



Red Dragon Depot
Training Manual

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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 vendor. Purchase Orders are released to the Purchasing Office with no additional paper copies required.

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.

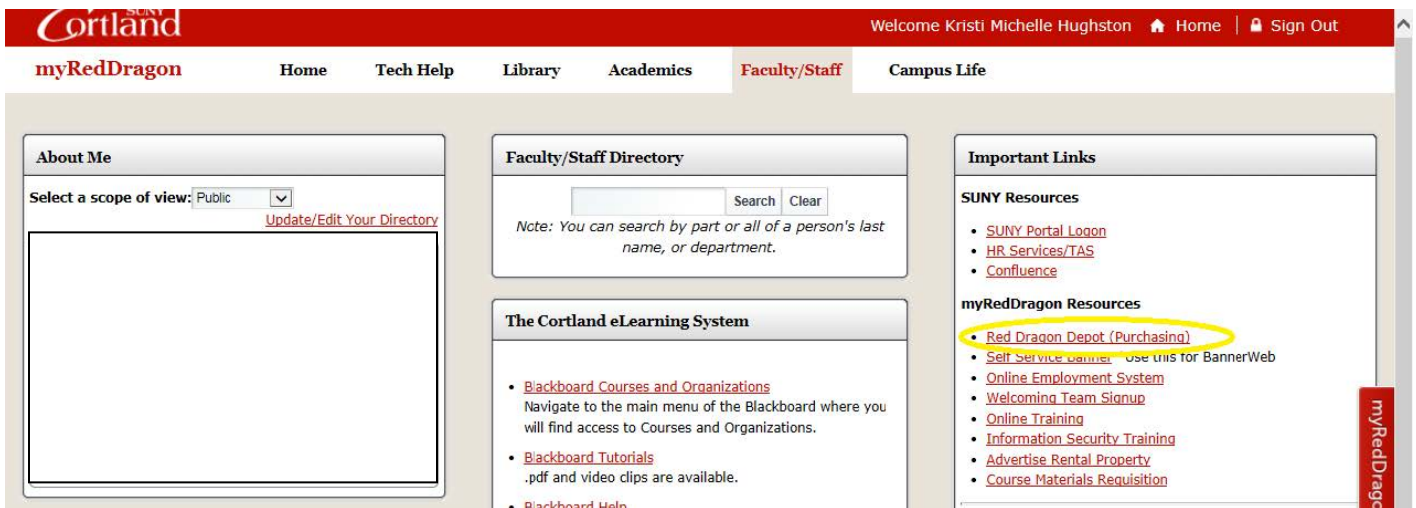
Creating Orders: Overview

- Orders may be entered in Red Dragon Depot from a desktop, laptop, iPad or smart phone.
- **Internet Browsers must be set to allow pop ups in Red Dragon Depot.**
- Orders within Red Dragon depot fall into one of three main classifications:
 1. Catalog Punch-out: Red Dragon Depot takes the user directly to the vendor's site. Supplier icon and link is displayed on the home page which connects to an on-line catalog. These are P-Card only catalogs unless otherwise specified. (ex. Staples)
 2. Catalog Hosted: Red Dragon Depot hosts (holds) a file of the vendor's items, prices and product information. (ex. NYSPSP)
 3. Non-Catalog: Vendor exists in vendor directory but not found as a catalog in Red Dragon Depot. (Purchase order vendors)

