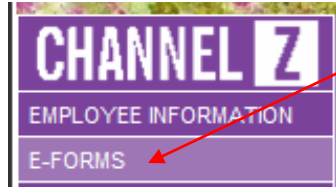## Office of Management & Finance Request for Purchase - OnBase User Guide

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 Management & Finance 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 **OMF - Purchase Request Form**
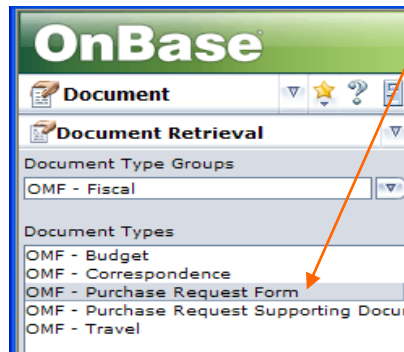
3. In the **Keywords** section, type the appropriate **keyword** value, such as the **Requestor Name** and/or **Purchase Request ID** and hit **Enter** or click on the **Binoculars** at the bottom of the screen.

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.

**<u>To attach a related document to a Purchase Request:</u>**

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**
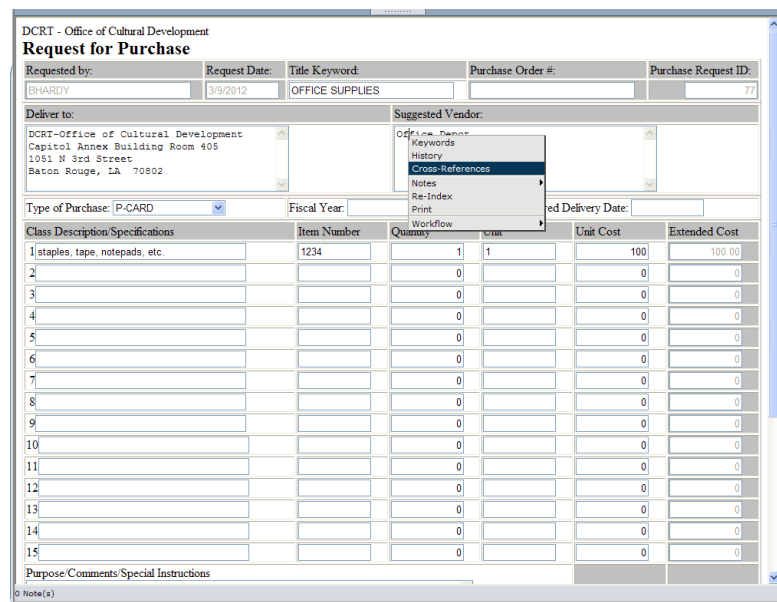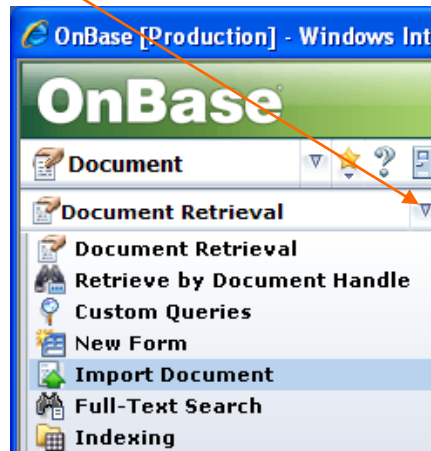

3. Click on **Browse** and navigate to the file you would like to attach and click on **Open**.

4. In the **Document Type Groups** section select **OMF-Fiscal**

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

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 **OMF-Fiscal**

2. In the **Document Types** section click on **OMF-Purchase Request Form**
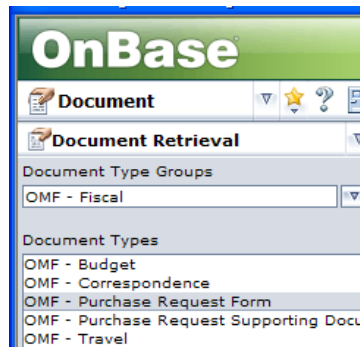
3. Enter the **Purchase Request ID #** and hit **Enter** or click on the **Binoculars**

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. Double-click to open a document

Steps to add a sticky note to a purchase request:

1. In the **Document Types** section**,** click on **OMF-Purchase Request Form;** 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

DCRT - Office of Management & Finance
Request for Purchase

Requested by:	Request Date:	Requisition #:		Purchase Order #:		Purchase Request ID:
JDENNIES	4/18/2012					2108

Deliver to:

1051 N3rd Street
Capital Annex suite 244
Baton Rouge, La 70804

Suggested Vendor:

LCPA
2400 Veterans Blvd
Kenner, La 70062

Type of Purchase: Purchase Order ▼   Desired Delivery Date: _____

Class De		Item Number	Quantity	Unit	Unit Cost	Extended Cost
1 Fornes	Sticky Note - 4/25/2012 - Bridgette K. Hardy	1	1	EA	236	236.00
2 AICPA	X BHARDY 4/25/2012 9:24:29 AM	1	1	EA	236	236
3 REVIS	Example of a sticky note	1	1	EA	266	266.00
4 TESTIN		1	1	EA	266	266
5 ADVAI		1	1	EA	276	276.00
6			0		0	0
7			0		0	0
8			0		0	0
9			0		0	0
10			0		0	0
11			0		0	0
12			0		0	0
13			0		0	0
14			0		0	0
15			0		0	0

Purpose/Comments/Special Instructions

0 Note(s)

Note: Click on the 'x' to delete the Sticky Note