SUNY

Cortland

Purchasing Office

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.

- 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@cortland.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.cortland.edu/adfs/ls/?wa=wsignin1.0&wtrealm=urn:federation:cas

Choose the Faculty/Staff tab.

Select "Red Dragon Depot (Purchasing)" link.

A separate window will open and you are in Red Dragon Depot.
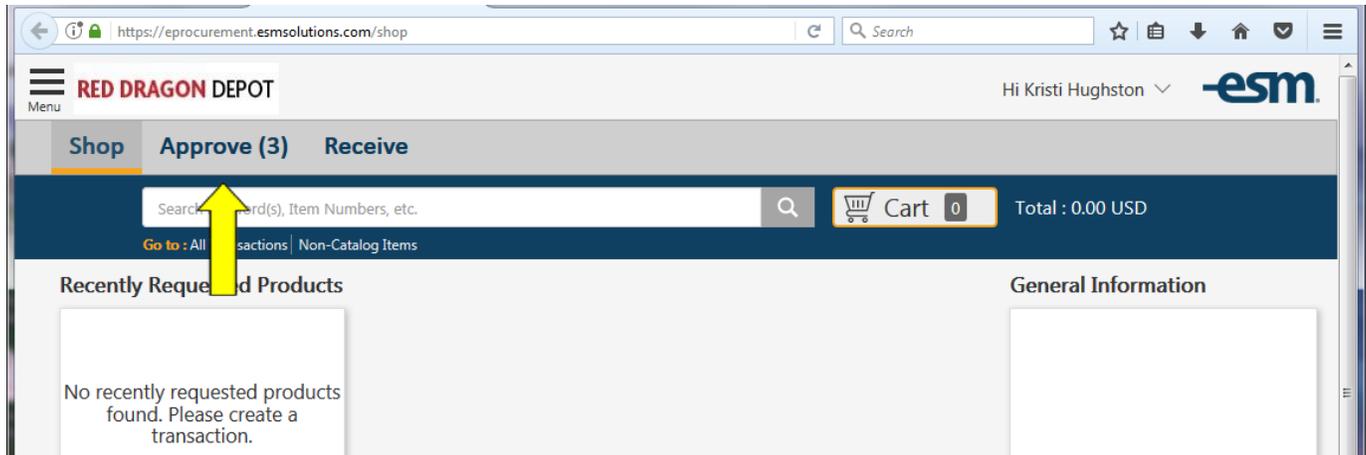
Note: Not every user will have the tabs show in this view. **Approvers need the "Approve" or "Manage" tab.**

Approval Process

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

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

- 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.

- 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		

Approve   Reject   Ad Hoc Review

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.:

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.