

ELLUCIAN PURCHASE[™]

END USER TRAINING GUIDE



YAVAPAI COLLEGE

*DEPARTMENT OF
PROCUREMENT & CONTRACT
SERVICES*

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I. Introduction

Yavapai College has implemented **ESM Purchase**, a new eProcurement system provided by ESM Solutions. ESM Purchase is an internet browser-based application that Purchasing Liaisons and Budget Managers will use to enter and approve requisitions, and from which the Procurement team will submit purchase orders to Suppliers. The system is configured to automate approval workflows and related business processes, plus allow the management, tracking and reporting of eProcurement data.

1. Purpose

The purpose of this document is to provide users of the ESM Purchase system with basic information about system functionality related to placing and submitting orders.

2. Support Resources

Please contact the following Yavapai College system administrators for additional ESM Purchase system information or support assistance.

Support Contact	Email Address
Procurement & Contract Services Team	procurement@yc.edu

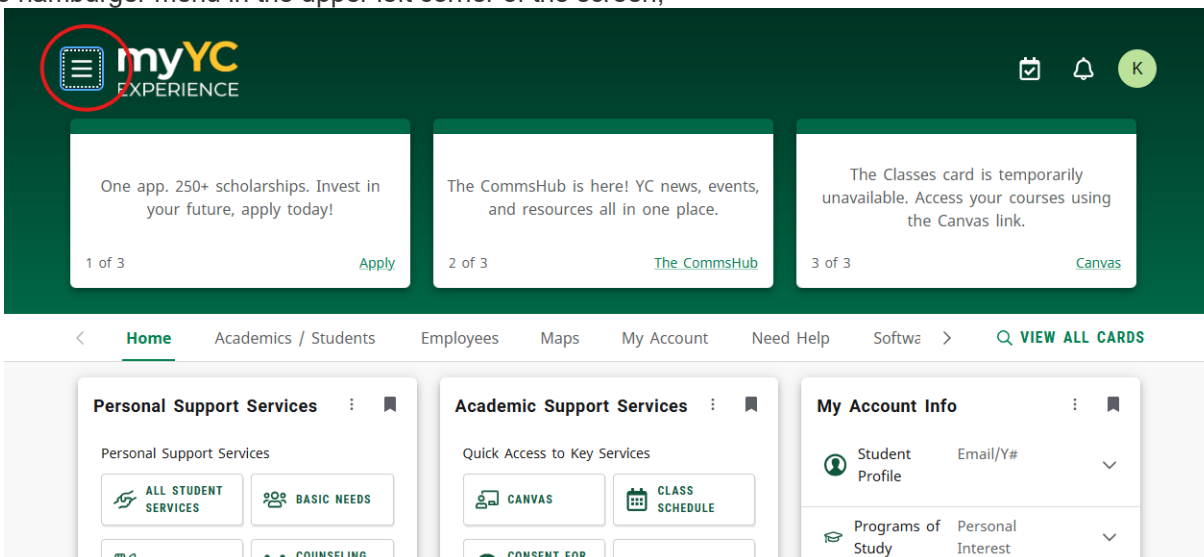
II. Basic Access

The purpose of this section is to provide basic information related to accessing ESM Purchase.

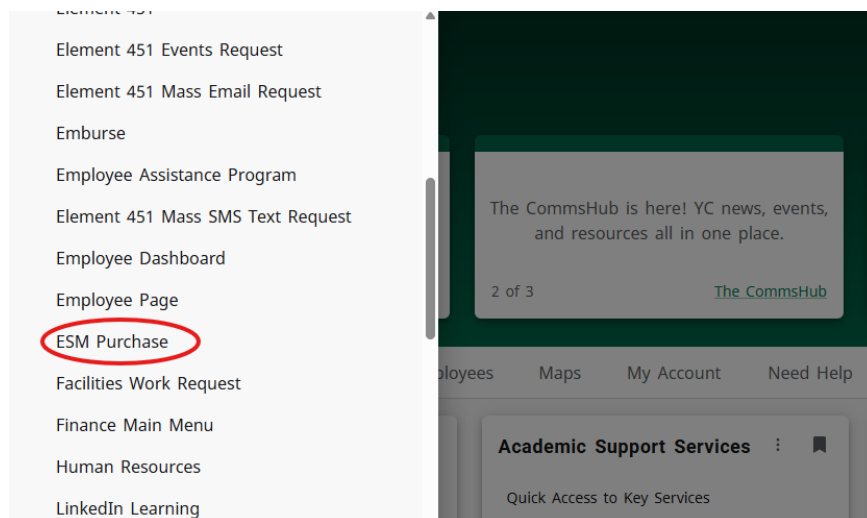
1. Logging In

The ESM Purchase system must be accessed via a web browser. The following are the supported browser types that can be used to access the system: **Firefox, Chrome, Internet Explorer, Safari**

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. If you are unable to access ESM purchase this way, you may need to be set up with an account. If this happens, send an email to procurement@yc.edu explaining that you need to be set up with access.

2. Navigating in ESM

Upon logging into ESM Purchase, the Shop tab will display, along with the following navigational and informational areas and tools:

Navigation Area – Access to the **Shop**, **Cart**, **Checkout**, and **Non-Catalog Items** tabs / pages. Refer to the sections below for more information on these pages and tools.

Supplier Catalog Navigation Area – Provides direct access to supplier catalogs organized by category.

Menu

Shop
Approve (0)
Receive
Platform

Go to: All Transactions | Non-Catalog Items | Standing Order

Office Supplies

Punchout Staples	Punchout Amazon	
-------------------------	------------------------	--

Scientific

Punchout McKesson	Punchout Pocket Nurse	
--------------------------	------------------------------	--

Information Technology

Punchout CDWG	Punchout Dell	Punchout SHI International	
----------------------	----------------------	-----------------------------------	--

Facilities

Punchout Grainger	Punchout Hillyard, Inc	Punchout Lowe's	
--------------------------	-------------------------------	------------------------	--

III. Submitting Requisitions in ESM

1. Punch-Out Catalog Suppliers

ESM Purchase contains a variety of hosted and punch-out supplier catalogs with pre-negotiated items and pricing available through contracts directly with companies or via cooperative suppliers. The following provides more information on system catalogs:

(a) What are Punch-out Catalogs?

- Provide item/service/pricing information on supplier websites external to the ESM Purchase system.
- Requestors click the tile associated with the supplier that they want to shop from, and the system “punches out” to the supplier website just as if you were shopping directly on their page. Once you are done shopping you “check-out” and return to ESM to finish the purchase.

Questions or concerns related to supplier catalogs and products should be sent to procurement@yc.edu.

(b) Available Punch-out Catalogs

- The following punchout supplier catalogs are available from ESM Purchase:
 - Amazon Business – Office Supplies, IT Equipment, Cleaning Products, MRO Tools / Supplies
 - Staples – Office Supplies, IT Equipment, Cleaning Products, Shipping Supplies, Furniture
 - McKesson – PPE, Needles/Syringes, Laboratory Supplies, Durable Medical Equipment
 - Pocket Nurse – Preconfigured Kits (RN/LPN), Demo Dose Medication Simulations, Clinical Supplies
 - CDW – Computer Hardware, Software, Computer Peripherals, Cloud Based Solutions & Storage
 - Dell – Laptops, Desktops, Monitors, Servers & Data Storage, Computer Peripherals, Software
 - Shi - Computer Hardware, Software, Computer Peripherals
 - Grainger – MRO Supplies, Industrial Equipment, Safety Products
 - Hillyard - Concentrated Floor Care Chemicals, Janitorial Cleaning Tools, and Mechanized Cleaning Equipment
 - Lowes PRO - High-volume Items for Construction and MRO (Building Materials, Plumbing, Electrical, Hardware)

NOTE: If you have additional catalog candidates, please email to procurement@yc.edu and the procurement team will review your suggestion.

2. How to Place an Order Using a Punch-out Catalog Supplier

The ESM landing page will show the currently available catalog suppliers YC Purchasing Liaisons can utilize. The requestor can place catalog orders from this landing page using a **PO** (for orders over \$10K) or **P-Card** (for orders under \$10K and not a capital asset).

The screenshot displays the Yavapai College ESM Purchase system interface. At the top, there is a navigation bar with a menu icon, the Yavapai College logo, and a navigation bar with links: Shop, Approve (0), Receive, and Platform. Below this, there is a section titled "Go to: All Transactions | Non-Catalog Items | Standing Order". The main content area is divided into four categories: Office Supplies, Scientific, Information Technology, and Facilities. Each category contains a grid of supplier tiles, each with a "Punchout" button and the supplier's logo and name.

Category	Supplier	Logo
Office Supplies	STAPLES Business Advantage	Staples
	amazon business	Amazon
Scientific	McKesson	McKesson
	Pocket Nurse	Pocket Nurse
Information Technology	CDW	CDW
	Dell	Dell
	SHI International	SHI International
Facilities	Grainger	Grainger
	Hillyard, Inc.	Hillyard, Inc.
	Lowes PRO	Lowes

- Click the tile associated with the supplier you want to shop from (in this example – CDW). Once clicked you will be redirected to the CDW website as shown below.

cdwg.com/account/home

CDW-G What can we help you find today?

Notifications Yavapai College Cart

Hardware Software Solutions Services Industries Partners Insights Why CDW

YAVAPAI COLLEGE

Good Morning!

Account # 1093781 | [Take a Tour of Rubi](#)

Windows 10 Support Ended on 10/14/25

[View your personalized report](#)

Rubi

Orders View All Orders →

Year to Date

Search Orders 🔍 T1 Newest Density

ORDER #	PO #	PURCHASED	STATUS	PURCHASER	
1CJQ7M0	5405396...	02/03/2026	Not Yet Shipped	Its Operations	View Order
1CJPKQ2	1CJPKQ2	02/02/2026	All Items Shipped	Patrick Keeling	Track Order ***
1CJPBZD	1CJPBZD	01/28/2026	Some Items Shipped	William Earles	Track Order ***
1CJJBWL	1CJJBWL	01/01/2025	All Items Shipped	Patrick Keeling	Track Order ***

Order Management >

Saves & Favorites >

Asset Hub Beta >

Reports >

Client Services >

Account Settings >

YOUR ACCOUNT MANAGER • IN

Michael Smaniotto

michsma@cdwg.com

- Select Hardware, Software Solutions, Services, etc. at the top of the page based on the type of product or service you would like to purchase (in this example, Hardware, then Computer Accessories was selected). Add items you wish to purchase into your cart. You will notice that the items refer to the cooperative contract they are associated with (not all catalog suppliers do this, but CDW-G does).