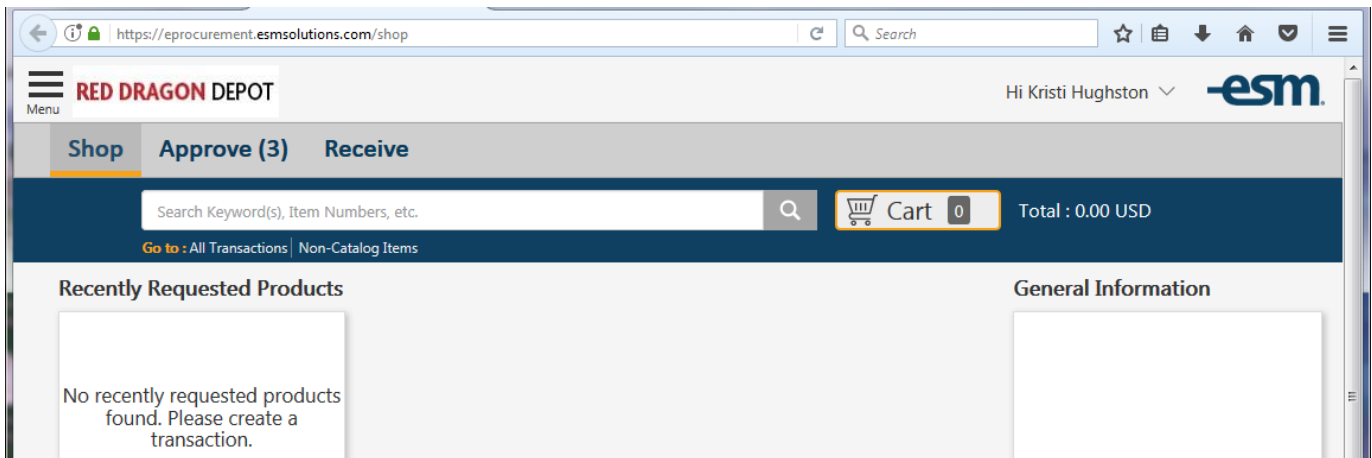
Creating Orders: Login

ACCESS Red Dragon Depot:

Go to the myRedDragon login page. When you log in, you will find the Red Dragon Depot link on the Faculty/Staff page.



A separate window opens and you are in Red Dragon Depot.

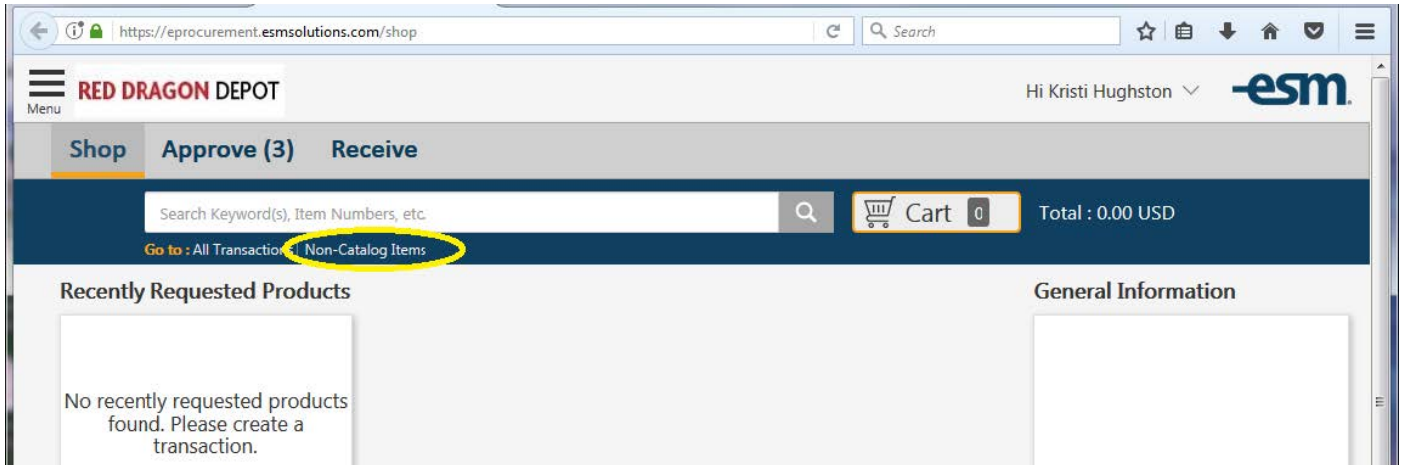


Note: When you click the Log Out in Red Dragon Depot, you get an ESM logoff page. You can close that window and you are still in myRedDragon.

