

Office of State Museum 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 (Onbase)** section, click on: **Office of State Museum Request for Purchase -OnBase Workflow Form**

E-forms

CHANNEL Z E-Forms for CRT		
EMPLOYEE INFORMATION		
E-FORMS		
CRT / OLG WEBSITES		
STATE WEB SITES		
INFORMATION SERVICES		
NEWS & MEDIA		
CALENDARS		
Webmail		
Phone List		
Major Menus		
OnBase		
Google		
2012 SUNSET REPORT		
STRATEGIC PLAN FY15-FY19		
Human Resources Forms		
HR Forms Webpage		click here
Letterhead for DCRT		
Electronic Letterhead (all Offices)		click here
Personnel and Pay Forms		
Time and Leave Form updated April 9, 2012		-
OSP Timesheet - 30 minute lunch updated April 13, 2015		-
OSP Timesheet - 60 minute lunch updated April 13, 201		-
DCRT Human Resources Forms		See HR Forms Page - Click here
Purchasing Request Authorization Forms (OnBase)		
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 Museum Request for Purchase	Onbase Workflow Form	Instructions

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, Work order ID and Purpose/Comment section

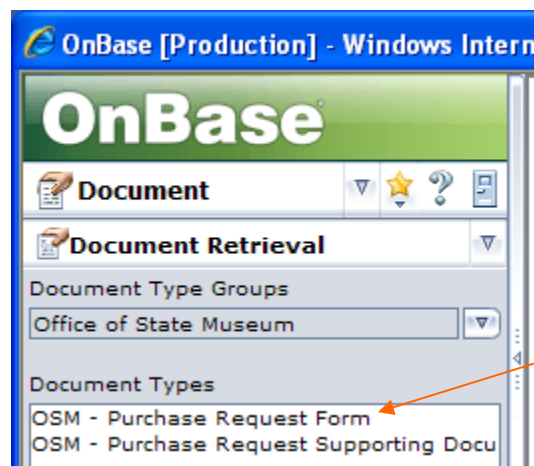
6. When done, click anywhere else on the form other than the last numeric field **to ensure all fields have been totaled** then click on **Submit Form**
7. After clicking on **Submit Form** a dialog box appears, click on **YES** to close the dialog box.
8. Follow the steps below to view\retrieve the **Request for Purchase document in OnBase.**


Note: Steps in the approval process

- Purchases <\$1000
 1. Supervisor approval
 2. Budget approval by Yvonne Mack
 3. Agency approval by Robert Wheat or Mark Tullos
- Purchases >\$1000
 1. Supervisor approval
 2. Budget approval by Yvonne Mack
 3. Agency approval by Robert Wheat or Mark Tullos
 4. OMF Budget approval by Vondrica Alexander

How to view/retrieve a Request for Purchase document:

1. Click on the **OnBase** icon located on the ChannelZ page
2. In the Document Type Group, make sure **Office of State Museum** is selected
3. In the **Document Types** section, click on **OSM - Purchase Request Form**



4. In the **Keywords** section, type the appropriate **keyword** value, such as the **Purchase Request ID** (if known), **Requestor Name**, **Purchase Type**, etc. and hit **Enter** or click on the **Binoculars**  at the bottom of the screen.

5. Documents that match your search query will display in the **Document Search Results** window.

6. **Double-click** to open a Purchase Request document.

7. 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 **Office of State Museum**, in the **Document Types** section select **OSM-Purchase Request Supporting Document**, file type and document date will automatically be entered
5. Enter the **Purchase request ID#** and **Description** of the document you are importing



6. Click on the **Import** icon at the bottom of the screen.
7. **Import Succeeded** should appear at the top of the screen.
8. 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\retrieve a Purchase Request and supporting document**.

To view/retrieve a Purchase Request and supporting document:

1. In the **Document Type Groups** section select **Office of State Museum**; in the **Document Types** section click on **OSM-Purchase Request Form**
2. Enter the **Purchase Request ID #** and hit **Enter** or click on the **Binoculars**
3. Right-click on the **Request for Purchase** form and click on **Cross-References**. A list of documents supporting the request for purchase will appear. Double-click to open a document

DCRT - Office of State Museum
Request for Purchase

Work Order ID: WW12-429

Requested by: GLACOSTE Request Date: 4/25/2012 Requisition #: Purchase Order #: Purchase Request ID: 1507

Deliver to: Louisiana State Museum - Patterson Suggested Vendor: Wal-Mart Bayou Vista, LA

Type of Purchase: P-Card Desired Delivery Date: 5/1/12

Class Description/Specifications	Item Number	Quantity	Unit	Unit Cost	Extended Cost
1 Ratchet Straps		2	Pk.	20.88	41.76
2 Bungee Cords Value Pk.		1	Pk.	9.98	9.98
3 Utility Knife		3	Ea.	9.00	27.00
4 Distilled Water		5	Gal.	1.00	5.00
5				0	0
6				0	0
7				0	0
8				0	0
9				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

0 Note(s)

Steps to add a sticky note to a purchase request:

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

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5		0		0	0
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

0 Note(s)

Sticky Note - 4/30/2012 - Bridgette K. Hardy
X BHARDY 4/30/2012 11:01:07 AM
This is an example of a sticky note

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