ESM Requisition & NCJ Approver Instructions
The University of Tennessee

10/12/2018
Approvals

NOTE: Please do not use Internet Explorer as your browser. Suggested browsers are Chrome and Firefox.

If you are an approver, you will receive an email from noreply@esmsolutions.com notifying you that there is a transaction that needs approval. Below you will see an example of that email.

Dear Abbe,

Christine Reynolds has requested your review and approval of Transaction 563853 - 01/12/2017-11:55-Reynolds-ZEITGEIST FILMS. Please click here to log into the ESM Purchase application to take appropriate action.

If you wish to contact the requestor, please do so at REYNOLDS@TENNESSEE.EDU.

Thank you,

ESM Solutions Customer Support Server

NOTE: This is a system generated email. Please do not reply to this email.

When you click on “click here,” you will be directed to the IRIS web portal where you will sign in with your net ID and password.
Once you’ve logged in to the IRIS portal, you will be brought to the Market Place and your approve tab. In this example, you see there are eight transaction awaiting approval.

To expand a requisition, click anywhere in the requisition, including the hyperlink.
In order to review an NCJ, click on the attached NCJ form for the department's justification. This will be found in the internal notes: attachment field.

Click on details to see account assignments and account splits.
The NCJ Form will look like this:

**The University of Tennessee**

**Purchase Requisition**  
**Non-Competitive Justification**

Complete all that apply:

- [ ] New Purchase  
- [ ] Amendment to an existing purchase order

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Start Date</td>
<td></td>
</tr>
<tr>
<td>Amendment Start Date</td>
<td></td>
</tr>
<tr>
<td>Original End Date</td>
<td></td>
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<tr>
<td>Amendment End Date</td>
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<tr>
<td>Original Amount</td>
<td></td>
</tr>
<tr>
<td>Amendment Amount</td>
<td></td>
</tr>
<tr>
<td>Total Amount with ALL Amendments</td>
<td></td>
</tr>
<tr>
<td>Previous PO #</td>
<td></td>
</tr>
</tbody>
</table>

- [ ] Supplier or equipment is specifically named in the grant or proposal
- [ ] Supplier is a subcontractor named in the grant or proposal

Explain in detail why the University should use Non-Competitive negotiation rather than a competitive process:

[ ]

Approval Notes:

[ ]
Once you’ve reviewed the transaction, you can approve or reject it. If you wish to reject, a window will open up and allow you to enter your reason for rejection.

You can check the workflow of your transaction by selecting view workflow from the next step dropdown menu.
Viewing & Searching for Transactions

When searching for transactions, you must first enter the election criteria. Please note that the selection criteria will default to the setting you last used in ESM. If you had searched under “active” in your last session in ESM, then “active” will be the selection criteria the very next time you log into ESM.

**Active** will bring up any transactions that you can currently approve.

**All** will bring up all transactions that have passed through your workflow whether they have already been approved or are still awaiting approval.
**Glossary**

**Active** = Transaction is active for user and requires user’s input before it can move on to the next step in the process.

**Waiting** = Transaction was active for the user at one point and is active for someone else (for example, a requester sees their transaction as waiting because it is pending approval).

**Hold** = User has placed the transaction on hold.

**Archive** = User has opted to archive the transaction. A transaction in this state cannot be modified but if it has hosted or non-catalog items, it can be copied.

**Submitted** = Transaction has been submitted to the supplier and has had no receipt or invoice activity.

**Received** = Transaction has been submitted to supplier and has had receiving activity.

**Invoiced** = Transaction has been submitted to supplier and has had invoicing activity.

**Ad Hoc** = Transaction was sent to user for Ad Hoc approval or was previously approved via Ad Hoc.

**All Last 30 Days** = Display all requester/approver transactions (regardless of status) with a create date within the last 30 days. Excludes Ad Hoc.

**All Last 90 Days** = Display all requester/approver transactions (regardless of status) with a create date within the last 90 days. Excludes Ad Hoc.

**All** = Display all requester/approver transactions regardless of status. Excludes Ad Hoc.
(Transactions sent for ‘Ad Hoc Approval’ are excluded from the ‘All’ selections so they do not display on a user’s screen twice.)