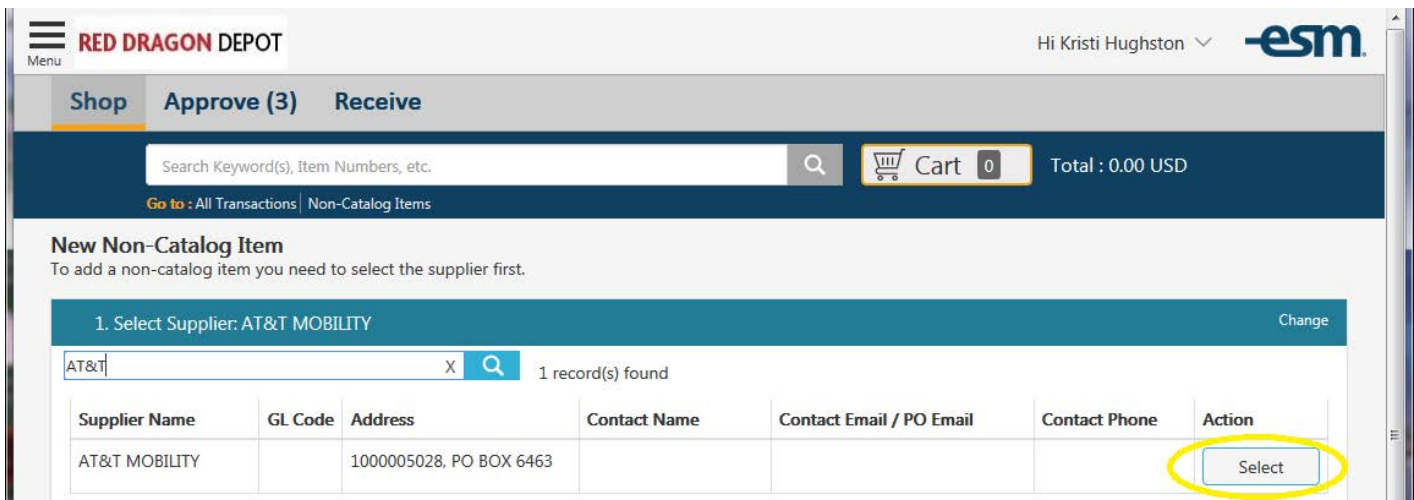
Creating Orders: Non-Catalog

Non Catalog: A non-catalog order is an order issued to a vendor existing in the vendor database but not found as a catalog in Red Dragon Depot.

1. Under the keyword search bar find “Non-Catalog Items” link.
2. Search for supplier, if no supplier is found call or email the Purchasing and Accounts Payable Office to have vendor added.



3. If your vendor is in the system or if multiple vendors show, click “Select” for the vendor name from whom you wish to purchase items.



4. Fill in "Add Item" menu:

- Item/Service: Add a description of the purchase and "Per attached quote".
- Unit of Measure (UOM) does not change.
- QTY is 1.
- List Price is the total from the quote. (Unless you break out shipping & handling)
- S&H can be added or S&H can be \$0 and included in the total.
- No options on the right hand side are required to be included. You may add information at your discretion.
- Click "Add to cart".

Search Keyword(s), Item Numbers, etc. Total : 0.00 USD

Go to : All Transactions | Non-Catalog Items

New Non-Catalog Item

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

1. Select Supplier: AT&T MOBILITY [Change](#)

2. Add Item

Item/Service: Phone Accessories. Per attached quote #2131 dated 10/1/2017

UOM: Each

Qty: 1

List Price: 300.00

S & H: 0.00 USD

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:


CAS Number:

The order is now shown in your cart:

Search Keyword(s), Item Numbers, etc. Total : 300.00 USD

Go to : All Transactions | Non-Catalog Items

Item Summary (1 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
 AT&T bill for October 2016 By: AT&T MOBILITY Catalog Item #: Mfg/Provider:	1	300.00 / Each	300.00

Cart Summary

Total Item(s) in Cart	1
Number of Suppliers	1
Cart Total (USD)	300.00

Convert Cart to 1 transaction(s)

If you are ready to check out, refer to the section entitled "Checking out: Convert Cart to Order".

