

REVIEWING AND APPROVING REQUISITIONS IN ESM

ESM is YC's new procurement software. Requisitions can no longer be entered or approved via Banner – the Procurement team is asking that Purchasing Liaisons and Budget Managers now enter and approve requisitions via ESM. There are 2 ways requisitions can be viewed/ approved:

1. Approving from an Email Notification

When a requisition has been entered that requires your approval, you will receive an email from noreply@esmsolutions.com that looks similar to the below:

Training - Review and Approve: 266149 - 02/12/2026 12:38-Ream-Aardvark Clay & Supplies [Summarize](#)

Dear Kelsey,

Kelsey Ream has requested your review and approval of Transaction 266149 - 02/12/2026 12:38-Ream-Aardvark Clay & Supplies. Please click below "Review & Approve" button to log into the ESM Purchase application to take appropriate action.

Transaction # : 266149
Create Date : 02/12/2026
Supplier : Aardvark Clay & Supplies
Requester : Kelsey Ream
Status : Pending Approval
Total Line Items : 3
Subtotal : 10100.00
All Sales Tax : 0.00
S & H : 0.00
Total Value (USD) : 10100.00

[Review & Approve](#)

If you wish to contact the requestor, please do so at Kelsey.Ream@yc.edu.

The email contains some summary information about the requisition (creation date, supplier name, requestor name, and total cost of the proposed purchase). **Click on the blue Review & Approve button to navigate to ESM and review/ approve the requisition.**

Clicking on the Review & Approve button will take you to the following screen:

Approve

General Details

Payment Form: PO Need By Date: 08/01/2026

Release Method: Manual Commodity Code: 050 - Art Equipment and Supplies

Order Type: Standard Facilities?: No

Purchase Order #: 243 Receipt Required: ☐

Fiscal Date: 04/12/2026

Project Name: Clay for Art Department

[CONTINUE](#)

Order Release Details [View](#)

Delivery Details Attn: Kelsey Ream Location: Prescott Campus [Change](#)

Billing Details Attn: Accounts Payable Location: Accounts Payable [Change](#)

GL Details [Change](#)

Line Item Details (Total: 3) [Change](#)

View Workflow Details [Change](#)

[APPROVE](#) [REJECT](#) [AD HOC REVIEW](#)

Transaction Summary

Transaction #: 266149
Purchase Order #: 243
Create Date: 02/12/2026
Supplier: Aardvark Clay & Supplies
Requester: Kelsey Ream
Cart Originator: Kelsey Ream
Approve Arrival Date: 05/04/2026
Selection: Active
Status: Pending Approval
System Note: History
Total Line Items: 3
Subtotal: 10,100.00
Tax: 0.00
S & H: 0.00
Total Value (USD): 10,100.00

Transaction Name

02/12/2026 12:38-Ream-Aardvark Clay & Supplies

Notes and Attachments

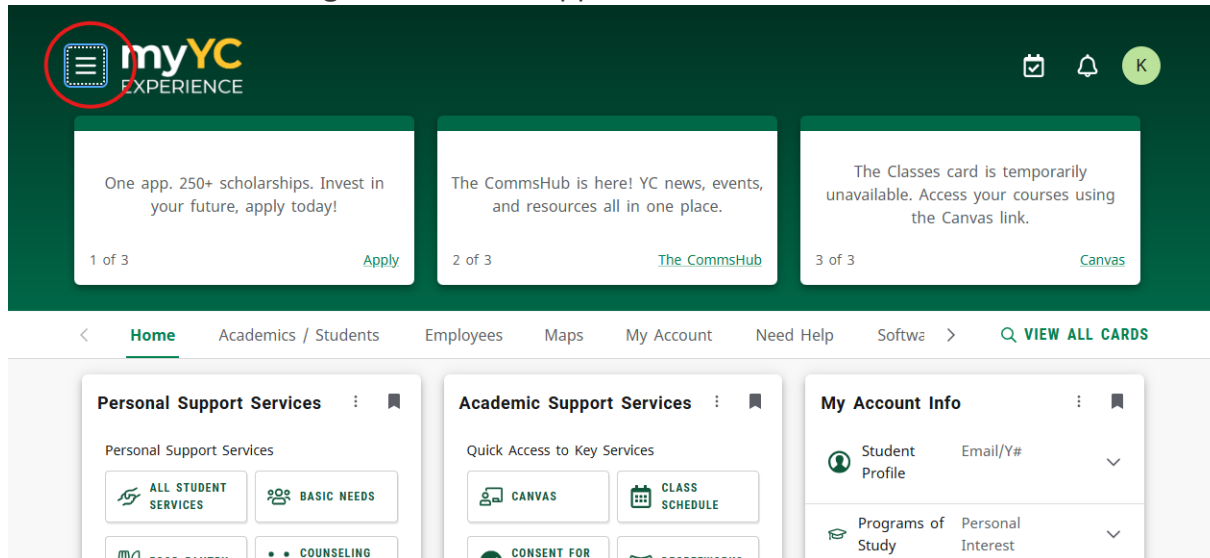
Internal Note [Add](#) [View](#) External Note [Add](#) [View](#)