(a) Shopping Cart and Checkout

- Once all items you wish to purchase are in your shopping cart (see below) click the “Checkout” button. Confirm the quantities and items are correct before you check out – changes cannot be made to the order (other than cancelling it) once this order is pushed through to ESM in the next step.

[Return To Home](#)
[Continue Shopping](#)

Shopping Cart

[Email Cart](#)

ADD ITEM TO CART

Enter CDW# or MFG#

Add

ITEM	AVAILABILITY	PRICE	QUANTITY	ITEM TOTAL
 Adesso 2.4GHz Wireless Ergonomic Touchpad Keyboard MFG Part: WKB-4500UB CDW Part: 4807302 UNSPSC: 43211706	In Stock Get it Fri, Feb 06 by a CDW partner	\$79.79 \$72.60 E&I CNR01439 Catalog	1	\$72.60
 3M Display Privacy Filter - 24.0", 16:9, TAA Compliant MFG Part: PF240W9B CDW Part: 4561998 UNSPSC: 43212001	In Stock Get it Thu, Feb 05 if ordered within 6 hrs 29 mins.	\$88.78 \$78.33 E&I CNR01439 Catalog	1	\$78.33
 Texas Instruments EZ SPOT Teacher Pack Graphing Calculator - Pack of 10 MFG Part: 84PL/TPK/1L1/J CDW Part: 5964354 UNSPSC: 44101800	In Stock Get it Fri, Feb 06 by a CDW partner	\$1,282.78 \$1,167.32 E&I CNR01439 Catalog	1	\$1,167.32
 Jabra GN1218 AC Attenuation - headset cable - 2 m MFG Part: 88011-102 CDW Part: 4848187 UNSPSC: 43101600	In Stock Get it Fri, Feb 06 by a CDW partner	\$39.89 \$35.90 MOHAVE 25E-CDWG-1004	1	\$35.90

Order Summary

Subtotal: **\$1,354.15**

Tax and Shipping calculated at checkout.

Lease Option Pricing

\$39.28 / Month

Checkout

Once you click checkout you will be redirected back to ESM where you will see the screen below.

(b) Item Summary

[training.esmsolutions.com/cart](#)

[MASTER CONTRAC...](#) [PCS Team Meeting...](#) [Amazon Business](#) [Amazon Business In...](#) [AP-MPDS-PCS Age...](#) [ASRS Main | Arizona...](#) [Athletics-PCS Agen...](#) [Aviation Attorney ~...](#) [Banner Admin](#) [Smartsheet - Banne...](#) [Business Services M...](#)

[Yavapai COLLEGE](#)

Hi Ed

Shop Approve (0) Receive Platform

Pending Transaction(s)

Go to: All Transactions | Non-Catalog Items | Standing Order

Cart 4
Total: 1,354.15 USD

Item Summary (4 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
 Adesso 2.4GHz Wireless Ergonomic Touchpad Keyboard By: CDWG Catalog Item #: 4807302 Mfg/Provider: Adesso	1	72.60 / EA	72.60
 3M Display Privacy Filter 24 0 16 9 TAA Compliant By: CDWG Catalog Item #: 4561998 Mfg/Provider: 3M Filters	1	78.33 / EA	78.33
 Texas Instruments EZ SPOT Teacher Pack Graphing Calculator Pack of 10 By: CDWG Catalog Item #: 5964354 Mfg/Provider: Texas Instruments	1	1,167.32 / EA	1,167.32
 Jabra GN1218 AC Attenuation headset cable 2 m By: CDWG Catalog Item #: 4848187	1	35.90 / EA	35.90

Cart Summary

Total Items in Cart:	4
Number of Suppliers:	1
Cart Total (USD):	1,354.15

CHECKOUT

- Click "Checkout" and a pop up window will ask you if you want to continue. Select "Yes"

Item Details	Quantity	Price (USD)	Subtotal (USD)
Adesso 2.4GHz Wireless Ergonomic Touchpad Keyboard By: CDWG Catalog Item #: 4807302 Mfg/Provider: Adesso	1	72.60 / EA	72.60
3M Display Privacy Filter 24.0 16.9 TAA Compliant By: CDWG Catalog Item #: 4561998 Mfg/Provider: 3M Filters	1	1,167.32 / EA	1,167.32
Texas Instruments EZ SPOT Teacher Pack Graphing Calculator Pack of 10 By: CDWG Catalog Item #: 5964354 Mfg/Provider: Texas Instruments	1	35.90 / EA	35.90
Jabra GN1218 AC Attenuation headset cable 2 m By: CDWG	1		

Checkout

The cart will be converted into 1 new transaction(s).
Do you want to continue?

Cart Summary

Total Items in Cart: 4
Number of Suppliers: 1
Cart Total (USD): 1,354.15

- Once you click “Yes” you will be brought to the same page as all other purchase transactions in ESM Purchase shown below.

(c) General Details

Hi Kelsey

[Shop](#) | [Manage \(5\)](#) | [Platform](#)

Pending Transaction(s)

Go to: [All Transactions](#) | [Non-Catalog Items](#) | [Standing Order](#)

Cart **0**
Total: 0.00 USD

Checkout

General Details

*** Payment Form:** ☐ Credit Card ☐ PO

Release Method: Electronic

Buyer: Not for Requestor Use

*** Need By Date:**

*** Commodity Code:** Select Commodity Code

*** Facilities?:** Select Facilities?

Purchase Order #: 973

*** Fiscal Date:** 09/22/2026 [reset](#)

Project Name:

Transaction Summary

Transaction #: 5174699
Purchase Order #: 973
Create Date: 09/22/2026
Supplier: CDW
Requester: Kelsey Ream
Selection: Active
Status: Unsubmitted Transaction
System Note: None

Total Line Items:	1
Subtotal:	1,989.01
Tax:	0.00
S & H:	0.00
Total Value (USD):	1,989.01

☒ [Order Release Details](#)

☒ [Delivery Details](#)

Attn : Kelsey Ream
Location : Prescott Campus

Transaction Name

09/22/2026 11:12-Ream-CDW

- Payment Form:** Select the appropriate payment form (Credit Card for all transactions that are less than \$10,000 (unless you are purchasing a capital asset, ie. A single item costing >\$5,000 including tax and shipping/freight). If the total order is over \$10,000, or there is a single item purchased that is over \$5,000 then select PO.
- Release Method:** “Electronic” if it is available. If not, leave it as “Manual”.
- Buyer:** Leave this field set to “Not for Requestor Use”.
- Fiscal Date:** Leave as today’s date UNLESS you are entering a requisition for the next fiscal year (ie. It’s May 20th 2026 and you are entering a requisition for next fiscal year, the 26/27 fiscal year). In this situation, you must change the Fiscal Date to 7/1/XXXX to ensure that the purchase comes out of the next fiscal year’s budget, rather than this year’s budget.
- Project Name:** Enter a brief description of the purpose of the project that will help you to identify the project later, should you need to search for the PO.

- **Need By Date:** Enter the date you expect the item to be delivered by. This date should be confirmed with the Supplier prior to entering the requisition. It should not be a guess.
- **Commodity Code:** This is a code for a broad category describing the type of goods/ services you are purchasing, for example “computer hardware”. Enter your best guess for the type of good/service you are purchasing (to search for it), then select the closest category. This is only used for metanalysis by Procurement staff so don’t stress too much about selecting the “perfect” category.
- **Facilities?:** Select “Yes” if the item takes up floor space, uses electrical power, needs to be hung on the wall, or is a vehicle, farm equipment, golf cart, ATV, etc. otherwise select “No.” Selecting Yes will route the purchase to the Facilities department for approval.
- **Receipt Required:** Check this box if the order contains any physical goods/items that will be delivered to a YC campus. If the order is only for services or software, leave this box unchecked.

Hi Kelsey ▾

Shop Manage (5) ▾ Platform
Pending Transaction(s)

Search Transaction # or Purchase Order #

Cart 0

Go to: All Transactions | Non-Catalog Items | Standing Order
Total: 0.00 USD

Checkout

General Details

Payment Form:
☐ Credit Card
☐ PO

Release Method:
Electronic ▾

Buyer:
Not for Requestor Use ▾

Purchase Order #:
973

Fiscal Date:
09/22/2026

reset

Project Name:

Need By Date:

Commodity Code:
Select Commodity Code ▾

Facilities?:
Select Facilities? ▾

Receipt Required:
☒

CONTINUE

Transaction Summary

Transaction #: 5174699
Purchase Order #: 973
Create Date: 09/22/2026
Supplier: CDW
Requester: Kelsey Ream
Selection: Active
Status: Unsubmitted Transaction
System Note: None
Total Line Items: 1
Subtotal: 1,989.01
Tax: 0.00
S & H: 0.00
Total Value (USD): 1,989.01

Transaction Name

09/22/2026 11:12-Ream-CDW

UPDATE

Order Release Details

Change

Delivery Details

Attn : Kelsey Ream Location : Prescott Campus

Change

When you’ve completed these fields, click the blue CONTINUE button in the lower right corner.