Creating Orders: Hosted and Punch-out Catalogs

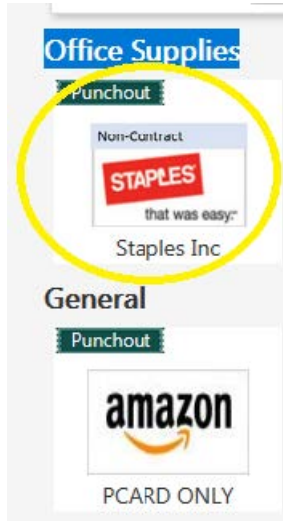
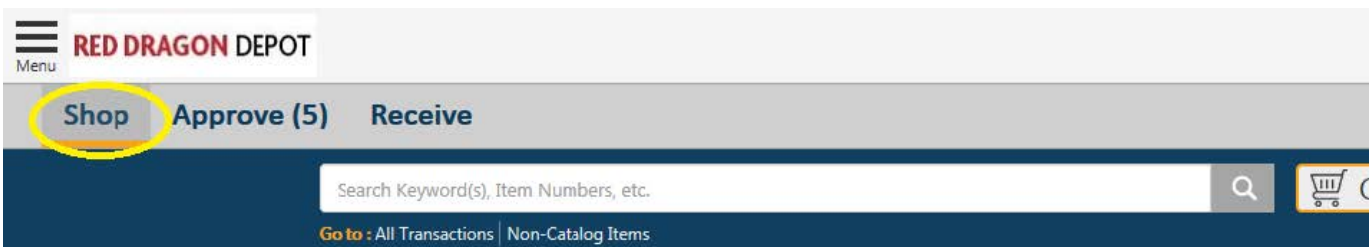
There are two types of catalog orders: Hosted and Punch-out. The icons for both are located on the main shopping page.

Hosted Catalog: Hosted catalog orders are where Red Dragon Depot holds (hosts) a file of the vendor's items, prices, and product information. You do not actually go to the vendors' website.

Punch out Catalog: The order actually "punches out" to vendor's live website. Each site is vendor specific, therefore these directions are general. Each website will vary.

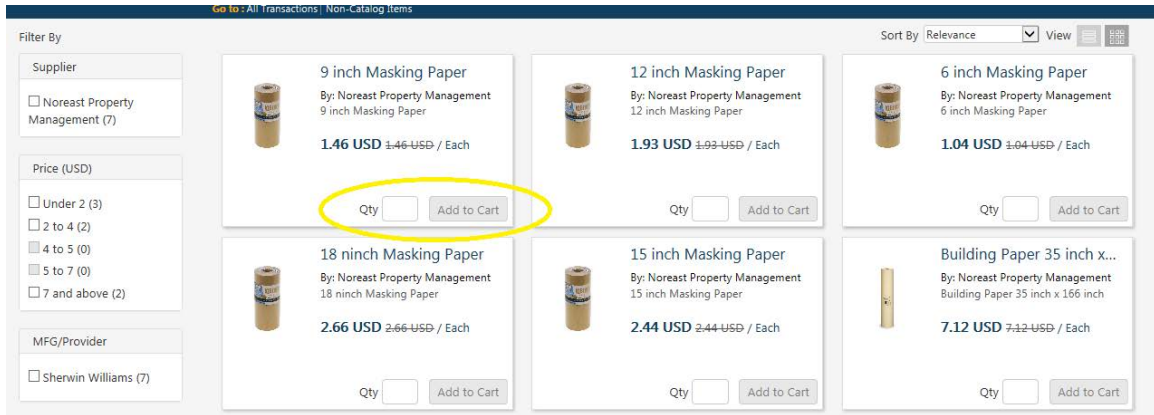
Begin by searching for products:

1. Click "Shop" button on top left part of screen if you are not on the Shop page.
2. Click the catalog icon you wish to order from:

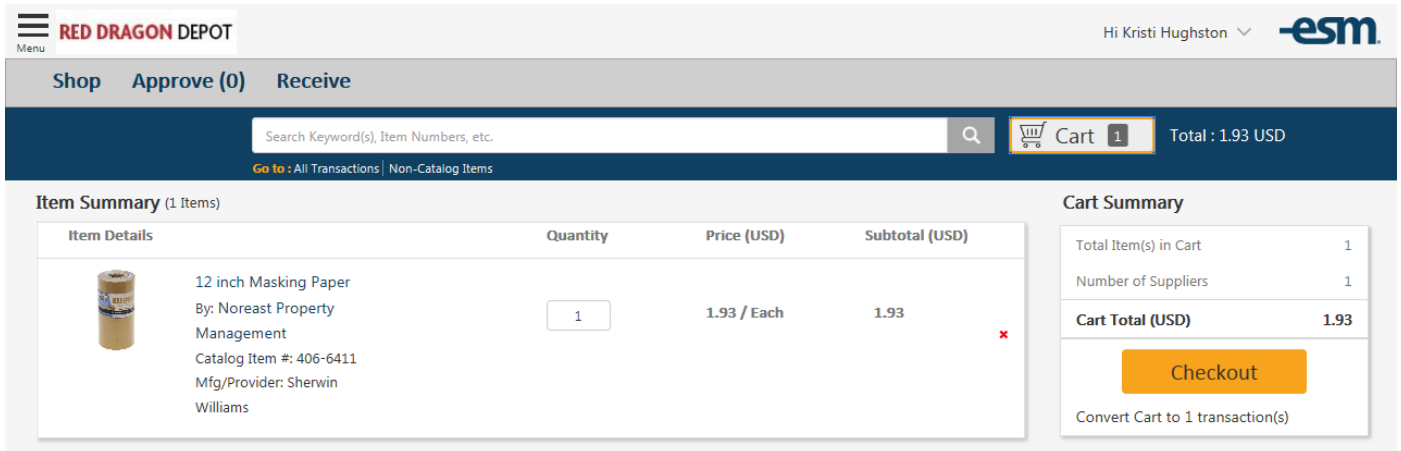


NOTE: The "Keyword Search" field, located at the top of the screen will only return results from hosted catalogs.

If you choose a hosted catalog results will show in existing screen.

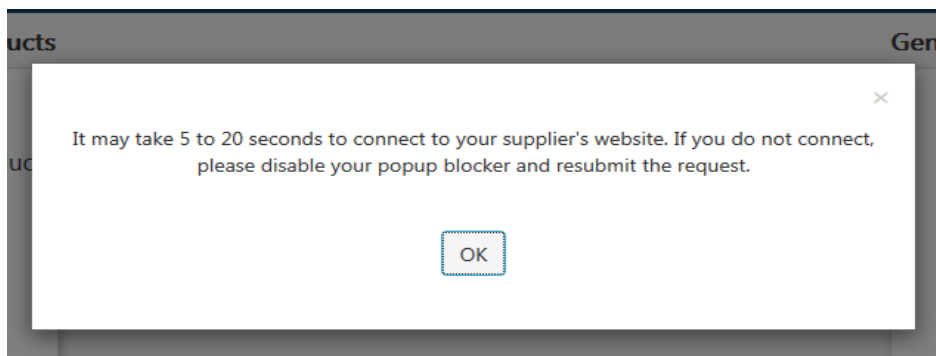


- Type desired quantity.
- Click "Add to cart" button.
- Order will now show in your cart.

