



**Red Dragon Depot**  
**Approvers Training**  
**Manual**

Update- 10/29/2019

## What is Red Dragon Depot?

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Red Dragon Depot is an on-line application that provides for a one-stop procure-to-pay system. The University has partnered with ESM Solutions' easyPurchase on-line application for its procurement needs. The University has branded this application "Red Dragon Depot" and it is where SUNY Cortland will shop! The application allows for creation of purchase requisitions through vendor catalogs and other order types, providing for a one-stop shopping experience. Once all approvals are in place within the system, the order is automatically transmitted to the vendor for catalog orders only. P-card orders over \$2500 will be reviewed by the P-Card Administrator for release to vendors. Purchase Orders are released through the approval process to the Purchasing and Accounts Payable Office with no additional paper copies required.

## Maximizing Site Performance: Single Sign On

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Log in will be through an easy link in myRedDragon on the Faculty/Staff page.

## Maximizing Site Performance: Email Notices

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The Red Dragon Depot system relies heavily on email notification to communicate issues regarding order approval notices, order rejection notices, etc.

**To ensure you receive all these applicable emails, please do the following:**

- Note that all emails will come from [noreply@esmsolution.com](mailto:noreply@esmsolution.com).
- Add [noreply@esmsolutions.com](mailto:noreply@esmsolutions.com) to your contacts or address book.
- View your email SPAM folder to verify none of the Red Dragon Depot emails have inadvertently been delivered there.

## Approving Orders: Overview

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- Orders may be approved in Red Dragon Depot from a **desktop, laptop, iPad or smart phone**.
- **Internet Browsers must be set to allow pop ups for Red Dragon Depot.**
- All orders will route through a predefined approval path known as "Workflow".
- If you have "E-mail Alerts" checked in your user profile, you will receive an e-mail when an order is awaiting your approval.
- Approver can log in via the link in the email (this will route through My Red Dragon) or by following the directions in "Approving Orders: Login" section below.

- Approvers with active email alerts will receive an email from the system when an order has been placed for approval:



Fri 9/22/2017 1:17 PM

noreply@esmsolutions.com

Review and Approve: 838952 - 09/22/2017-11:32--Room 309-Noreast Property Management

To: Kristi Hughston

Campus Communicator

Action Items

+ Get more apps

Dear Kristi Hughston,

Kristi Hughston :Room 309 has requested your review and approval of Transaction 838952 - 09/22/2017-11:32--Room 309-Noreast Property Management. 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 [kristi.hughston@cutland.edu](mailto:kristi.hughston@cutland.edu).

Thank you,

ESM Solutions Customer Support

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



## Approving Orders: Login

### ACCESS Red Dragon Depot:

Sign in on the myRedDragon login page:

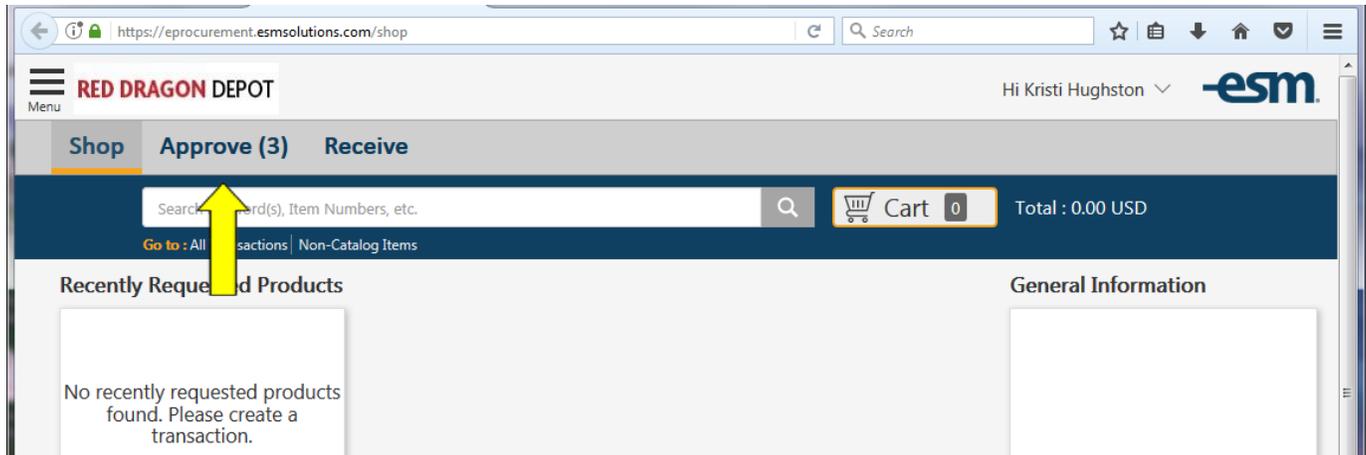
<https://exfe1.cutland.edu/adfs/ls/?wa=wsignin1.0&wtrealm=urn:federation:cas>

Choose the Faculty/Staff tab.