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(d) Delivery Details

Checkout

General Details

Order Release Details

Delivery Details

Ship To - Attn:

Kelsey Ream

Previously Used Locations:

Prescott Campus

1100 E. Sheldon Street

Receiving Department, Bldg. 7

Prescott, AZ 86301

9287762192

Default Address

Delivery Address

Chino Valley Center

2275 Old Home Manor Drive

Chino Valley, AZ 86323

9287762192

Set as Delivery Address

Search:

Type location name

CONTINUE

Transaction Summary

Transaction #: 5174699

Purchase Order #: 973

Create Date: 09/22/2026

Supplier: CDW

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 1,989.01

Tax: 0.00

S & H: 0.00

Total Value (USD): 1,989.01

Transaction Name

09/22/2026 11:12:Ream-CDW

UPDATE

Notes and Attachments

Internal Note

External Note

Billing Details

Attn : Accounts Payable

Location : Accounts Payable

Change

GL Details

Change

Line Item Details (Total: 1)

Change

- **Ship to – Attn:** Enter the name of the person who will inspect or oversee the purchase (typically the budget manager or someone in a similar role).
- **Previously Used Locations:** This will show all of the shipping locations that you have previously selected in prior requisitions. A blue triangle in the bottom left corner of the box will indicate the Delivery Address selected for this requisition. If it is not correct, click the correct “Set as Delivery Address” button in one of the other boxes. In the above example, the Prescott Campus is selected as the Delivery Address. If you wanted to change it to the Verde Valley Campus, you would click on the button to the left of “Set as Delivery Address”.
- Click on the blue CONTINUE button.

(e) Billing Details

- Billing Details will always be Accounts Payable 1100 E. Sheldon Street, so just click “CONTINUE” again.

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(f) GL Details

Checkout

General Details

Order Release Details

Delivery Details

Billing Details

GL Details

Account Code/Favorite

Select Account Code

+

Chart of Accounts: Y

Fund: Search/Select

Organization: Search/Select

Account: Search/Select

Program: Search/Select

Activity: Search/Select

APPLY

CANCEL

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Transaction Summary

Transaction #: 5174699

Purchase Order #: 973

Create Date: 09/22/2026

Supplier: CDW

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 1,989.01

Tax: 0.00

S & H: 0.00

Total Value (USD): 1,989.01

Transaction Name

09/22/2026 11:12-Ream-CDW

UPDATE

Notes and Attachments

Internal Note

External Note

Only use this section if you are using document level accounting, meaning that the total cost of the purchase will be applied to a single FOAP or will be split 50/50 between 2 FOAPs. If you are using commodity level accounting, meaning that each individual line item will be assigned a separate FOAP or FOAPs, skip this section and proceed to Line Item Details. To complete this section:

- Click the (+) to the right of the "Select Account Code" box to enter a new FOAP or click into the "Select Account Code" box to select from your previously used/ favorite FOAPs.
- To add a new FOAP, click in the box next to "Fund" and type the fund code (e.g., 0000) and hit enter (or click the fund in the blue pop up)
- Click in the box next to "Organization" and type the ORG code (e.g., 013301) and hit enter (or click the ORG in the blue pop up)
- Click in the box next to "Account" and type the Account code (e.g., 7101) and hit enter (or click the fund in the blue pop up)
- Click in the box next to "Program" and type the Program code (e.g., 30) and hit enter (or click the Program code in the blue pop up)
- If you have an Activity Code type it in the box next to "Activity" and hit enter or (or click the Activity code in the blue pop up)
- Click "Apply" after entering the FOAP information and go to the Line-Item Details Tab to confirm the items.
- If the purchase needs to be split between multiple FOAPs, click the (+) again to add a second FOAP. After filling in the Fund, Org, Account, Program, and clicking APPLY, you'll be able to split the \$ or %, as shown below.

GL Details						
Account Code/Favorite						
Select Account Code						
Item Split Details:						
NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.						
Chart	Index	Account Code	Description	USD Split	% Split	Action
Banner		111111-100-52345-50-6987-E1	General Fund - General - General Services - Student Services - Technology Services - Campus E	34999.3	70.00	
Banner		444444-500-72345-50-3987-C1	Construction Fund - Food Services - Technology - Student Services - Academic Administration - Campus C	14999.7	30.00	
Remaining:				0.00	0.00	

(g) Line Item Details

- **FOR CATALOG ORDERS: Do not change quantities here as it will not feed back into the catalog supplier's order. If you realize at this step that quantities need to be adjusted, you will need to delete the transaction (click the small blue trash can icon to the left of the Transaction Summary box) and restart from the Shop page.**
- If you did not enter a FOAP in the GL Details section because you are using commodity level accounting, click on the blue "more..." to the right of your first line item.

Checkout

General Details

Change

Order Release Details

Change

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: 1)

Item Details	* Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1 Apple iMac 24 M4 10 core 24 GB RAM 512 GB SSD Silver more... X Notes and Attachments: Internal Note External Note CONTINUE						

View Workflow Details

Change

SUBMIT

Transaction Summary

Transaction #: 5174699

Purchase Order #: 973

Create Date: 09/22/2026

Supplier: CDW

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 1,989.01

Tax: 0.00

S & H: 0.00

Total Value (USD): 1,989.01

Transaction Name

09/22/2026 11:12-Ream-CDW

UPDATE

Notes and Attachments

Internal Note

External Note

- In the pop-up, click on the GL Details tab. Here you can enter your FOAP(s) for this line item. Follow the steps described in Section 2(f) on the previous page to do so and click the blue UPDATE when to have finished entering the FOAP(s) for this line item and then the X in the upper right corner of the pop up to return to the Line Item Details Section.

Apple iMac 24 M4 10 core 24 GB ...

Supplier Name: CDW

MFG/Provider: Apple Desktop Systems

MFG/Provider Part #: MCR24LL/A

Catalog Item #: 8129624

Catalog Name: CDW (L1 API URL)

UPC:

CAS Number:

Supplier Contract Name:

Supplier Contract #:

1,989.01 USD / EA

Item Details

GL Details

* Ship To - Attn:

Kelsey Ream

* Need By Date:

10/31/2026

Contract Price:

1,989.01 / EA

* Commodity Code:

204 - Computer H... X

* Facilities?:

No X

* Qty:

1

Item Subtotal:

1,989.01

Tax:

0.00

S & H:

0.00

Item Total (USD):

1,989.01

Project Name:

UPDATE

- Repeat these steps for all line items.
- Once you have reviewed and confirmed that the items are correct and assigned FOAP(s) if you did not do so in the GL Details section, click CONTINUE.

(h) View Workflow Details

View Workflow Details		
Workflow Name	Approver Name	Status
Budget Manager Approval - 013301	Wendy Swartz	Pending
Facilities Approval	Karen Ramirez	Pending
Purchasing Approval	Charlotte Dunnigan	Pending
	OR Carl Stewart	Pending
	OR Kim DeJulio	Pending
	OR Kelsey Ream (Self Approval Limit)	Re-Routed

AD HOC REVIEW
REQUEST APPROVAL

- Review the Approvers listed in the Workflow details to make sure they make sense (Do the Budget Manager and/ or Dean/ Director seem appropriate to your knowledge? If not, email us at procurement@yc.edu or reach out to your Buyer).
- If you need to send the requisition to a person not in the Workflow Details routing listed, select “Ad Hoc Review” and use the drop-down menu to select their name. If their name is not listed, they are not an ESM user and they cannot be an Ad Hoc Reviewer until you request they be added for the next time (send requests to procurement@yc.edu).
- If you believe there is an error in the Workflow, send an email to procurement@yc.edu explaining the error and how you think it should be corrected.
- If you do not need to add an Ad Hoc Reviewer select “Request Approval”
- Once you request approval, the approver(s) whose status shows as “Active” is the person who currently has the requisition in their queue for approval.
- Once the Requisition is fully approved and the PO issued to the supplier, you will receive a notification that the PO has been sent to the supplier.

3. Non-Catalog Supplier Orders

Non-catalog orders should be created for one-time purchases of goods that need to be physically received on campus, services, or software from suppliers that are not listed as catalog suppliers. If you are not sure if your purchase should be a Non-catalog order or a standing order, reach out to your buyer at procurement@yc.edu for guidance.

Menu

Hi Kelsey
esm

Shop
Manage (4)
Platform

Go to: All Transactions
Non-Catalog Items
Standing Order

Cart 0
Total: 0.00 USD

Recently Requested Products

(a) Select Supplier

- After selecting “Non-Catalog Items”, search for your supplier in the box below “1. Select Supplier.”

Shop Manage (4) ▾ Platform

Go to: All Transactions | Non-Catalog Items | Standing Order

Cart 0

Total: 0.00 USD

New Non-Catalog Item

To add a non-catalog item you need to select the supplier first.

1. Select Supplier:

aardvark X 2 record(s) found

Supplier Name	GL Code	Address	Contact Name	Contact Email / PO Email	Contact Phone	Action
Aardvark Clay & Supplies	Y01614481	1400 E Pomona St, Santa Ana, CA, , United States	first last	contact@aardvarkclay.com	7145414157	SELECT
Aardvark Clay & Supplies	Y01614481	1400 E Pomona St, Santa Ana, CA, 92705, United States (default)	Miguel	miguel@aardvarkclay.com miguel@aardvarkclay.com	7145414157	SELECT

2

- You may see multiple listings for your desired supplier. Select the one whose address matches the one on your quote or other purchasing documentation. If you do not see a matching address, select any option to keep moving forward with the purchase but email procurement@yc.edu to notify your buyer the supplier's profile may need to be updated.



If the desired supplier is not found at all, users should contact Procurement@yc.edu

New Non-Catalog Item

To add a non-catalog item you need to select the supplier first.

✓ 1. Select Supplier: Aardvark Clay & Supplies

[Change](#)

2. Add Item

* Item/Service:

Example Item Description (include make, model, item number, and any relevant add-ons)

S&H field includes:

- Estimated Tax \$200.00
- Freight \$100.00

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

* UOM:

EA

* Qty:

1

List Price:

800

USD

S & H:

300.00

USD

[ADD TO CART](#)

- Next, the item details are entered.
- Fields marked with a red asterisk (*) are required. This process is repeated for each unique item and when all items have been entered, the **Add to Cart** button will move the line items to the system's Cart.
- UOM = Unit of measurement. This is either EA (Each, for physical items or licenses) or SVC (Service, for services).
- On the last line item, include Estimated Tax and any shipping/ handling/ freight charges in the **S & H** field.
 - Always estimate 10% tax
 - Include a written description of the breakdown of these costs in the **Item/ Service: Description** field, as shown in the example above.

(c) The Cart

- Click **"Add to Cart"** after completing each item. Continue adding as many items as necessary.
- Click on the **Cart** icon (top-right corner) to view all your items.