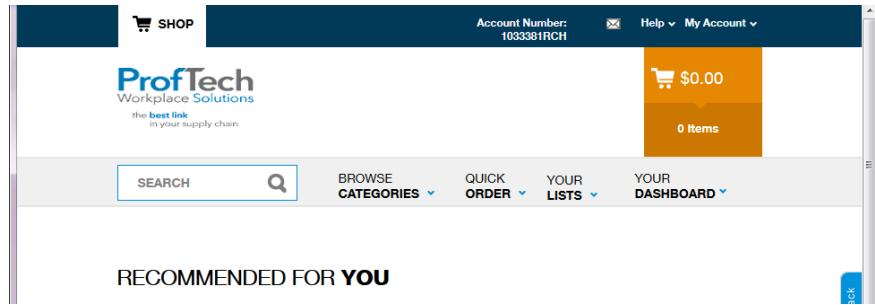


If you are ready to check out, refer to the section entitled "Checking out: Convert Cart to Order".

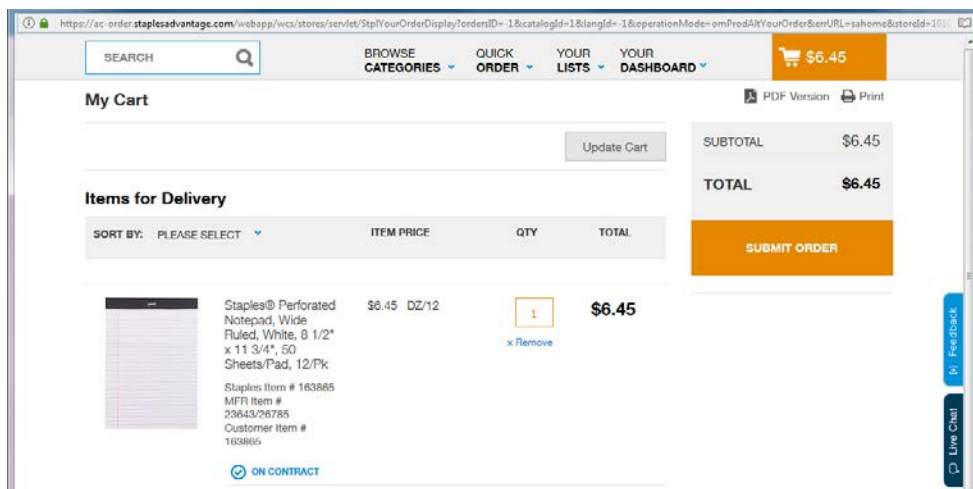
If you choose a punch-out catalog, results will open in a new window. You will see this notification first, then a separate window will open (shown in picture two). If the catalog does not open enable pop ups for this site.



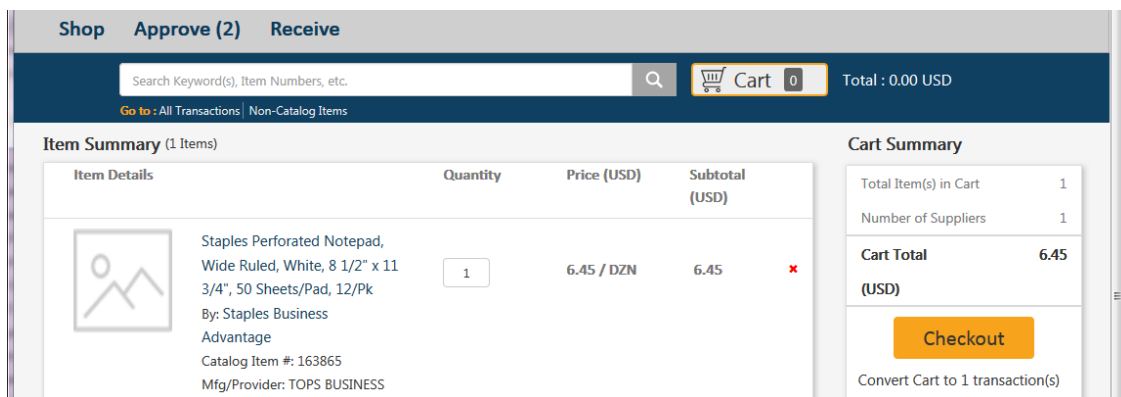
The catalog will open in a new window with the same look and feel of the vendor site you usually use.



