services**
Here you can receive or reject purchase order line items.
- Procurement**
Here you can create and maintain your procurement documents.
- Projects Accounting**
Here you can view the financial health of your projects.

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Here you can view all your Requisitions and see the status of each one.

Procurement

View Create

Filter

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
5/20/2021	0027717 PO Created 0113919 Itsavvy, LLC.	\$1,978.23	Trisha White (+1)
5/4/2021	0027620 PO Created 0113919 Itsavvy, LLC.	\$271.09	Trisha White (+1)

You can also view your approved purchase orders.

Procurement

View Create

Filter Collapse All

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Purchase Order

Purchase Order Date	Purchase Order	Total
5/19/2021	P0030889 Outstanding 0113919 Itsavvy, LLC.	\$1,978.23
5/7/2021	P0030788 Paid 0113919 Itsavvy, LLC.	\$271.09

Clicking on the requisition number will pull up the information in a box on the right side of your screen. You can also click the Line Items to view each item on the requisition. The same can be done on purchase orders!

Procurement

View Create

Filter Collapse All

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
5/20/2021	0027717 PO Created 0113919 Itsavvy, LLC.	\$1,978.23	Trisha White (+1)
5/4/2021	0027620 PO Created 0113919 Itsavvy, LLC.	\$271.09	Trisha White (+1)
4/21/2021	0027533 PO Created 0113919 Itsavvy, LLC.	\$1,299.50	Trisha White (+1)
4/15/2021	0027487 PO Created 0081433 Cdw Government, Inc.	\$4,696.75	Trisha White (+1)
3/31/2021	0027367 PO Created 0113919 Itsavvy, LLC.	\$803.56	Trisha White (+1)
3/29/2021	0027348 PO Created 0113919 Itsavvy, LLC.	\$107.70	Trisha White (+1)
1/4/2021	0027003 PO Created 0113919 Itsavvy, LLC.	\$5,853.07	Trisha White (+1)
12/10/2020	0026977 PO Created 0085670 Micro-Tel, Inc.	\$1,150.00	Trisha White (+1)

Requisition Details

[0027620](#)

Overview Approvers **Line Items**

Status PO Created

Vendor 0113919 Itsavvy, LLC.

Amount \$271.09

Maintenance Date 5/4/2021

Initiator Mr. George V. Larson

Requestor Mr. George V. Larson

Purchase Orders [P0030788](#)

Attachments

Additional Details

Request Date 5/4/2021

Status Date 5/7/2021

Desired Date

AP Type EG E&G Payables

Ship To WB EOSC - Main Campus

Commodity

Printed Comments

Creating a Purchase Request is very simple. Click the Create option. Default information like Initiator, Requisition Date, Confirmation email, and Ship To address are already filled in. You can change the Ship To address from the drop down box. If the Address you are trying to ship to is not there, please contact the Business Office to have it added to the list.

The screenshot shows the 'Create' form for a Purchase Request. The form is divided into several sections:

- Document Type:** Requisition (dropdown)
- Requisition Date:** 06/23/2021 (calendar icon)
- Initiator:** Mr. George V. Larson (lookup field)
- Confirmation Email Address:** glarson@eosoc.edu (text field)
- Ship To:** WB EOSC - Main Campus (dropdown menu with options: AN EOSC - Antlers, IB EOSC - Idabel, MC EOSC - McAlester, WB EOSC - Main Campus)
- Desired Date:** MM/DD/YYYY (calendar icon)
- Miscellaneous Vendor:** Misc Vendor (text field) with a checkbox for Person Vendor.
- AP Type:** None (dropdown)
- Tax Code 1, 2, 3:** All set to None (dropdowns)
- Approvers:** Table with columns for Approvers and Approval Date.
- Next Approvers:** Next Approver Lookup (lookup field)
- Printed Comments:** Text area
- Internal Comments:** Text area
- Items:** Table with columns: Line Items, Description, Vendor Part, Quantity, Unit, Price, Extended Price. Includes an 'Add Item' button.

If you know it, you can enter the vendor id in the Vendor Lookup field. Otherwise type part or all of the name and hit enter to look up the vendor.

The screenshot shows the 'Vendor ID' lookup field in the 'Create' form. The dropdown menu is open, showing search results for 'Active'. The results are:

- Active Minds, Inc** 0115746
2001 3 Street, NW Ste 630 Washington DC 20009-1165
(B-Business)
- National Association for Campus Act** 0095869
13 Harbison Way Columbia SC 29212-3401
(CK-Check Address)
- Oklahoma Secondary School** 0085995
7300 N Broadway Ext. Oklahoma City OK 73116
(CK-Check Address)

Click the Add Item to add a new item to the requisition. Fill in the Description, Vendor Part, Quantity, Unit, and price. If you know the GL Account you can fill that in. If you don't you can type part of the description! I am entering a requisition for a box of black ink pens, this will be charged to the supplies GL Account. By entering supp and hitting enter the system returns the GL Accounts that I have access to that have the partial word supp in the description.