Yavapai COLLEGE

Hi Kelsey ▾ **esm**

Shop Manage (4) ▾ Platform

Go to: All Transactions | Non-Catalog Items | Standing Order

Cart 2
Total: 1,400.00 USD

Item Summary (2 Items)

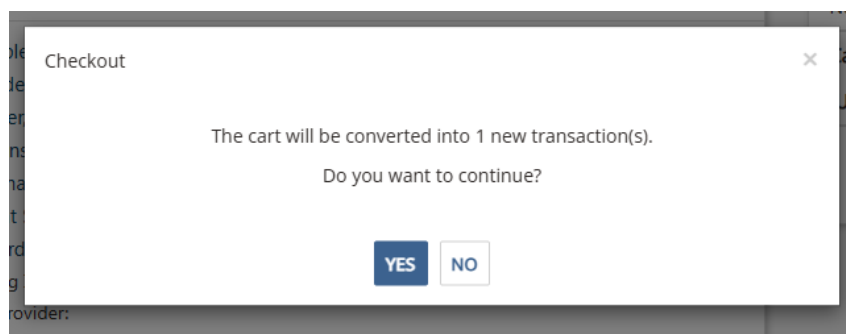
Item Details	Quantity	Price (USD)	Subtotal (USD)
Example Item Description (include make, model, item number, and any relevant add-ons) S&H field includes: - Estimated Tax \$200.00 - Freight \$100.00 By: Aardvark Clay & Supplies Catalog Item #: Mfg/Provider:	1	800.00 / EA	800.00 *
Example Item 2 By: Aardvark Clay & Supplies Catalog Item #: Mfg/Provider:	1	600.00 / EA	600.00 *

Cart Summary

Total Items in Cart:	2
Number of Suppliers:	1
Cart Total (USD):	1,400.00

CHECKOUT

- Confirm the items and quantities in your cart are correct before hitting **"Checkout"**.
- **Quantities, descriptions, and costs can be edited after the fact but it can be tricky to add additional items once you have "checked out". Double check you have added all items before checking out!**
- A pop up will ask you if you want to continue. Select **"Yes"**



(d) General Details

Checkout

General Details

Payment Form:

☐ Credit Card
 ☐ PO

Release Method:

Manual

Buyer:

Not for Requestor Use

Purchase Order #:

995

Fiscal Date:

09/25/2026

[reset](#)

Project Name:

Need By Date:

Commodity Code:

Select Commodity Code

?

Facilities?:

Select Facilities?

Receipt Required:

☒

CONTINUE

Order Release Details

Change

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: 2)

Change

View Workflow Details

Change

AD HOC REVIEW

SUBMIT

Transaction Summary

Transaction #:

5180708

Purchase Order #:

995

Create Date:

09/25/2026

Supplier:

Aardvark Clay & Supplies

Requester:

Kelsey Ream

Selection:

Active

Status:

Unsubmitted Transaction

System Note:

None

Total Line Items:

2

Subtotal:

1,400.00

Tax:

0.00

S & H:

300.00

Total Value (USD):

1,700.00

Transaction Name

09/25/2026 13:48-Ream-Aardvark Clay

UPDATE

Notes and Attachments

Internal Note

External Note

- **Payment Form:** Select the appropriate payment form (Credit Card for all transactions that are less than \$10,000 (unless you are purchasing a capital asset, ie. A single item costing >\$5,000 including tax and shipping/freight). If the total order is over \$10,000, or there is a single item purchased that is over \$5,000 then select PO.
- **Release Method:** "Electronic" if it is available. If not, leave it as "Manual".
- **Buyer:** Leave this field set to "Not for Requestor Use".
- **Fiscal Date:** Leave as today's date UNLESS you are entering a requisition for the next fiscal year (ie. It's May 20th 2026 and you are entering a requisition for next fiscal year, the 26/27 fiscal year). In this situation, you must change the Fiscal Date to 7/1/XXXX to ensure that the purchase comes out of the next fiscal year's budget, rather than this year's budget.
- **Project Name:** Enter a brief description of the purpose of the project that will help you to identify the project later, should you need to search for the PO.
- **Need By Date:** Enter the date you expect the item to be delivered by. This date should be confirmed with the Supplier prior to entering the requisition. It should not be a guess.
- **Commodity Code:** This is a code for a broad category describing the type of goods/ services you are purchasing, for example "computer hardware". Enter your best guess for the type of good/service you are purchasing (to search for it), then select the closest category. This is only used for metanalysis by Procurement staff so don't stress too much about selecting the "perfect" category.
- **Facilities?:** Select "Yes" if the item takes up floor space, uses electrical power, needs to be hung on the wall, or is a vehicle, farm equipment, golf cart, ATV, etc. otherwise select "No." Selecting Yes will route the purchase to the Facilities department for approval.
- **Receipt Required:** Check this box if the order contains any physical goods/items that will be delivered to a YC campus. If the order is only for services or software, leave this box unchecked.
- When you've completed these fields, click the blue CONTINUE button in the lower right corner.

Checkout

General Details

* Payment Form:

Credit Card

PO

Release Method:

Electronic

Buyer:

Not for Requestor Use

Purchase Order #:

995

* Fiscal Date:

09/25/2026

reset

Project Name:

Example Project Name

* Need By Date:

10/31/2026

* Commodity Code:

050 - Art Equipment and...

?

* Facilities?:

No

Receipt Required:

Transaction Summary

Transaction #:

5180708

Purchase Order #:

995

Create Date:

09/25/2026

Supplier:

Aardvark Clay & Supplies

Requester:

Kelsey Ream

Selection:

Active

Status:

Unsubmitted Transaction

System Note:

None

Total Line Items:

2

Subtotal:

1,400.00

Tax:

0.00

S & H:

300.00

Total Value (USD):

1,700.00

CONTINUE

Order Release Details

Change

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: 2)

Change

View Workflow Details

Change

Transaction Name

09/25/2026 13:48-Ream-Aardvark Clay & Supplies

UPDATE

Notes and Attachments

Internal Note

External Note

AD HOC REVIEW

SUBMIT

(e) Delivery Details

Checkout



General Details

Change

Order Release Details

Change

Delivery Details

• Ship To - Attn:

Kelsey Ream

Previously Used Locations:

 Prescott Campus

 1100 E. Sheldon Street
Receiving Department, Bldg. 7
Prescott, AZ 86301
 9287762192

 Default Address

 Delivery Address

 Chino Valley Center

 2275 Old Home Manor Drive
Chino Valley, AZ 86323
 9287762192

 Set as Delivery Address

Search:

Type location name

CONTINUE

Transaction Summary

Transaction #: 5180708

Purchase Order #: 995

Create Date: 09/25/2026

Supplier: Aardvark Clay & Supplies

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 2

Subtotal: 1,400.00

Tax: 0.00

S & H: 300.00

Total Value (USD): 1,700.00

Transaction Name

09/25/2026 13:48-Team-Aardvark Clay & S

UPDATE

Notes and Attachments

Internal Note

External Note

Billing Details

Attn : Accounts Payable

Location : Accounts Payable

Change

GL Details

Change

Line Item Details (Total: 2)

Change

View Workflow Details

Change

AD HOC REVIEW

SUBMIT

- **Ship to – Attn:** Enter the name of the person who will inspect or oversee the purchase (typically the budget manager or someone in a similar role).
- **Previously Used Locations:** This will show all of the shipping locations that you have previously selected in prior requisitions. A blue triangle in the bottom left corner of the box will indicate the Delivery Address selected for this requisition. If it is not correct, click the correct “Set as Delivery Address” button in one of the other boxes. In the above example, the Prescott Campus is selected as the Delivery Address. If you

wanted to change it to the Verde Valley Campus, you would click on the button to the left of “Set as Delivery Address”.

- Click on the blue CONTINUE button.

(f) Billing Details

- Billing Details will always be Accounts Payable 1100 E. Sheldon Street, so just click “CONTINUE” again.

(g) GL Details

GL Details

Account Code/Favorite

Select Account Code

+

* Chart of Accounts: Y

* Fund: Search/Select

* Organization: Search/Select

* Account: Search/Select

* Program: Search/Select

Activity: Search/Select

APPLY CANCEL

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
			Remaining:	1,400.00	100.00	

S & H Details

Chart	Index	Account Code	Description	USD Split	% Split
			Remaining:	300.00	100.00

CONTINUE

Status: Invalid Transaction

System Note: Alert

Total Line Items: 2

Subtotal: 1,400.00

Tax: 0.00

S & H: 300.00

Total Value (USD): 1,700.00

Transaction Name

09/25/2026 13:48-Ream-Aardvark C

UPDATE

Notes and Attachments

Internal Note

External Note

Only use this section if you are using document level accounting, meaning that the total cost of the purchase will be applied to a single FOAP or will be split 50/50 between 2 FOAPs. If you are using commodity level accounting, meaning that each individual line item will be assigned a separate FOAP or FOAPs, skip this section and proceed to Line Item Details. To complete this section:

- Click the (+) to the right of the “Select Account Code” box to enter a new FOAP or click into the “Select Account Code” box to select from your previously used/ favorite FOAPs.
- To add a new FOAP, click in the box next to “Fund” and type the fund code (e.g., 0000) and hit enter (or click the fund in the blue pop up)
- Click in the box next to “Organization” and type the ORG code (e.g., 013301) and hit enter (or click the ORG in the blue pop up)
- Click in the box next to “Account” and type the Account code (e.g., 7101) and hit enter (or click the fund in the blue pop up)
- Click in the box next to “Program” and type the Program code (e.g., 30) and hit enter (or click the Program code in the blue pop up)

- If you have an Activity Code type it in the box next to “Activity” and hit enter or (or click the Activity code in the blue pop up)
- Click “Apply” after entering the FOAP information and go to the Line-Item Details Tab to confirm the items.
- If the purchase needs to be split between multiple FOAPs, click the (+) again to add a second FOAP. After filling in the Fund, Org, Account, Program, and clicking APPLY, you’ll be able to split the \$ or %, as shown below.

