

Office of State Library Purchase Request 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: Office of State Library 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.

Purchasing Request Authorization Forms (OnBase)		
Volunteer Louisiana Request for Purchase	Onbase Workflow Form rev. 9/5/2018	Instructions
Louisiana Seafood Promotion & Marketing Board Request for Purchase	Onbase Workflow Form rev. 8/15/2013	Instructions
Office of Cultural Development Request for Purchase	Onbase Workflow Form rev. 9/13/2012	Instructions
Office of Management & Finance Request for Purchase	Onbase Workflow Form	Instructions
Office of State Library Request for Purchase	Onbase Workflow Form rev. 4/10/2019	Instructions
Office of State Museum Request for Purchase	Onbase Workflow Form	Instructions
Office of State Parks Request for Purchase	Onbase Workflow Form	Instructions
Office of Tourism Request for Purchase	Onbase Workflow Form	Instructions

4. Complete the following required information:

a. **Deliver to** and Type of Purchase (P-Card or Purchase Order)

b. **Description, Item number** (optional), **Quantity, Unit** (each,dozen, case of 20, etc.) and **Unit Cost. Quantity and Unit Cost are multiplied to get the Extended Cost,**

c. **Key Words** – this is a short "title" for the request which appears in the document's name string in email notifications and for "Document Retrieval."

d. **Purpose/Comments/ Special Instructions.** This is a brief justification for the purpose and should concisely provide information to all the reviewers. This section may also contain instructions on spreading costs across budget entities, or detail any purchasing exigencies.

5. Complete the following optional information:

a. **Suggested Vendor** (Important if a PO is to be generated)

b. **Desired Delivery Date**

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.

To View a Request for Purchase Document

Follow the steps below to view the Request for Purchase document in OnBase.

1. Open OnBase from the link on ChannelZ.



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

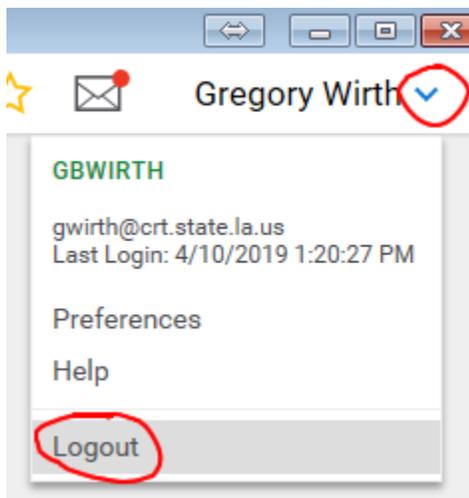
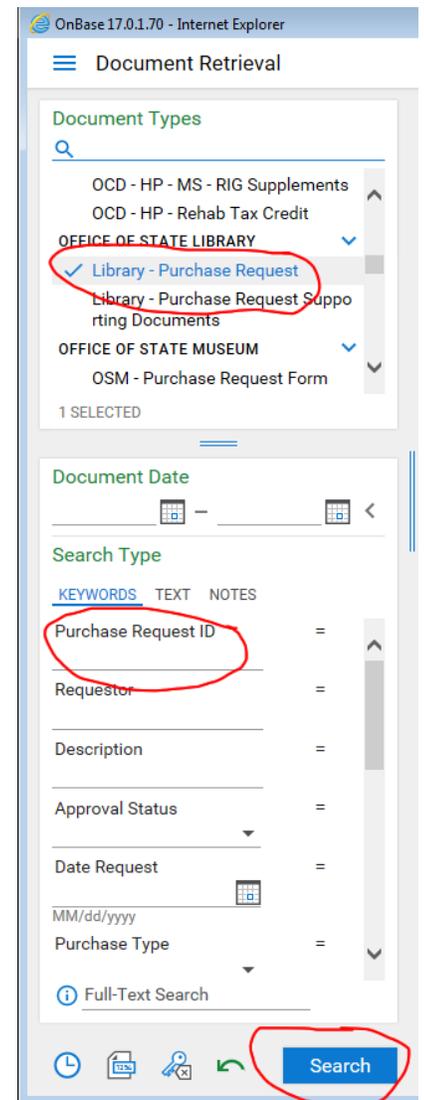
3. In the Keywords section, type the appropriate keyword value, such as the **Requestor** username and/or **Purchase Request ID** and hit Enter or click the "Search" button at the bottom of the screen. *NOTE: all Keyword conditions must be "True" to retrieve a document. The fewer keywords filled in, the better chance of matching documents. More is NOT better in this case. Do not try to fill all the keywords in.*

4. Documents that match your query will display in the Document Search Results window. If only one document is found, it will open on the bottom part of the window.

5. If multiple documents are found double-click to an item in the document list to open the Purchase Request document.

6. Check the status of the Purchase Request by examining the approval fields in the lower right corner of the document.

7. When finished log out by clicking the down arrow to the right of your name in the upper right corner of the window and click Logout