The screenshot shows the 'Items' section of a requisition form. At the top, there is a table with columns: Line Items, Description, Vendor Part, Quantity, Unit, Price, and Extended Price. Below this is the 'New Item' section with the following fields:

- Description *: black ink pens
- Vendor Part: (empty)
- Quantity *: 1
- Unit: BX box
- Price: 9.9900
- Extended Price: \$9.99
- GL Account *: A dropdown menu is open, showing a list of accounts. The search field contains 'supp'. The list includes:
 - 290-11-14103-5361300 McAlester Audio Visual : Office Supplies/ Non-Exp
 - 290-11-14103-5361400 McAlester Audio Visual : Office Supply/ Expendable
 - 290-11-14103-5361409 McAlester Audio Visual : Supplies/ Credit Card Clearing
 - 290-11-14103-5361500 McAlester Audio Visual : Data Processing Supplies
 - 290-11-14103-5361900 McAlester Audio Visual : Educational Supplies
- Project: None
- Amount: 9.99

Buttons for 'Cancel' and 'Save' are visible at the bottom right. The 'Add Item' button is highlighted in green.

Once you have filled in the information, and if you have more items, click the Add Item button to add the current item to the Requisition. Then click the Add Item again to add the next item to the requisition.

Click the Save button when you are done to have the Requisition created and sent to the next person for approval.

The screenshot shows the bottom of the requisition form. It contains the following buttons:

- Add GL Account (grey)
- Cancel (white)
- Add Item (blue, highlighted in green)
- Cancel (white)
- Save (blue, highlighted in green)

To Receive items for a purchase order, click on the purchase order, then click Receive on the Purchase Order Details screen.

The screenshot shows a procurement system interface. On the left, there is a list of purchase orders with columns for 'Purchase Order Date', 'Purchase Order', and 'Total'. One entry is highlighted with a yellow background, showing a date of 5/19/2021 and a purchase order number P0030889. On the right, a 'Purchase Order Details' sidebar is open, showing a 'Receive' button highlighted in yellow. A red arrow points from this button back to the highlighted purchase order in the list.

You can also Receive from the Financial Management screen by selecting Receive Goods and Services

The screenshot shows the 'Financial Management Overview' screen for Eastern Oklahoma State College. It features several menu items: 'Approve Documents', 'Finance Query', 'Procurement', 'Budget to Actuals', 'Receive Goods and Services', and 'Projects Accounting'. The 'Receive Goods and Services' option is highlighted with a yellow background.

You can look up your Purchase order by Vendor or Purchase Order Number

The screenshot shows the 'Procurement Receiving' screen. It has a search section for 'Receive Goods and Services' with fields for 'Vendor' (containing 'ITSevvy') and 'Purchase Order Number' (with a dropdown menu open showing 'P0030889' selected). Below this is a table of items to be received.

Vendor/ Document	Item	Quantity	Qty Accepted
Itsavvy_Llc_(0113919) P0030889	20150938 EVGA Power Supply	2.000 EA	<input type="text"/>
Itsavvy_Llc_(0113919) P0030889	22771624 Surface Pro 7+	1.000 EA	<input type="text"/>
Itsavvy_Llc_(0113919) P0030889	16878459 PageWide Pro 577DW	1.000 EA	<input type="text"/>
Itsavvy_Llc_(0113919) P0030889	Shipping	1.000 EA	<input type="text"/>

Enter the quantity received and hit submit at the bottom.

Procurement Receiving

Receive Goods and Services

Choose a Vendor and/or PO to filter lines shown:

Vendor: Itsavvy

Purchase Order Number: None

The following apply to all lines received

Packing Slip:

Arrived Via: None

Accept All

Vendor/ Document	Item	Quantity	Qty Accepted	MSDS Rcvd	Reject/ Return
Itsavvy, Llc (0113919) P0030889	20150938 EVGA Power Supply	2,000 EA	<input type="text" value="2"/>	<input type="checkbox"/>	<input type="button" value="R"/>
Itsavvy, Llc (0113919) P0030889	22771624 Surface Pro 7+	1,000 EA	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="R"/>
Itsavvy, Llc (0113919) P0030889	16878459 PageWide Pro 577DW	1,000 EA	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="button" value="R"/>
Itsavvy, Llc (0113919) P0030889	Shipping	1,000 EA	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="button" value="R"/>

If you need to return an item you will click the Reject/Return icon on that line item.

Here you will enter the quantity rejected, how the item(s) are returned, and the return reason. You can also enter any comments and a confirmation email address.

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Receive Goods and Services

Vendor: Itsavvy, Llc (0113919) Purchase Order: P0030889

Item: 22771624 Surface Pro 7+

Reject Quantity *

Reject Quantity is required.

Return Via: Return Date *: 06/23/2021

Return Authorization Number: Return Reason *: BNT Bent

Return Comments:

Confirmation Email Address:

Accept All

Item	MSDS Rcvd	Reject/ Return
20150938 EVGA	<input type="checkbox"/>	<input type="button" value="R"/>
22771624 Surface	<input type="checkbox"/>	<input type="button" value="R"/>
16878459 PageW	<input type="checkbox"/>	<input type="button" value="R"/>
Shipping	<input type="checkbox"/>	<input type="button" value="R"/>