

Louisiana Seafood Promotion & Marketing Board Request for Purchase

OnBase User Guide

To create a Purchase Request:

1. Open DCRT's Channel Z page; Click on E-Forms



2. In the **Purchasing Request Authorization Forms** section, click on:
Louisiana Seafood Promotion & Marketing Board Request for Purchase -OnBase Workflow Form

3. The **Request for Purchase** form opens with the following information completed: **Requested by**, **Request date** and **Purchase Request ID**

Note: It's a good idea to make note of the "**Purchase Request ID**" which can be used when **retrieving** and/or **importing supporting documents**.

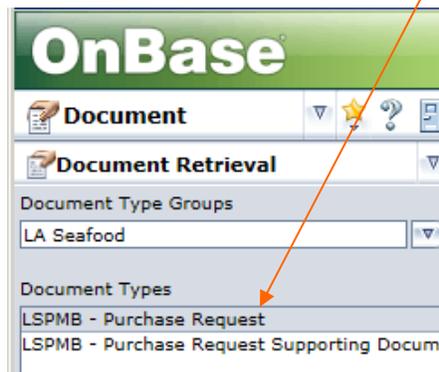
4. Complete the following **required** information:
 - a. Deliver to and Type of Purchase (P-Card or Purchase Order)
 - b. Description, Item number, Quantity, Unit and Unit Cost
5. Complete the following **optional** information:
 - a. Suggested Vendor (Important if a PO is to be generated)
 - b. Desired Delivery Date and Purpose/Comment section
6. When done, click anywhere else on the form other than the last numeric field **to ensure all fields have been totaled** then click on **Submit Form**
7. After clicking on **Submit Form** a dialog box appears, click on **YES** to close the dialog box.
8. Follow the steps below to view the **Request for Purchase document in OnBase**.

To retrieve a Request for Purchase document:

1. Click on the **OnBase** icon located on the ChannelZ page



2. In the **Document Types** section, click on **LSPMB - Purchase Request**



3. In the **Keywords** section, type the appropriate **keyword** value, such as the **Requestor username** and/or **Purchase Request ID** and hit **Enter**

or click on the **Binoculars**  at the bottom of the screen.

4. Documents that match your query will display in the **Document Search Results** window.
5. **Double-click** to open a Purchase Request document.
6. Check the status of the Purchase Request and click on the **Door**  icon to exit OnBase.

To attach a related document to a Purchase Request:

1. Click on the **OnBase** icon located on the ChannelZ page
2. Click on the down arrow next to **Document Retrieval** and select **Import Document**



3. Click on **Browse** and navigate to the file you would like to attach and click on **Open**.
4. In the **Document Type Groups** section select **La Seafood**
5. In the **Document Types** section select **LSPMB-Purchase Request Supporting Documents**
6. Enter the **Purchase request ID#** and **Description** of the attached document
7. Click on the **Import** icon  at the bottom of the screen.
8. **Import Succeeded** should appear at the top of the screen.
9. To view the purchase request and related document, click on the down arrow next to **Import Document** and select **Document Retrieval**, then follow the steps below on **How to view a Purchase Request and supporting document**.

To view a Purchase Request and supporting document:

1. In the **Document Type Groups** section select **LA Seafood**
2. In the **Document Types** section click on **LSPMB - Purchase Request**



3. Enter the **Purchase Request ID #** and hit **Enter** or click on the **Binoculars**
4. Right-click on the **Request for Purchase** form and click on **Cross-References**
5. A list of documents related to the purchase request will appear. Double-click to open a document

Steps to add a sticky note to a purchase request:

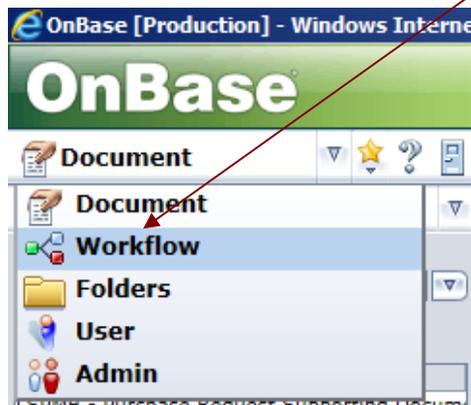
1. In the **Document Types** section, click on **LSPMB – Purchase Request**; enter the **appropriate keywords** and hit **Enter** or click on the **Binoculars**
2. Double-click to open the **Request for Purchase** document
3. Right-click on the **Request for Purchase** document and select **Notes and Add Note**; click on **Sticky Note**, select **OK**
4. Type in the white section of the note
5. When done, close OnBase

LSPMB - Steps to approve or deny a Purchase Request

1. Click on the **OnBase** icon located on the ChannelZ website



2. Click on the down arrow next to **Document** and click on **Workflow**



3. In the **LSPMB–Purchase Request** section, you will see your role, such as **LSPMB-Exec Director, Budget Approval or Deputy Secretary**
4. Select the appropriate **Purchase Request** and click on the icon to **Approve** or **Deny** the request



5. To add a **note** to the document click on **Add Note**. This will notify the requestor that a note has been added to the purchase request form
6. When done, close the Workflow process window and click on the **Door**  icon to exit OnBase.