To approve the requisition, click on the blue **APPROVE** button in the lower left corner.

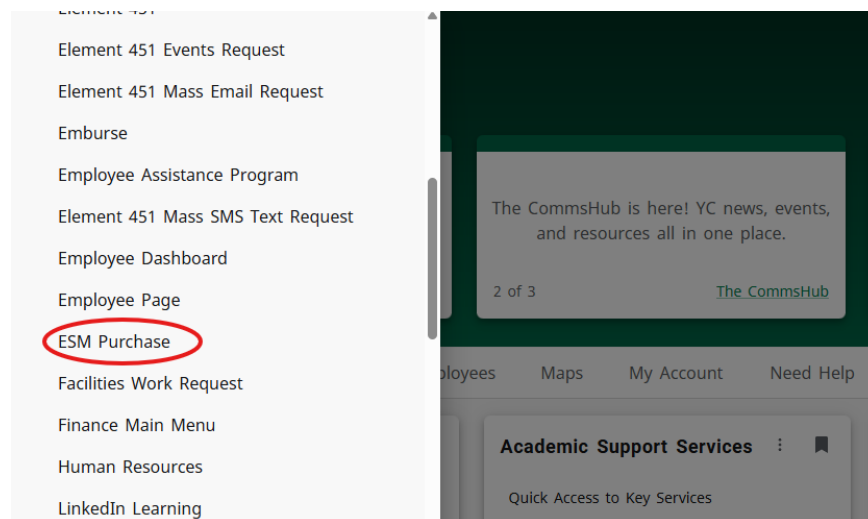
To view additional details about the requisition, click on the GL Details section (FOAP information), the Line Item Details section (detailed description(s) of all line items listed on the requisition), View Workflow Details (who has already approved/ still needs to approve), or review the Transaction Summary box in the upper right corner.

2. Approving from the Main ESM Home Page

Navigate to <https://www.yc.edu/> and select the yellow myYC box in the upper righthand corner of the screen. Select the hamburger menu in the upper left corner of the screen,