Select "Red Dragon Depot (Purchasing)" link.

The screenshot shows the SUNY Cortland myRedDragon website. The top navigation bar includes the Cortland logo, a welcome message for Kristi Michelle Hughston, and links for Home and Sign Out. Below this is a secondary navigation menu with tabs for Home, Tech Help, Library, Academics, Faculty/Staff (which is highlighted), and Campus Life. The main content area is divided into three columns. The left column has an 'About Me' section with a dropdown menu for 'Select a scope of view' set to 'Public' and a link to 'Update/Edit Your Directory'. The middle column has a 'Faculty/Staff Directory' section with a search box and a 'Note: You can search by part or all of a person's last name, or department.' Below that is 'The Cortland eLearning System' section with links to 'Blackboard Courses and Organizations', 'Blackboard Tutorials', and 'Blackboard Help'. The right column has an 'Important Links' section with two sub-sections: 'SUNY Resources' (including SUNY Portal Logon, HR Services/TAS, and Confluence) and 'myRedDragon Resources' (including Red Dragon Depot (Purchasing), Self Service Banner, Online Employment System, Welcoming Team Signup, Online Training, Information Security Training, Advertise Rental Property, and Course Materials Requisition). A yellow arrow points to the 'Red Dragon Depot (Purchasing)' link in the myRedDragon Resources list.

A separate window will open and you are in Red Dragon Depot.



Note: Not every user will have the tabs show in this view. **Approvers need the “Approve” or “Manage” tab.**

## Approval Process

Select the “Approve” or “Manage” Tab to see orders waiting for approval.

Approval Transactions (Total 2)

Filter By: Active Showing: All Sort By: Create Date Search Transaction# or PO# Clear All

Total Line Items: 1	Total Value: 143.16 USD	Create Date: 10/29/2019	Order Type: Standard		Pending Approval
Transaction #: 1783155	PO #: 329495	Supplier: ENTERPRISE HOLDINGS	Requester: Wendy Sirvent :Room B-58	Approve Arrival Date: 10/29/2019	
Total Line Items: 1	Total Value: 39,650.00 USD	Create Date: 10/28/2019	Order Type: Standard		Pending Approval
		Supplier: LINK-SYSTEMS	Requester: Tracy Smith	Approve Arrival Date:	

Click anywhere on the order to open the order details.

You can approve, reject or send an order as an Ad Hoc Review from this screen. Once the order has been reviewed (see Approving Orders: Viewing the Order section below):

- “Approve” will process the item to the next approver in line.
- “Reject” will open a comments section to tell the originator why the order is being rejected.
- "Ad Hoc Review" will send the order to another approver not typically in the approval workflow of the order originator. This can be used at times where funding is coming from another department. The order will return to your approval in-box once reviewed.

# Approving Orders: Viewing the Order

### Approve

General Details

\* Payment Form:  Credit Card  PO

Release Method:

Order Type:

Purchase Order #: 329495

Fiscal Date:  [reset](#)

Account Code 1:

Account Code 2:

[Continue](#)

### Transaction Summary

Transaction #: 1783155

Create Date: 10/29/2019

Supplier: ENTERPRISE HOLDINGS [Change](#)

**Requester: Wendy Sirvent :Room B-58**

Cart Originator: Wendy Sirvent :Room B-58

Approve Arrival Date: 10/29/2019

Selection: Active

Status: Pending Approval

System Note: None

**Total Line Items:** 1

**Subtotal:** 143.16

**Tax:** 0.00

**S & H:** 0.00

**Total Value (USD):** 143.16

[Delivery Details](#)    Attn : Wendy Sirvent :Room B-58    Location : Van Hoesen Hall    [Change](#)

[Billing Details](#)    Attn : Accounts.Payable@Cortland.edu    Location : Attn:Accounts Payable    [Change](#)

[GL Details](#)    [Change](#)

[Line Item Details \(Total: 1\)](#)    [Change](#)

[View Workflow Details](#)    [Change](#)

Approve

Reject

Ad Hoc Review

Attachments may be here or in the line item details. Please review both sections when looking for documents.