- Make selections and build your cart as you would with direct use of the vendor’s website.
- When finished go to cart.



- Choose “Submit Order”, this will close the punch-out catalog window and revert back to Red Dragon Depot. Item(s) will now be in the cart.



If you are ready to check out, refer to the section entitled “Checking out: Convert Cart to Order”.

Checking Out: Converting Cart to Order:

Checkout is where the following actions are performed:

- Change order type if necessary
 - Add internal and external notes
 - Add internal and external attachments
 - Update ship to information
 - Assign account code/s
1. Request Approval
 2. View Workflow

To checkout do the following:

1. If not already in your cart, click “Cart” on the shop screen next to the search bar. The “cart” is where you may review the items you have selected and change quantities if desired. You may use the **RED X** to remove an entire commodity line.

You may also return to “shop” from the cart if necessary. **Additional items selected will be added to the current cart.**

2. Select “Checkout” when ready, which begins the process of converting the requisition to a purchase order or P-Card transaction.

3. Transactions Information Page View:

The process is a step by step approach. You will finish sections individually before submitting the order for approval. Navigation steps are shown below:

Side Bar Details:

A "Transaction Summary" is provided to summarize the order as it is input.

The "Transaction Name" can be updated as a reference to the order purpose. (example "Standing order for AT&T 7/1/19-6/30/2020)

Notes and Attachments will be loaded here for the entire order. There are also notes and attachment options for each line item detail however, it is not required to separate the documents by line.

Transaction Summary

Transaction #: 120099
 Create Date: 08/08/2018
 Supplier: ABC Supplies
 Requester: Kristi Hughston :Room 309
 Selection: Active
 Status: Unsubmitted Transaction
 System Note: None

Total Line Items:	1
Subtotal:	500.00
S & H:	0.00
Total Value (USD):	500.00

Transaction Name

08/08/2018 11:32--Room 309-ABC

Notes and Attachments

Internal Note External Note

Checkout Buttons:



There are four buttons at the top of the checkout screen.

Button Reference Guide:

- Print order.
- Archive order. (We do not need to use this feature)
- Delete transaction.
- Hold order. This will allow you to finish the order later.

Notes and Attachments

Internal Note External Note

To add notes: select the sheet of paper. Type notes for internal or external use. External notes will print on PO and go to vendor.

To add attachments: Select Choose file and select "Update". You may add multiple documents however there is a document size limit.

File:
(Attachments will not be sent to suppliers who receive transactions via POXML.)

Uploaded Attachments:

Delete	File Name	File Size	Upload Date
<input type="button" value="Update"/>			
<input type="button" value="Delete"/>			
<input type="button" value="Close"/>			

A. General Details:

You will select your Payment Form; Credit Card or PO. Next enter your account code in GL Account Code 1. If you have more than one account use GL Account Code 2. Finally, the Campus IR Order # is ONLY for Information Resources to use for user related purchases. Please do not fill this field. When finished select "Continue".

General Details

* Payment Form: Credit Card PO Continue

* Purchase Order #:

GL Account Code 1:

GL Account Code 2:

Campus IR Order #: **IR USE ONLY**

B. Delivery Details:

You have the option to change the "Ship to- Attn:" field.

You will have a default location but you now have the option to change the shipping location. The drop down menu will have all campus shipping locations available. Once you have chosen your shipping location select "Continue".