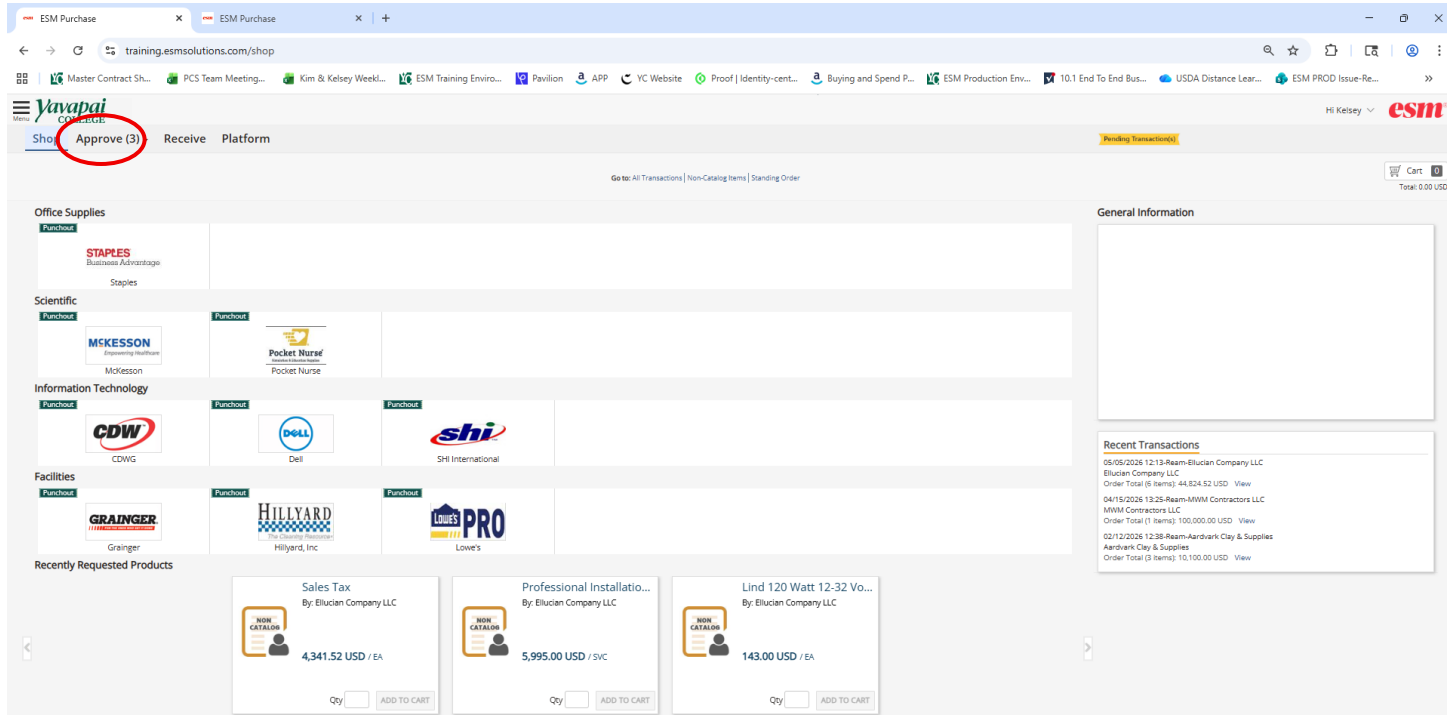


Select Employees, and scroll down until you see the link for ESM Purchase.

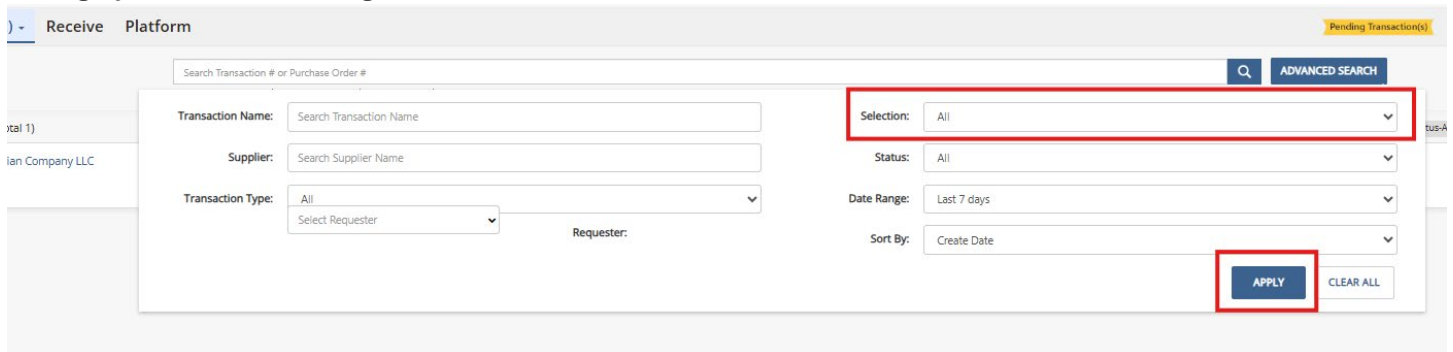


You will be logged in to the system via single sign on.

This will take you to the ESM Homepage. **Next, click on the Approve tab in the upper left corner.**