- The Transaction Summary, line levels and notes and attachments are now displayed.
- In this view you can review each item in the order individually by opening the line items detail option. When review is complete, select the approve or reject button.

Line Item Details (Total: 1)

Item Details	* Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> </div> <div> <p>Enterprise Rent-A-Car for [REDACTED]</p> <p>CSPA-NYS Annual Conference 10/19/2019-10/22-2019 in Fairport, NY</p> <p><a href="#">edit</a></p> </div> </div>	<input type="text" value="1"/>	143.16 / Each	143.16	0.00	0.00	143.16 <a href="#">more...</a>

**Notes and Attachments:**

[Internal Note](#)

[External Note](#)

Attachments may be here or in the notes and attachments section. Please review both sections when looking for documents.

- Approvers can open *external* notes and attachments at the notes and attachments sections to view what will be provided to the vendor.
- Approvers can open *internal* notes and attachments to see the back-up provided to the purchasing office or notes shared within our campus offices only.
- Approver can view the account associated with the order charges to verify the information is accurate.

# Approving Orders: Viewing Workflow

Workflow is simply the approval path an order will follow. Viewing the workflow may only be done by clicking the "View Workflow Details" section of the order.

\*\*Viewing the workflow is not a requirement to approving an order. It is done at the approvers' preference.

### Approve

- General Details
- Delivery Details      Attn : Wendy Sirvent :Room B-58      Location : Van Hoesen Hall
- Billing Details      Attn : Accounts.Payable@Cortland.edu      Location : Attn:Accounts Payable
- GL Details
- Line Item Details (Total: 1)

[View Workflow Details](#)

Top to bottom is the consecutive flow of the approval path for the order:

- Approved- The date and time are shown by the name of the approver.
- Active- The order is currently waiting in the queue for approval.
- Pending- The order has not yet gone to the queue.

View Workflow Details		
Workflow Name	Approver Name	Status
Wendy Sirvent	Ralph Carrasquillo :Room B-33	Approved - 10/29/2019 16:13 ET
	NEXT Greg Sharer :Room 407A	Approved - 10/29/2019 16:18 ET
Purchase Order	Kristi Hughston :Room 309	Active - 10/29/2019 16:18 ET
	NEXT Casey Avery :Room 309	Pending

Once the order has been approved you can view workflow.

# Approving Orders: Delegating Approval When Absent

You may choose a delegate to approve your orders while you are away. To make this change you will go into your user profile: (if you prefer, call Casey Avery at x2307 to have the change made)



Select a delegate from the dropdown menu and select the “Active” Delegate Status below. You may also set a start and end date for the delegation of duties.:

A screenshot of the "profile" configuration page. The page is divided into three main sections. The left section contains personal information fields: "Email ID" (kristi.hughston@cortl), "First Name" (Kristi Hughston), "Last Name" (:Room 309), "GL User Name" (kristi.hughston), and "Phone" (607-753-2582). Below these are "Privileges" (Transfer Originator's Cart, Checkout tab, Approve tab, Manage Tab, Office tab, Receive tab (Qty), Receive tab (Value)), "Receive Filter" (Entity Wide, User Specific), and "Menu Options" (Order Summary, Reporting, Admin). The "Delegate Email ID" is set to melissa.fox@cortland.edu. The "Delegate Status" is set to "Active" (radio button selected), with "Inactive" as an option. "Start Date" and "End Date" fields are present but empty. The middle section is titled "Change Order" and includes "Payment Forms Permitted" (Credit Card, PO), "Privileges" (Change Order), "Approval Process" (Request Change, Direct Release), "Change Order Filter" (Entity Wide, User Specific), "Allow Approver Edits" (Non-Catalog Item/Supplier, Transaction Name, Payment Form, Purchase Order #, Release Method, Order Type, Notes/Attachments, Fiscal Date, Aux Fields, Need By Date, Account Code, Quantity, Commodity Code), "Create Non-Catalog Suppliers", "Order Summary Edit", "Edit Cart Transferred To", and "Cart Transferred To". The right section is titled "Email Alerts" and includes "Time Zone" (Eastern Time) and "Language" (English). It also shows "Default Ship to" and "Default Bill to" information for Central Receiving at 32 Stratton Drive, Cortland, NY 13045. An "Update" button is located at the top right of the form.

\*profiles may appear different\*

If you do not find the approver you are looking for please contact Casey Avery to set up an account for that user.

**Please remember to change the status to inactive when you return if you have not set an end date.**