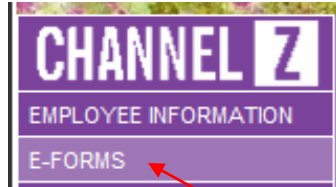


## Office of Cultural Development Request for Purchase - OnBase User Guide

### 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:  
**Office of Cultural Development Request for Purchase -OnBase Workflow Form**
3. The **Purchase Request** form opens with the following information completed: **Requested by**, **Request date**, **Purchase Request ID** and **Deliver To**

**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**.

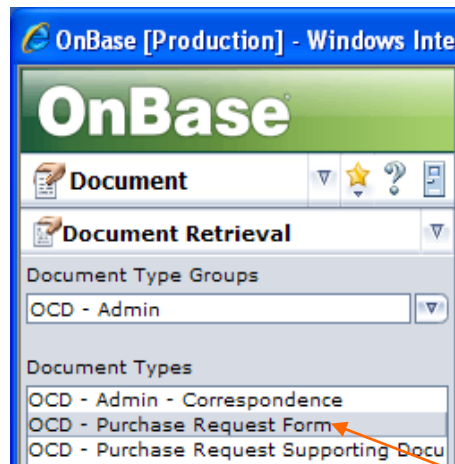
4. Complete the following **required** information:
  - a. Title Keyword- used for the description of the purchase, such as Office Supplies
  - b. Type of Purchase – P-Card or Purchase Order
  - c. Description, Item number, Quantity, Unit and Unit Cost
5. Complete the following **optional** information:
  - a. Suggested Vendor (Important if a PO is to be generated)
  - b. Desired Delivery Date and Purpose/Comment section
6. When done, click on **Update Total** and make sure **Total Cost** appears and before clicking on **Submit Form**, click anywhere else on the form other than the last numeric field **to ensure all fields have been totaled**.
7. After clicking on **Submit Form**, click on **Yes** to close the window. Follow the steps below to view the **Purchase Request document in OnBase**.

### To retrieve a Purchase Request document:

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




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



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

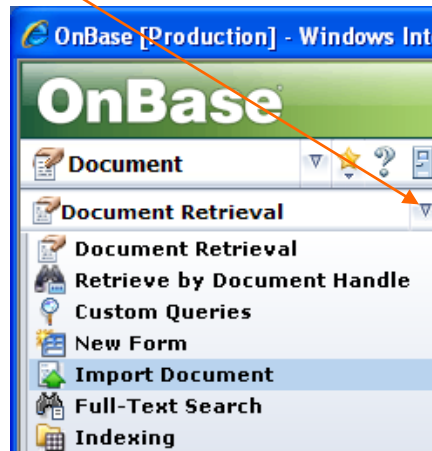



click on the **Binoculars** at the bottom of the screen.

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:

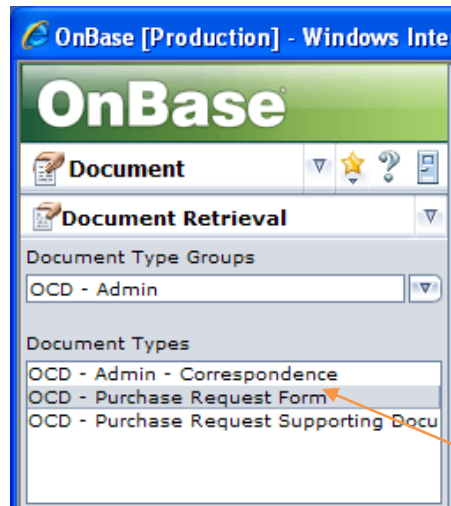
1. Click on the **OnBase** icon located on the ChannelZ page
2. Click on the down arrow next to **Document Retrieval** and select **Import Document**



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 **OCD-Admin**, in the **Document Types** section select **OCD-Purchase Request Supporting Document**
5. Enter the **Purchase request ID#** and click on the **Import** icon  at the bottom of the screen.
6. **Import Succeeded** should appear at the top of the screen.
7. 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 **OCD-ADMIN**
2. In the **Document Types** section, click on **OCD-Purchase Request Form**



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.
6. Double-click to open a document

### To add a sticky note:

1. Click on the **OnBase** icon located on the ChannelZ website
2. In the **Document Types** section, click on **OCD-Purchase Request Form**
3. Enter the **appropriate keywords** and hit **Enter** or click on the **Binoculars**
4. Double-click to open the Purchase Request document
5. Right-click on the **Request for Purchase** document and select **Notes and Add Note**
6. Click on **Sticky Note**, select **OK**
7. Type in the white section of the note
8. Click on the 'x' to delete the **Sticky Note** or when done, close OnBase

DCRT - Office of Cultural Development  
**Request for Purchase**

Requested by:	Request Date:	Title Keyword:	Purchase Order #:	Purchase Request ID:
ABORDELON	04/19/2012	TAX CREDIT BOOKLET PRINTIN		123

Deliver to:

DCRT-Office of Cultural Development  
Capitol Annex Building Room 405  
1051 N 3rd Street  
Baton Rouge, LA 70802

Suggested Vendor:

DiggyPod.com

Type of Purchase: PURCHASE ORDER Fiscal Year: Desired Delivery Date: 05/04/12

Class Description/Specifications	Item Number	Quantity	Unit	Unit Cost	Extended Cost
1 Booklet Printing at 100 units		1	Set	552.40	552.40
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0

Purpose/Comments/Special Instructions

See attached/uploaded printing quotes from DiggyPod (\$552.40); Colorwise Commercial Printing (\$862); and, InstantPublisher.com (\$559). We recommend going with DiggyPod due to the low price quote. Shipping costs may be extra. These booklets are essential to assist applicants with the federal- and state-mandated tax credit programs

**TOTAL COST**  
Submit Form \$552.40

Supervisor Approval

OCD-ADMINISTRATION Volume 1 Copy 1 Checked Out 1 Note(s)  
For Help, press F1