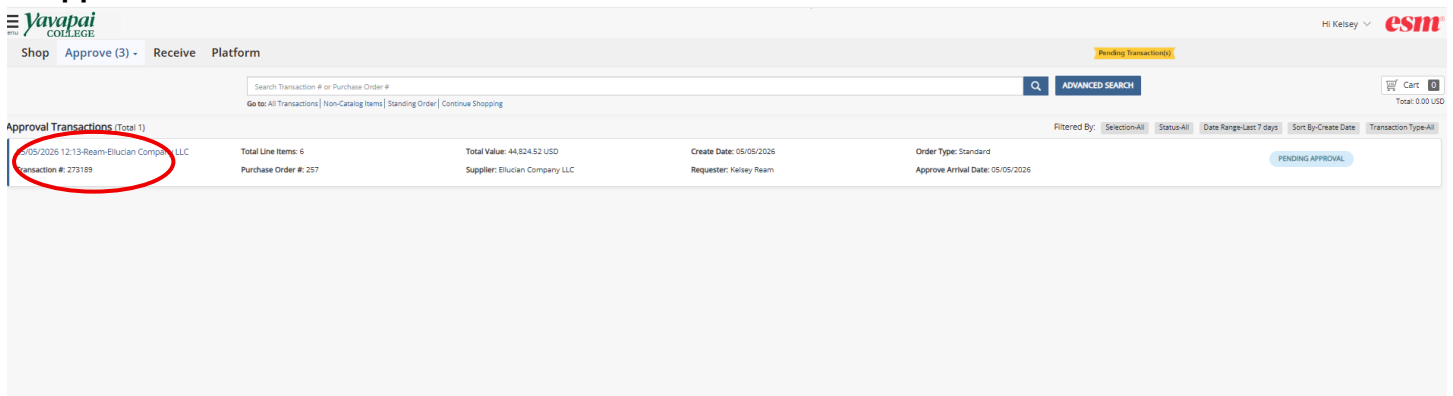


From here, it should show a list of all transactions requiring your approval. If it does not, you may need to change your search settings. **Click on Advanced Search.**



Make sure the Selection field is set to all, like the image above. Then click on the blue APPLY button.

ESM should now show all transactions requiring your approval. **Click on the transaction you would like to approve.**



To approve the requisition, click on the blue **APPROVE** button in the lower left corner.

To view additional details about the requisition, click on the GL Details section (FOAP information), the Line Item Details section (detailed description(s) of all line items listed on the requisition), View Workflow Details (who has already approved/ still needs to approve), or review the Transaction Summary box in the upper right corner.

The screenshot shows the Yavapai College requisition approval interface. At the top, there's a navigation bar with 'Shop', 'Approve (3)', 'Receive', and 'Platform'. A search bar is present with the text 'Search Transaction # or Purchase Order #'. Below this, the 'Approve' section is active, showing 'General Details' for a requisition. Key information includes: Payment Form: PO, Release Method: Manual, Order Type: Standard, Purchase Order #: 257, Fiscal Date: 05/05/2026, Project Name: TEST, Need By Date: 06/30/2026, Commodity Code: 204 - Computer Hardware and Peripherals for PCs, All Sales Tax: Non-Taxable, Facilities?: No, and Receipt Required: checked. A 'CONTINUE' button is visible. On the right, a 'Transaction Summary' box displays details like Transaction #: 273189, Purchase Order #: 257, Create Date: 05/05/2026, Supplier: Elucian Company LLC, Requester: Kelsey Ream, Cart Originator: Kelsey Ream, Approve Arrival Date: 05/05/2026, Selection: Active, Status: Pending Approval, System Note: History, Total Line Items: 6, Subtotal: 44,824.52, All Sales Tax: 0.00, S & H: 0.00, and Total Value (USD): 44,824.52. Below the summary, 'Transaction Name' and 'Notes and Attachments' are shown. At the bottom left, three buttons are visible: 'APPROVE' (circled in red), 'REJECT', and 'AD HOC REVIEW'.

After clicking **APPROVE**, you may get a pop-up that looks like this. This means you are an approver at multiple levels (for instance, you might be the approver at both the Budget Manager and Dean/Director level). Typically you will want to click the blue **APPROVE ALL STEPS** button – this records all your approvals at once so that you do not need to go in and approve the requisition again later in the workflow.

The screenshot shows a pop-up dialog box titled 'Approve' with a close button (X) in the top right corner. The dialog contains the following text: 'You are required to approve this transaction at multiple workflow steps.' followed by a bulleted list: 'Click **APPROVE ALL STEPS** to complete all required approvals in one action.' and 'Click **APPROVE INDIVIDUALLY** if you want to approve each step individually.' Below this, a note states: 'Note: If you are listed on the final approval step and choose **APPROVE ALL STEPS**, the final step will shift to an unapproved step (if any remain) in the workflow. See **View Workflow Details** section for more information.' At the bottom, there are three buttons: 'APPROVE ALL STEPS' (circled in red), 'APPROVE INDIVIDUALLY', and 'CANCEL'. The background of the dialog is semi-transparent, showing the requisition details from the previous screenshot, including the 'Need By Date', 'Commodity Code', 'All Sales Tax', and 'Transaction Summary'.

You may also get a pop-up that looks like this. This is a “soft” check of the budget associated with the FOAP(s) entered on this requisition, and means that this FOAP does not currently have sufficient funds to cover the total cost of this requisition. This does not stop the processing of the requisition, and you can click YES to continue the approval process. You may want to follow up with the Business Office Director if you have questions about your budget.