GL Details

Account Code/Favorite

Select Account Code

+

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
Y		0000-013301-7101-30	Unrestricted Funds - General - Business Office - Supplies - General - Institutional Support	700	50	
Y		0000-013001-7001-30	Unrestricted Funds - General - VP, Finance and Admin Services - Legal Services - Institutional Support	700	50	
Remaining:				0.00	0.00	

S & H Details

Chart	Index	Account Code	Description	USD Split	% Split
Y		0000-013301-7101-30	Unrestricted Funds - General - Business Office - Supplies - General - Institutional Support	150	50
Y		0000-013001-7001-30	Unrestricted Funds - General - VP, Finance and Admin Services - Legal Services - Institutional Support	150	50
Remaining:				0.00	0.00

CONTINUE

Selection: Active

Status: Invalid Transaction

System Note: Alert

Total Line Items: 2

Subtotal: 1,400.00

Tax: 0.00

S & H: 300.00

Total Value (USD): 1,700.00

Transaction Name

09/25/2026 13:48-Ream-Aardvark C

UPDATE

Notes and Attachments

Internal Note

External Note

2

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(h) Line Item Details

Line Item Details (Total: 2)

Item Details	Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1 NON CATALOG Example Item Description (include make, model, item number, and any relevant add-ons) S&H field includes: - Estimated Tax \$200.00 - Freight \$100.00 edit	1	800.00 / EA	800.00	0.00	300.00	1,100.00
2 NON CATALOG Example Item 2 edit	1	600.00 / EA	600.00	0.00	0.00	600.00

Notes and Attachments:

Internal Note

External Note

CONTINUE

View Workflow Details

Change

SUBMIT

System Note: History

Total Line Items: 2

Subtotal: 1,400.00

Tax: 0.00

S & H: 300.00

Total Value (USD): 1,700.00

Transaction Name

09/25/2026 13:48-Ream-Aardvark C

UPDATE

Notes and Attachments

Internal Note

External Note

- These are the line items created earlier in the process.
- You can modify any line item by clicking “edit” under the item description (allows you to edit item descriptions, quantities, costs) “more...” (edit the FOAP for this line item only), or the small red X next to the “more ...” (delete the line item), then click UPDATE once you’ve made any necessary changes.
- **If you did not enter a FOAP in the GL Details section because you are using commodity level accounting, you must add a FOAP to each line item in this step. Click on the blue “more...” to the right of your first line item.**

Example Item Description (include make, ...)

NON CATALOG

Supplier Name: Aardvark Clay & Supplies

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

Catalog Name:

UPC:

CAS Number:

Supplier Contract Name:

Supplier Contract #:

800.00 USD / EA

Item Details

GL Details

Ship To - Attn: Kelsey Ream

Need By Date: 10/31/2026

Contract Price: 800.00 / EA

Commodity Code: 050 - Art Equipment an...

Facilities?: No

Qty: 1

Project Name: Example Project Name

Item Subtotal: 800.00

Tax: 0.00

S & H: 300.00

Item Total (USD): 1,100.00

UPDATE

- In the pop-up, click on the GL Details tab. Here you can enter your FOAP(s) for this line item. Follow the steps described in Section 2(f) on the previous page to do so and click the blue UPDATE when to have finished entering the FOAP(s) for this line item and then the X in the upper right corner of the pop up to return to the Line Item Details Section.
- Click on the blue CONTINUE button to move to the final section.

(i) Attaching a Quote, Order Form, Proposal or Other Related Documents to a Requisition

- In the bottom-right corner of the screen, you'll see both an Internal and an External Notes and Attachments section. Click the button with the 3 lines to add a note or the button with the paperclip to add an attachment.
 - **Internal Note:** Visible only to the liaison, approvers, and Procurement. Use this provide supplier contact details (name, email address for purchase orders to be sent to, and phone #) or other important notes for Procurement.
 - **Internal Attachment:** Attach any internal-only documents related to the requisition.
 - **External Note:** Include the quote or estimate number, cooperative contract information, and any other information related to the purchase that the Supplier should see.
 - **External Attachment:** Upload the quote/order form/ proposal or other related documents here. Copies of any documents attached here will be sent to the supplier.

(j) View Workflow Details

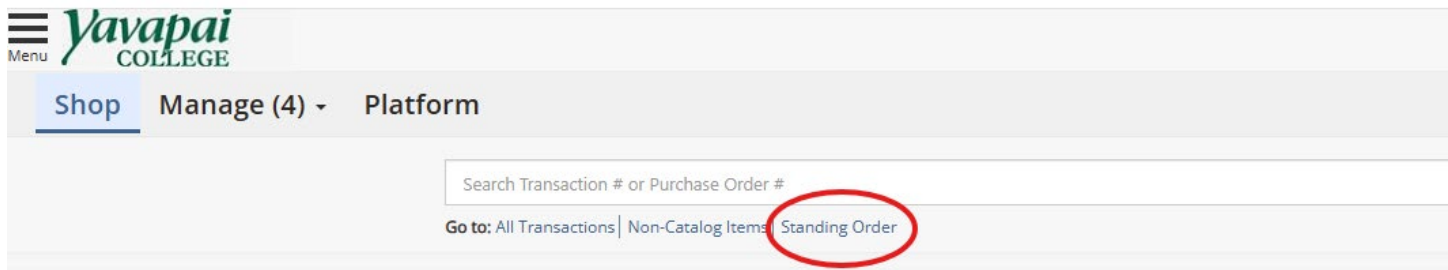
View Workflow Details		
Workflow Name	Approver Name	Status
Budget Manager Approval - 013301	Wendy Swartz	Pending
Facilities Approval	Karen Ramirez	Pending
Purchasing Approval	Charlotte Dunnigan	Pending
	OR Carl Stewart	Pending
	OR Kim DeJulio	Pending
	OR Kelsey-Ream (Self Approval Limit)	Re-Routed

AD HOC REVIEW
REQUEST APPROVAL

- Review the Approvers listed in the Workflow details to make sure they make sense (Do the Budget Manager and/ or Dean/ Director seem appropriate to your knowledge? If not, email us at procurement@yc.edu or reach out to your Buyer).
- If you need to send the requisition to a person not in the Workflow Details routing listed, select “Ad Hoc Review” and use the drop-down menu to select their name. If their name is not listed, they are not an ESM user and they cannot be an Ad Hoc Reviewer until you request they be added for the next time (send requests to procurement@yc.edu).
- If you believe there is an error in the Workflow, send an email to procurement@yc.edu explaining the error and how you think it should be corrected.
- If you do not need to add an Ad Hoc Reviewer select “Request Approval”
- Once you request approval, the approver(s) whose status shows as “Active” is the person who currently has the requisition in their queue for approval.

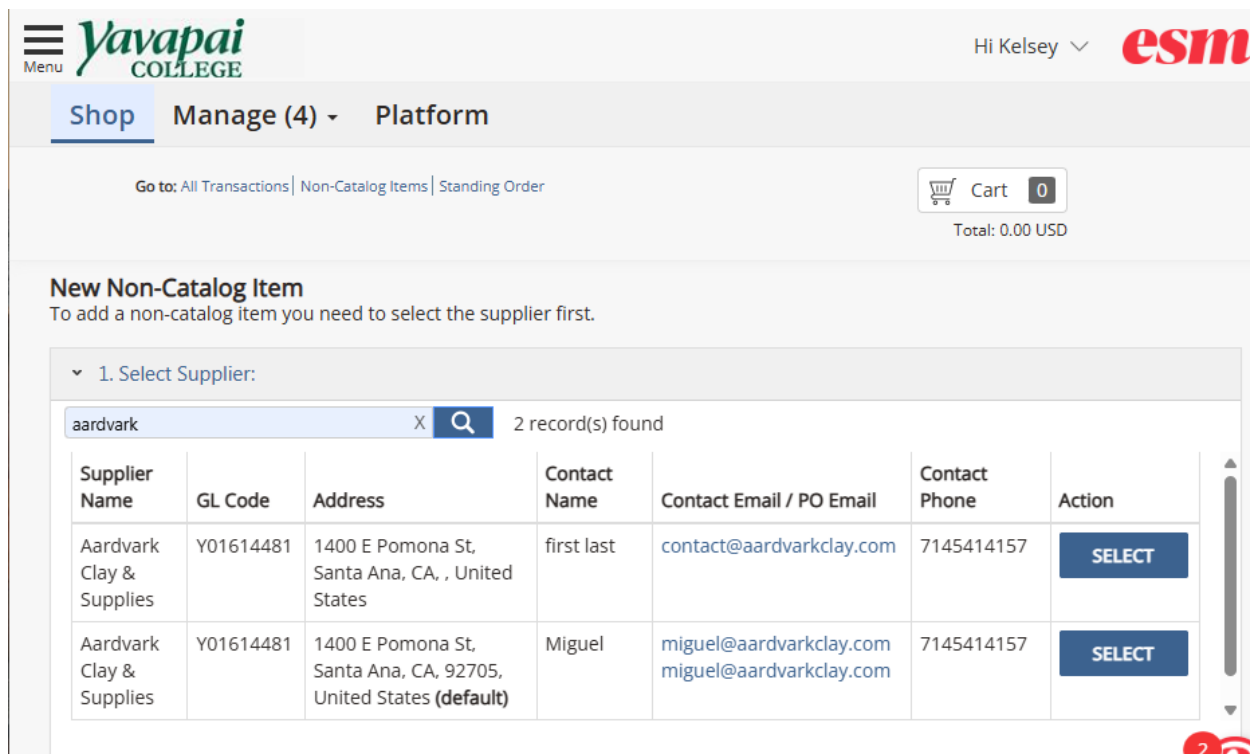
4. Standing Orders

Standing Orders should be created on an annual (fiscal year) basis for non-catalog suppliers with whom a department will make many purchases of consumable supplies or ongoing services throughout the fiscal year. Standing orders should be created at the beginning of the fiscal year for a total of your estimated spend throughout the fiscal year. If you are not sure if your purchase should be a Non-catalog order or a standing order, reach out to your buyer at procurement@yc.edu for guidance.



(a) Select Supplier

- After selecting "Non-Catalog Items", search for your supplier in the box below "1. Select Supplier."



- You may see multiple listings for your desired supplier. Select the one whose address matches the one on your quote or other purchasing documentation. If you do not see a matching address, select any option to keep moving forward with the purchase but email procurement@yc.edu to notify your buyer the supplier's profile may need to be updated.