Delivery Details

* Ship To - Attn:

Default Location:	Recently Used Locations:	
<div><p>Central Receiving</p><p>Attn: Kristi Hughston :Room 309 32 Stratton Dr. Cortland, NY 13045 607-753-2509</p><p><input checked="" type="checkbox"/></p></div>	<div><p>Brauer Education Center</p><p>Attn: Kristi Hughston :Room 309 560 Old Quarry Road Selkirk, NY 12158 518-767-9538</p><p>Select</p></div>	<div><p>Bishop Hall</p><p>Attn: Kristi Hughston :Room 309 11 Neubig Road Cortland, NY 13045 607-753-2509</p><p>Select</p></div>

Search:

Continue

C. Billing Details: ****VERY IMPORTANT INFORMATION****

Select "Continue". Although offered the option to change this information, the "Bill To" information should always stay at the default of:

Accounts Payable
PO Box 2000
Cortland NY 13045

Billing Details

* Bill to Attention: Accounts Payable

Default Location:

Accounts Payable

Attn: Accounts Payable
PO Box 2000
Cortland, NY 13045
607-753-2408

Search: Type location name

Continue

D. GL Details:

Type your account code in the favorites drop down menu. If the account is not in the drop down menu select (+) to search and apply the account. If you have multiple accounts you can split code the order as done before. When the account section is completed select "Continue".

GL Details

Account Code/Favorite

Select Account Code

Item Split Details:

NOTE: Remaining USD / % Split must be 0.00 in order to apply account(s) to transaction


Chart	Index	Account Code	Description	USD Split	% Split	Action
Chart of Accounts		860760-00-PU RCHASING		500.00	100.00	





Remaining: 0.00 0.00

Continue

E. Line Item Details:

Each line of your order will show here. If you want to apply a split code by dollars, you will do that at this level. This is the same process as before. When you have completed this section select "Continue".

Item Details	* Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1  electrical supplies edit	1	500.00 / Each	500.00	0.00	0.00	500.00 more... ✖

Notes and Attachments:
Internal Note   External Note  

[Continue](#)

F. View Workflow Details:

Each users workflow will show in this section. When finished viewing select "Submit". The "Forward" and "Ad Hoc Review" options should only be used for an order if directed to do so by the Purchasing and Accounts Payable Office.

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.

Workflow Name	Approver Name	Status
Kristi Test	Kristi Hughston :Room 309	Pending

[Forward](#) [Ad Hoc Review](#) [Submit](#) *See next page for Prepare CC Order

When you select "Submit" you will receive this information box. Select "Yes".

Submit ✖

Are you sure you want to submit the transaction?

[Yes](#) [No](#)

“Prepare CC Order” for P-Cards will open the screen below:

SUNY Cortland

Northeast Property Management
414 Elwood Ave.
Hawthorne, NY 10532
United States
Attn: Anthony Gisondi
Phone: 914-557-0281

Date: 9/22/2017
Purchase Order #: 320949
Transaction #: 838952
Requested By: Kristi Hughston :Room 309
Requester Email: kristi.hughston@cotland.edu
Phone: 607-753-2582
Authorized By: Kristi Hughston :Room 309

Ship To
SUNY Cortland
Central Receiving
32 Stratton Drive
Cortland, NY 13045
United States
Attn: Kristi Hughston :Room 309
Phone: 607-753-2509

Bill To
Entity Name: SUNY Cortland
* Name on Card: Kristi Hughston :Room 3
* Contact Phone: 607-753-2582
Number:
* Card Type: Visa
* Card #: *****
* Expiration Date: May 2019

Order Comments:

Line #	Item #	Description	UOM	QTY	Unit Price	Line Total
1	406-6411	12 inch Masking Paper	Each	2	1.93 USD	3.86 USD

Ship To Attn: Kristi Hughston :Room 309
GL Account Code 1: 860670
GL Account Code 2: 900650

Subtotal: 3.86 USD
Tax: 0.00 USD
S & H: 0.00 USD
Total: 3.86 USD

Continue
Print PDF
Print
Cancel

1. Choose card type. (P-cards are Visa)
2. Enter P-Card number.
3. Enter expiration date.
4. Select “Continue”. You will see the box below.

Cortland, NY 13045
United States
Attn: Kristi Hughston :Room 309
Phone: 607-753-2509

Submit Order - ESM Purchase

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Place Order Cancel

Continue
Print PDF
Print

5. “Place Order”. Your order is now complete.