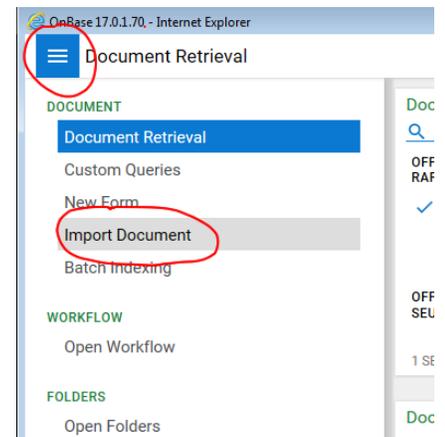


To Import Purchase Request Supporting Documents

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



2. Click on the “hamburger menu” next to Document Retrieval and select “Import Document.”

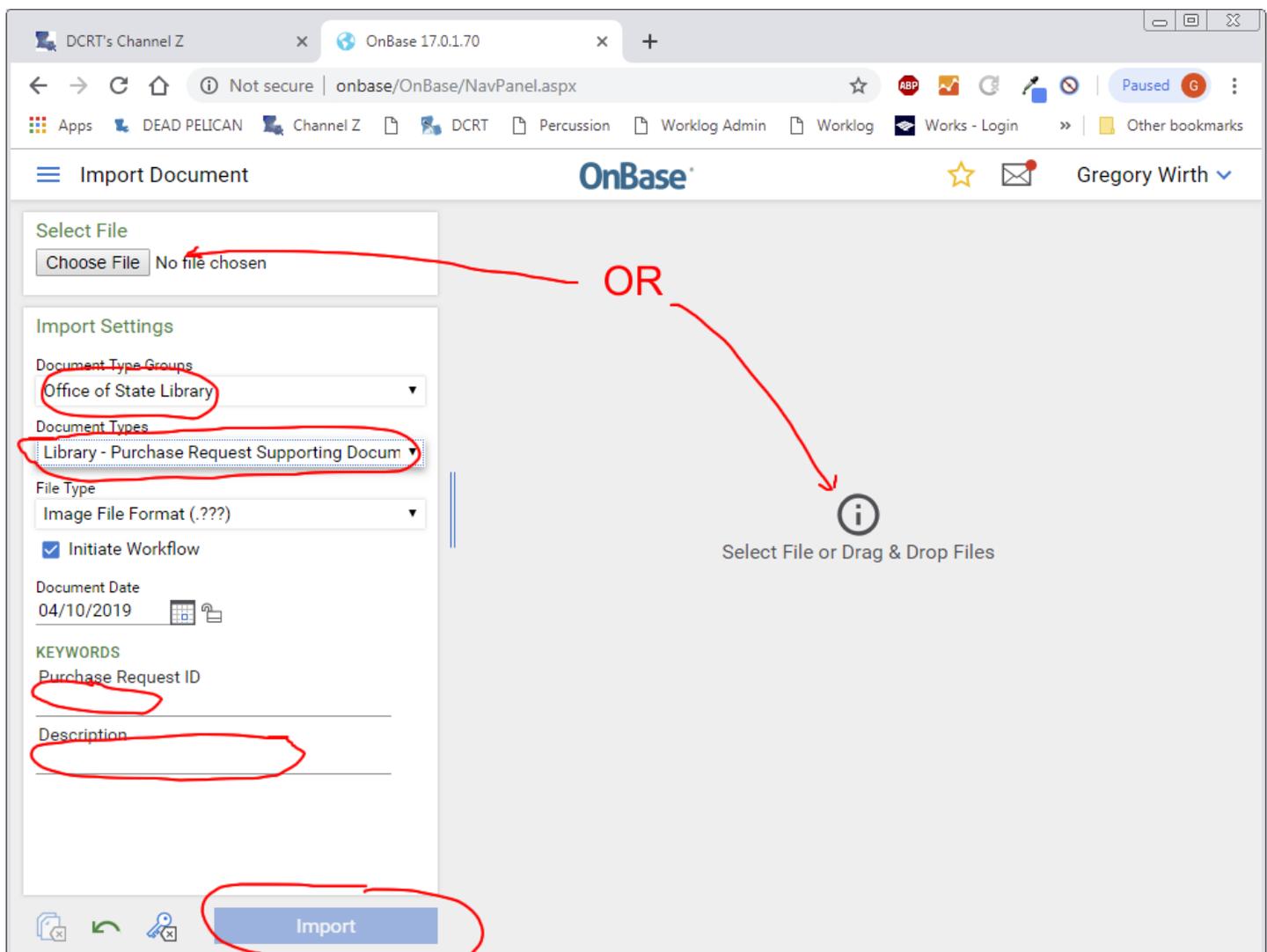


3. Click on Browse and navigate to the file you would like to attach and click on Open. OR – drag the file from the desktop or Windows file explorer window.

4. In the Document Type Groups section select Office of State Library

5. In the Document Types section select **Library-Purchase Request Supporting Documents**.

6. Enter the **Purchase Request ID** and **Description** of the attached document.



7. Click on the Import button (bottom of window).
8. **Import Succeeded** should appear at the top of the screen.
9. To view the purchase request and related documents, click on the “hamburger menu” to the right of “Import Document” and select Document Retrieval, then follow the steps below on how **To View a Request for Purchase Document**.
10. Enter the Purchase Request ID number in the keyword field and hit Enter or click the Search button.
11. Right-click on the Request for Purchase form and click on **Cross-References** on the pop-up menu.
12. A list of documents related to the purchase request will appear. Double-click to open a document

To add a sticky note to a purchase request:

1. Follow the **To View a Request for Purchase Document**.
2. Right-click on the open Request for Purchase document (not in the list of documents) and select **Notes** and **Add Note**; click on **Sticky Note**, select OK.
3. Type in the white section of the note.
4. When done, close OnBase or perform your next document retrieval.

To approve or deny a Purchase Request in Work Flow

You will receive an email notification when a document enters your workflow queue

1. Launch OnBase

2. Click on the “hamburger menu” next to “Document Retrieval” and click on “Open Workflow.”

3. Click the down arrow to the left of “Library–Purchase Request” section, you will see your role, such as Library Budget or Library Asst. Sec. Click the “Folder” icon to view the documents in your queue

4. Select the appropriate purchase request document to open it in the bottom area of the window.

5. OPTIONAL: 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

6. Click on the icon to [Y] Approve or [N] Deny the request. *The document will disappear from your queue once it is approved or denied.*

7. When done, close the Workflow process window [X] and log out of OnBase.