If the desired supplier is not found at all, users should contact Procurement@yc.edu

(b) Add Item(s)

Shop
Manage (4)
Platform

Go to: All Transactions | Non-Catalog Items | Standing Order

Cart 0
Total: 0.00 USD

New Standing Order

To add a Standing Order you need to select the supplier first.

1. Select Supplier: **Aardvark Clay & Supplies**

2. Add Item

Item/Service:
Clay FY26/27

UOM:
EA

Qty:
1

List Price:
10000
USD

S & H:
USD

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

ADD TO CART

- In a standing order, individual lines need not be created for each line item you anticipate purchasing. Typically only one line is needed as the standing order represents a lump sum that your department anticipates spending with the selected supplier over the course of the fiscal year, as shown in the example above.
- UOM = Unit of measurement. This is either EA (Each, for physical items or licenses) or SVC (Service, for services).
- For a Standing Order, the list price on your line item should be the “lump sum” described above.

(c) The Cart

- Click **“Add to Cart”** after completing each item. Continue adding as many items as necessary.
- Click on the **Cart** icon (top-right corner) to view all your items.

Shop
Manage (3)
Platform

Go to: All Transactions | Non-Catalog Items | Standing Order

Cart 1
Total: 10,000.00 USD

Item Summary (1 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
NON CATALOG Clay FY26/27 By: Aardvark Clay & Supplies Catalog Item #: Mfg/Provider:	1	10,000.00 / EA	10,000.00

Cart Summary

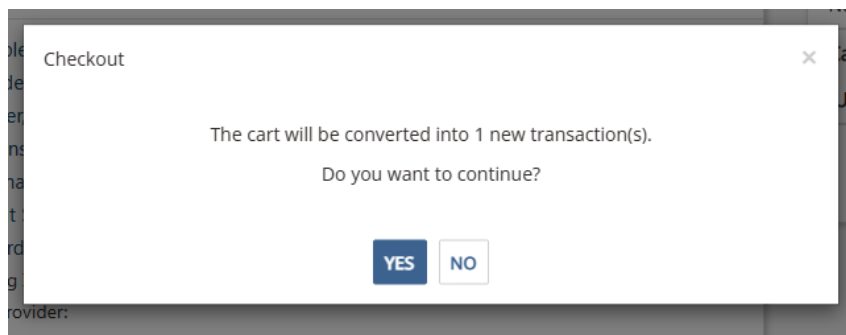
Total Items in Cart: 1
Number of: 1
Suppliers:

Cart Total 10,000.00 (USD):

CHECKOUT

2

- Confirm the items and quantities in your cart are correct before hitting “Checkout”.
- **Quantities, descriptions, and costs can be edited after the fact but it can be tricky to add additional items once you have “checked out”. Double check you have added all items before checking out!**
- A pop up will ask you if you want to continue. Select “Yes”



(d) General Details

Checkout

General Details

* Payment Form:

☐ Credit Card
 ☐ PO

* Need By Date:

Release Method:

Manual

* Commodity Code:

Select Commodity Code

Buyer:

Not for Requestor Use

* Facilities?:

Select Facilities?

Purchase Order #:

1027

* Standing Order Start Date:

* Fiscal Date:

09/30/2026

reset

Standing Order End Date:

Project Name:

CONTINUE

Transaction Summary

Transaction #:

5186683

Purchase Order #:

1027

Create Date:

09/30/2026

Supplier:

Aardvark Clay & Supplies

Requester:

Kelsey Ream

Selection:

Active

Status:

Unsubmitted Transaction

System Note:

None

Total Line Items:

1

Subtotal:

10,000.00

Tax:

0.00

S & H:

0.00

Total Value (USD):

10,000.00

Transaction Name

09/30/2026 14:46-Ream-Aardvark

UPDATE

Order Release Details

Change

Delivery Details

Attn : Kelsey Ream

Location : Prescott Campus

Change

Billing Details

Attn : Accounts Payable

Location : Accounts Payable

Change

- **Payment Form:** This should always be PO for a Standing Order.
- **Release Method:** “Electronic” if it is available. If not, leave it as “Manual”.
- **Buyer:** Leave this field set to “Not for Requestor Use”.
- **Fiscal Date:** Leave as today’s date UNLESS you are entering a requisition for the next fiscal year (ie. It’s May 20th 2026 and you are entering a requisition for next fiscal year, the 26/27 fiscal year). In this situation, you must change the Fiscal Date to 7/1/XXXX to ensure that the purchase comes out of the next fiscal year’s budget, rather than this year’s budget.
- **Project Name:** Enter a brief description of the purpose of the project that will help you to identify the project later, should you need to search for the PO.
- **Need By Date:** For a Standing Order this should be the last day of the fiscal year or the last day of the term of the Standing Order.
- **Commodity Code:** This is a code for a broad category describing the type of goods/ services you are purchasing, for example “computer hardware”. Enter your best guess for the type of good/service you are purchasing (to search for it), then select the closest category. This is only used for metanalysis by Procurement staff so don’t stress too much about selecting the “perfect” category.
- **Facilities?:** Select “Yes” if the item takes up floor space, uses electrical power, needs to be hung on the wall, or is a vehicle, farm equipment, golf cart, ATV, etc. otherwise select “No.” Selecting Yes will route the purchase to the Facilities department for approval. (For a Standing Order, this should almost always be “No”).
- **Standing Order Start/ End Date:** Typically the first and last day of the fiscal year. _____

- When you've completed these fields, click the blue CONTINUE button in the lower right corner.

(e) Delivery Details

Checkout

General Details

Order Release Details

Delivery Details

Ship To - Attn:

Kelsey Ream

Previously Used Locations:

Prescott Campus

1100 E. Sheldon Street

Receiving Department, Bldg. 7

Prescott, AZ 86301

9287762192

Default Address

Delivery Address

Chino Valley Center

2275 Old Home Manor Drive

Chino Valley, AZ 86323

9287762192

Set as Delivery Address

Search:

Type location name

CONTINUE

Transaction Summary

Transaction #: 5186683

Purchase Order #: 1027

Create Date: 09/30/2026

Supplier: Aardvark Clay & Supplies

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 10,000.00

Tax: 0.00

S & H: 0.00

Total Value (USD): 10,000.00

Transaction Name

09/30/2026 14:46-Ream-Aardvark

UPDATE

- Ship to – Attn:** Enter the name of the person who will inspect or oversee the purchase (typically the budget manager or someone in a similar role).
- Previously Used Locations:** This will show all of the shipping locations that you have previously selected in prior requisitions. A blue triangle in the bottom left corner of the box will indicate the Delivery Address selected for this requisition. If it is not correct, click the correct “Set as Delivery Address” button in one of the other boxes. In the above example, the Prescott Campus is selected as the Delivery Address. If you wanted to change it to the Verde Valley Campus, you would click on the button to the left of “Set as Delivery Address”.
- Click on the blue CONTINUE button.

(f) Billing Details

- Billing Details will always be Accounts Payable 1100 E. Sheldon Street, so just click “CONTINUE” again.

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(g) GL Details

Checkout

General Details

Order Release Details

Delivery Details

Billing Details

GL Details

Account Code/Favorite

Select Account Code

+

* Chart of Accounts: Y

* Fund: Search/Select

* Organization: Search/Select

* Account: Search/Select

* Program: Search/Select

Activity: Search/Select

APPLY CANCEL

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
			Remaining:	10,000.00	100.00	

Transaction Summary

Transaction #: 5186683

Purchase Order #: 1027

Create Date: 09/30/2026

Supplier: Aardvark Clay & Supplies

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 10,000.00

Tax: 0.00

S & H: 0.00

Total Value (USD): 10,000.00

Transaction Name

09/30/2026 14:46-Ream-Aardvark Cla

UPDATE

Notes and Attachments

Internal Note

External Note

- Only use this section if you are using document level accounting, meaning that the total cost of the purchase will be applied to a single FOAP or will be split 50/50 between 2 FOAPs. If you are using commodity level accounting, meaning that each individual line item will be assigned a separate FOAP or FOAPs, skip this section and proceed to Line Item Details. To complete this section:
- Click the (+) to the right of the "Select Account Code" box to enter a new FOAP or click into the "Select Account Code" box to select from your previously used/ favorite FOAPs.
- To add a new FOAP, click in the box next to "Fund" and type the fund code (e.g., 0000) and hit enter (or click the fund in the blue pop up)
- Click in the box next to "Organization" and type the ORG code (e.g., 013301) and hit enter (or click the ORG in the blue pop up)
- Click in the box next to "Account" and type the Account code (e.g., 7101) and hit enter (or click the fund in the blue pop up)
- Click in the box next to "Program" and type the Program code (e.g., 30) and hit enter (or click the Program code in the blue pop up)
- If you have an Activity Code type it in the box next to "Activity" and hit enter or (or click the Activity code in the blue pop up)
- Click "Apply" after entering the FOAP information and go to the Line-Item Details Tab to confirm the items.
- If the purchase needs to be split between multiple FOAPs, click the (+) again to add a second FOAP. After filling in the Fund, Org, Account, Program, and clicking APPLY, you'll be able to split the \$ or %, as shown below.

GL Details

Account Code/Favorite

Select Account Code

+

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
Y		0000-013301-7101-30	Unrestricted Funds - General - Business Office - Supplies - General - Institutional Support	5000	50	
Y		0000-013001-7001-30	Unrestricted Funds - General - VP, Finance and Admin Services - Legal Services - Institutional Support	5000	50	
Remaining:				0.00	0.00	

CONTINUE

Selection: ACTIVE

Status: Pending Valid

System Note: None

Total Line Items:

Subtotal:

Tax:

S & H:

Total Value (USD):

Transaction Name

09/30/2026 14:46-Ream

UPDATE

Notes and Attachments

Internal Note

External Note

(h) Line Item Details

Checkout

General Details [Change](#)

Order Release Details [Change](#)

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: 1)

Item Details	* Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1 Clay FY26/27 edit	1	10,000.00 / EA	10,000.00	0.00	0.00	10,000.00 more...

