



Red Dragon Depot
Approvers Training
Manual

Update- 10/29/2019

What is Red Dragon Depot?

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

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

Maximizing Site Performance: Email Notices

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.
- Add 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

- 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.

Approving Orders: Viewing Workflow

Workflow is simply the approval path an order will follow. Viewing the workflow may only be done **EE OLFNLWKHHH RUNITORHWDLOWHFWLRRWKRHHU**

**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:

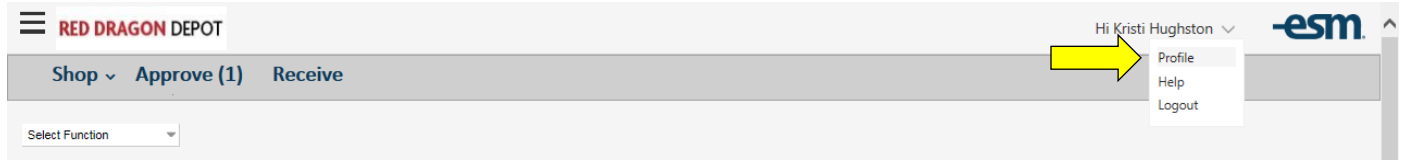
- Approved- The date and time are shown by the name of the approver.
- Active- The order is currently waiting in the queue for approval.
- Pending- The order has not yet gone to the queue.

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 Kristi Hughston at x2582 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 user profile page. The page is titled "profile" and contains several sections. On the left, there are fields for "Email ID", "First Name", "Last Name", "GL User Name", and "Phone". 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). A "Delegate Email ID" dropdown is set to "melissa.fox@cortland.edu". The "Delegate Status" is set to "Active" (radio button selected), and "Start Date" and "End Date" fields are highlighted in yellow. 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) dropdowns, and "Default Ship to" and "Default Bill to" addresses. 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 Kristi Hughston 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.