Notes and Attachments:

Internal Note

External Note

CONTINUE

Transaction Summary

Transaction #: 5186683

Purchase Order #: 1027

Create Date: 09/30/2026

Supplier: Aardvark Clay & Supplies

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items: 1

Subtotal: 10,000.00

Tax: 0.00

S & H: 0.00

Total Value (USD): 10,000.00

Transaction Name

09/30/2026 14:46-Ream-Aardvark Cla

UPDATE

- These are the line items created earlier in the process.
- You can modify any line item by clicking “edit” under the item description (allows you to edit item descriptions, quantities, costs) “more...” (edit the FOAP for this line item only), or the small red X next to the “more ...” (delete the line item), then click UPDATE once you’ve made any necessary changes.
- **If you did not enter a FOAP in the GL Details section because you are using commodity level accounting (unusual for a standing order, usually not necessary unless you have more than one line item), you must add a FOAP to each line item in this step. Click on the blue “more...” to the right of your first line item.**

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NON CATALOG

Supplier Name: Aardvark Clay & Supplies

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

Catalog Name:

Supplier Contract Name:

Supplier Contract #:

10,000.00 USD / EA

Item Details

GL Details

* Ship To - Attn: Kelsey Ream

* Commodity Code: 050 - Art Equipment and Supplies

Project Name: Clay for Art Department

* Need By Date: 06/30/2027

* Facilities?: No

Contract Price: 10,000.00 / EA

* Qty: 1

Item Subtotal:	10,000.00
Tax:	0.00
S & H:	0.00
Item Total (USD):	10,000.00

[UPDATE](#)

- In the pop-up, click on the GL Details tab. Here you can enter your FOAP for this line item. Follow the steps described in Section 2(f) on the previous page to do so and click the blue UPDATE when you have finished entering the FOAP for this line item and then the X in the upper right corner of the pop up to return to the Line Item Details Section.
- Click on the blue CONTINUE button to move to the next section.

(i) Notifications

Notifications can be set up so that the requestor receives a notification from ESM when the Standing Order when standing order reaches a set \$ threshold or a set date threshold. This helps the requestor by sending a reminder when the Standing Order is running out of funds or close to expiring, and is optional.

Checkout

✓
General Details
[Change](#)

✓
Order Release Details !
[Change](#)

✓

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: 1)
[Change](#)

+
Add Notification

No Notifications exist

[CONTINUE](#)

Transaction Summary

Transaction #: 5186683

Purchase Order #: 1027

Create Date: 09/30/2026

Supplier: Aardvark Clay & Supplies

Requester: Kelsey Ream

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items:	1
Subtotal:	10,000.00
Tax:	0.00
S & H:	0.00
Total Value (USD):	10,000.00

Transaction Name

- To add a notification, click **Add Notification**.

Add/Edit Notification

* Type: Select Type

Select Type

Expiration Date

Order Value

- Select the notification type (requestor can create as many as desired):
 - Expiration Date = ESM will notify the requestor a set number of days prior to the Expiration Date set in the General Details section.

Add/Edit Notification

* Type: Expiration Date

* Days in advance: 60

Next Notification: 05/01/2027

* Users to Notify: 1. Kelsey Ream (kelsey.ream@yc.edu) ✖

UPDATE

Search: Enter email address or first name or last name Q

User:

- Order Value = ESM will notify the requestor when the PO total reaches a set \$ threshold or percentage of the total PO value remaining.

Add/Edit Notification

* Type: Order Value

* Basis: Amount Remaining = 3000

* Users to Notify: 1. Kelsey Ream (kelsey.ream@yc.edu) ✖

UPDATE

Search: Enter email address or first name or last name Q

User:

- Click UPDATE when the notification has been created. Notifications created will now display in this section.

Notifications

+

Add Notification

Type	Criteria	Next Notification	Notify Users	Delete
Expiration Date	60 Days	05/01/2027	Kelsey Ream (kelsey.ream@yc.edu)	✖ edit
Order Value	Amount Remaining = 3,000.00		Kelsey Ream (kelsey.ream@yc.edu)	✖ edit

CONTINUE

(j) Attaching a Quote, Order Form, Proposal, or Other Related Documents to the Requisition

Notes and Attachments

Internal Note

External Note

Powered By:

?

- In the bottom-right corner of the screen, you'll see both an Internal and an External Notes and Attachments section. Click the button with the 3 lines to add a note or the button with the paperclip to add an attachment.
 - Internal Note:** Visible only to the liaison, approvers, and Procurement. Use this provide supplier contact details (name, email address for purchase orders to be sent to, and phone #) or other important notes for Procurement.
 - Internal Attachment:** Attach any internal-only documents related to the requisition.
 - External Note:** Include the quote or estimate number, cooperative contract information, and any other information related to the purchase that the Supplier should see. Standing Orders should always include the following clause:

Standing Order for FY 2_/2_

Cost *[brief description of goods/ services being purchased]* as needed, NOT TO EXCEED amount on order including, tax, shipping, and all costs from July 1, 202_ – June 30, 202_. Expenditures above the PO amount are not authorized.

- External Attachment:** Upload the quote/order form/ proposal or other related documents here. Copies of any documents attached here will be sent to the supplier.

(k) View Workflow Details

View Workflow Details

Workflow Name	Approver Name	Status
Budget Manager Approval - 013301	Wendy Swartz	Pending
Facilities Approval	Karen Ramirez	Pending
Purchasing Approval	Charlotte Dunnigan	Pending
	OR Carl Stewart	Pending
	OR Kim DeJulio	Pending
	OR Kelsey Ream (Self Approval Limit)	Re-Routed

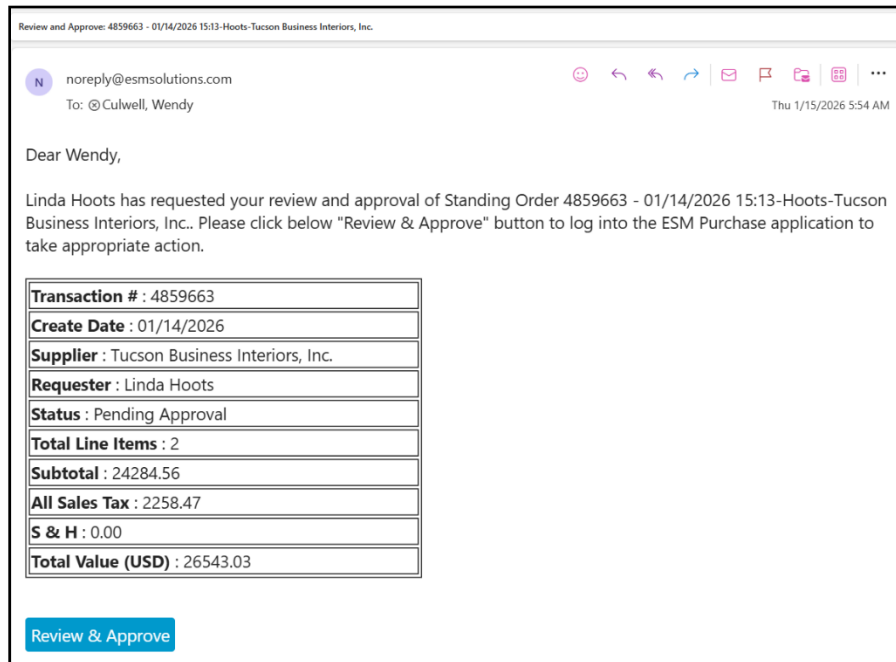
AD HOC REVIEW

REQUEST APPROVAL

- Review the Approvers listed in the Workflow details to make sure they make sense (Do the Budget Manager and/ or Dean/ Director seem appropriate to your knowledge? If not, email us at procurement@yc.edu or reach out to your Buyer).
- If you need to send the requisition to a person not in the Workflow Details routing listed, select “Ad Hoc Review” and use the drop-down menu to select their name. If their name is not listed, they are not an ESM user and they cannot be an Ad Hoc Reviewer until you request they be added for the next time (send requests to procurement@yc.edu).
- If you believe there is an error in the Workflow, send an email to procurement@yc.edu explaining the error and how you think it should be corrected.
- If you do not need to add an Ad Hoc Reviewer select “Request Approval”
- Once you request approval, the approver(s) whose status shows as “Active” is the person who currently has the requisition in their queue for approval.

5. Tracking the Approval Status of a Transaction/Requisition

After submitting the requisition, the approvers in the workflow will receive a notification from noreply@esmsolutions.com that looks like this:



Approvers can either approve the requisition through this email or by logging into ESM directly and viewing the approve tab.

(a) Approving from an Email Notification

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:

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.

(b) Approving from the Main ESM Homepage

Navigate to ESM from the myYC Homepage, as explained in Section 1. 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.**

Receive Platform

Search Transaction # or Purchase Order #

Transaction Name: Search Transaction Name

Supplier: Search Supplier Name

Transaction Type: All

Select Requester

Requester:

Selection: All

Status: All

Date Range: Last 7 days

Sort By: Create Date

APPLY CLEAR ALL

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.**

Yavapai College

Shop Approve (3) - Receive Platform

Search Transaction # or Purchase Order #

Go to: All Transactions | Non-Catalog Items | Standing Order | Continue Shopping

Approval Transactions (Total 1)

Transaction #	Total Line Items	Total Value	Create Date	Order Type
05/05/2026 12:13-Ream-Ellucian Company LLC Transaction #: 273189	6	44,824.52 USD	05/05/2026	Standard

Supplier: Ellucian Company LLC

Requester: Kelsey Ream

Approve Arrival Date: 05/05/2026

PENDING APPROVAL

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.

Yavapai College

Shop Approve (3) - Receive Platform

Search Transaction # or Purchase Order #

Go to: All Transactions | Non-Catalog Items | Standing Order

Approve

General Details

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

Receipt Required: ☒

CONTINUE

Order Release Details

Delivery Details

Billing Details

GL Details

Line Item Details (Total 6)

View Workflow Details

APPROVE REJECT AD HOC REVIEW

Transaction Summary

Transaction #: 273189

Purchase Order #: 257

Create Date: 05/05/2026

Supplier: Ellucian 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

Total Value (USD): 44,824.52

Transaction Name

05/05/2026 12:13-Ream-Ellucian Company LLC

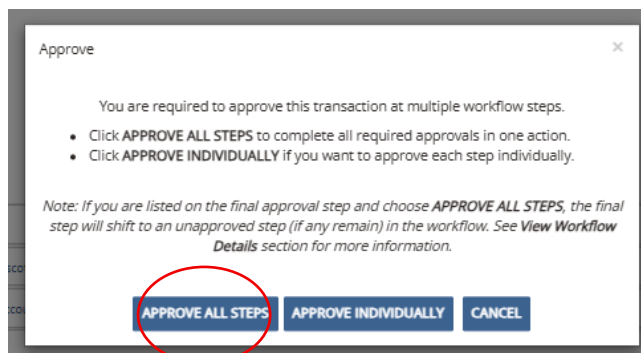
Notes and Attachments

Internal Note

External Note

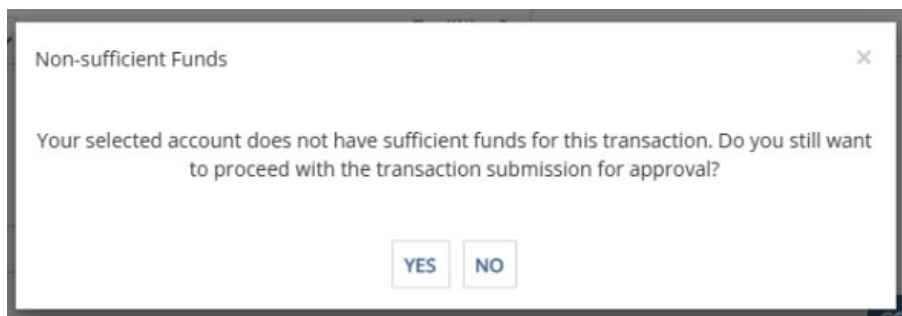
(c) Approve All Steps

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.



(d) Non-Sufficient Funds

After clicking APPROVE, 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.



6. Miscellaneous Options

The Checkout page provides the following miscellaneous options for all transactions / orders.

Option	Description
(Print)	The Print option will open the full order information in a display mode. The full display mode also offers the ability to open, save and/or print a PDF version of the order information from the (Print) icon.
(Archive)	The Archive option will move the entire transaction/order to an archived state. Once archived, the transaction/order can be viewed, but cannot be modified, processed or copied.
(Delete)	The delete option is only available for transactions not submitted to the supplier and will delete the entire transaction. Once deleted, the transaction cannot be viewed, modified, processed or copied, although it can be reported on from the Reporting tool .
(Hold)	The hold option is only available for transactions not submitted to the supplier and will move the entire transaction to a hold status, which will allow it to be viewed, modified, and processed.
(Copy)	The copy option is only available for orders that have been submitted to the supplier and will copy the order information to a new transaction based on the Transaction Copy settings configured by the system administrator.
(View)	The View option is only available for orders that have been submitted to the supplier and will open the full order information in a display mode in a PO format. The PO format display mode also offers the ability to open, save and/or print a PDF version of the order information from the (Print) icon.

7. Transaction Summary

The Transaction Summary section provides basic transaction / order information, which users cannot edit directly, but will be updated automatically based on transaction / order changes made in other Checkout page sections. The supplier field link provides additional supplier information when selected. This information must be reviewed for accuracy prior to submitting transactions for approval and releasing orders to suppliers.

Transaction Summary	
Transaction #:	4891859
Purchase Order #:	53
Create Date:	02/09/2026
Supplier:	Aardvark Clay & Supplies
Requester:	Kelsey Ream
Selection:	Active
Status:	Unsubmitted Transaction
System Note:	None
Total Line Items:	1
Subtotal:	1.00
Tax:	0.00
S & H:	0.00
Total Value (USD):	1.00

IV. Viewing Your Requisitions/ Transactions

1. Overview

The All Transactions page serves as a tracking tool for users to review and edit (when applicable) any of their own transactions / orders at any stage of the process, which is accessible from the **All Transactions** link in the navigation area.



Users setup with the **Transfer Cart** system privilege will not have access to the **All Transactions** page and cannot track their transferred orders. Refer to the [System Permissions](#) section above for more information.

Transactions / orders are organized based on the user-selected options in the **Filter / Search Tools** detailed below and are opened by selecting the transaction name link.

All Transactions (Total 72)		Filter / Search Tools	
Filter By: All	Showing: All	Sort By: Recently Added	Search Transaction# or PO# Clear All
08/12/2017-16:41-Kravitz-Central ... Transaction #: 77405	Total Line Items: 3 PO #: 1414	Total Value: 9,012.64 USD Supplier: Central Office Supply	Create Date: 8/12/2017 Requester: Gladys Kravitz Pending Approval
08/12/2017-16:41-Kravitz-ESM So... Transaction #: 77406	Total Line Items: 1 PO #: 1415	Total Value: 200.00 USD Supplier: ESM Solutions	Create Date: 8/12/2017 Requester: Gladys Kravitz Unsubmitted Transaction
08/06/2017-16:21-Kravitz-Central ... Transaction #: 76615	Total Line Items: 3 PO #: 1400	Total Value: 34,349.47 USD Supplier: Central Office Supply	Create Date: 8/6/2017 Requester: Gladys Kravitz Submitted to Supplier
08/09/2017-21:27-Kravitz-Grainger Transaction #: 77129	Total Line Items: 1 PO #: 1404	Total Value: 204.18 USD Supplier: Grainger	Create Date: 8/9/2017 Requester: Gladys Kravitz Unsubmitted Change Order

Opening a transaction / order displays the **Checkout** page options detailed in the [Checkout Page](#) section above.

2. Filter / Search Tools

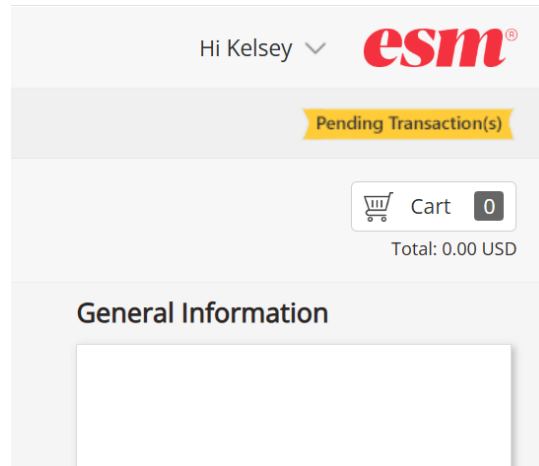
The following is detailed information regarding the search and filter tools for the All Transactions page.

Field Name	Description
Filter By	This field can be used to filter the list of transactions / orders that appear on the Checkout page, based on order status or the value of the Selection field in the order header detail section of orders. Selection options include: • Active – Unsubmitted transactions actively awaiting the user to release to the supplier or submit for approval. • Waiting – Submitted transactions awaiting approval. • Hold – Transactions placed in a Hold status by the user, an approver or an administrator/manager. • Archive – Transactions placed in an Archived status by the user, an approver or an administrator/manager. • Submitted – Orders submitted / released to the supplier. • Received – Orders submitted / released to the supplier and partially / fully received. • All – All transactions / orders created by the user.
Showing	This field can be used to filter the list of transactions / orders that appear on the Checkout page, based on time frame. Selection options include: • Last 7 days – All transactions / orders created by the user in the last 7 days. • Last 30 days – All transactions / orders created by the user in the last 30 days. • Last 60 days – All transactions / orders created by the user in the last 60 days. • Last 90 days – All transactions / orders created by the user in the last 90 days. • All – All transactions / orders created by the user.
Sort By	This field can be used to sort the list of transactions / orders that appear on the Checkout page, based on data elements. Selection options include: • Create Date – Sorts list of transactions / orders based on the creation date. • Payment Form – Sorts list of transactions / orders based on the payment form. • PO # – Sorts list of transactions / orders based on the PO number. • Recently Added – Sorts list of transactions / orders that were recently added. • Status – Sorts list of transactions / orders based on the status. • supplier (A-Z) – Sorts list of transactions / orders in ascending order based on the supplier name. • supplier (Z-A) – Sorts list of transactions / orders in descending order based on the supplier name. • Transaction # – Sorts list of transactions / orders based on the transaction number. • Transaction Name – Sorts list of transactions / orders based on the transaction name.
Search Transaction # or PO #	This field can be used to search for a transaction / order based on the Transaction Number or Purchase Order Number .
Clear All	This link can be used to clear all filter and search criteria.

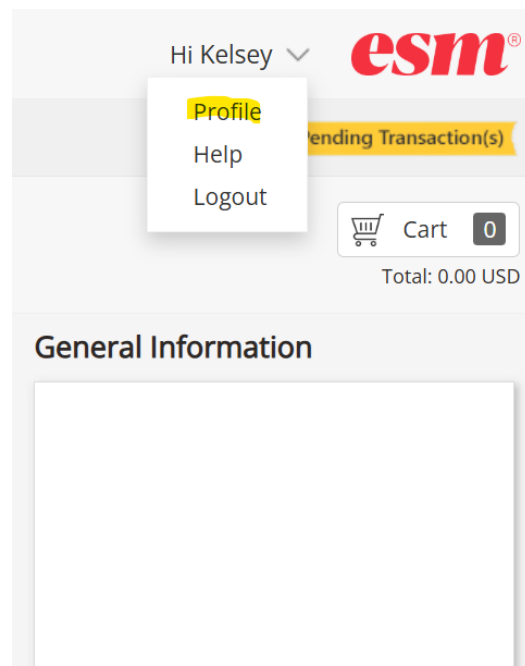
V. Assigning a Delegate

Approvers who will be out of the office or otherwise unavailable for any period of time may assign a delegate to approve requisitions in their absence.

- To assign a delegate, navigate to your name in the upper right hand corner of the screen.



- Click the down arrow next to your name. Select "Profile".



- In the lower left hand corner, you will see the fields “Delegate Email ID” and “Delegate Status”

- In order to set a delegate, enter your delegate’s email address in the “Delegate Email ID”, set the “Delegate Status” to Active, and enter a Start Date and End Date.
- If you do not know how long you will be away, you can leave the End Date field blank, and the person you specify will be your delegate indefinitely.
 - IMPORTANT NOTE: Your delegate must be someone who has already been set up with access to ESM. Please confirm before setting someone as your delegate.**
- Once you have completed the delegate fields, click the blue “Update” button in the upper right hand corner.