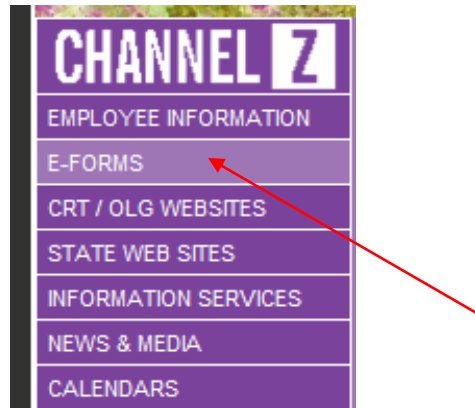


Office of State Parks - Request for Purchase - OnBase User Guide

To create a Purchase Request:

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



3. In the **Purchasing Forms** section, click on:
Office of State Parks Request for Purchase -OnBase Workflow Form.
4. The **Purchase Request** form opens with the following information completed: **Requested by, Request date, Purchase Request ID, Deliver To, Park Site, and Fiscal Year**

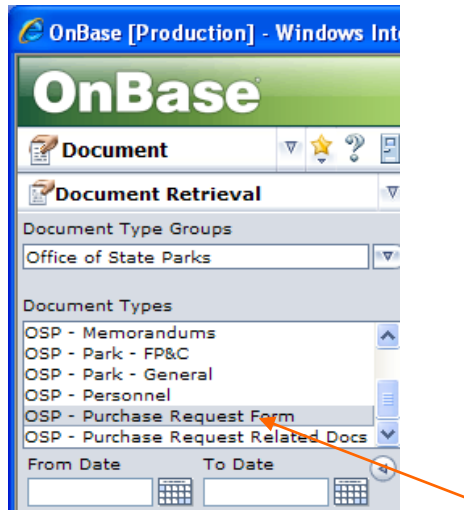
Note: It's a good idea to make note of the "**Purchase Request ID**" which can be used when retrieving and/or importing related documents to your Purchase request.

5. Complete the following **required** information:
 - a. Budget Coding - select the appropriate category from the drop down list
 - b. Purchase Payment
 - c. Description, Object Code, Quantity, Unit and Unit Cost
 - d. Key Words – used for a description of the purchase, such as Calendars, Lawn Mower, Maintenance supplies, Office Supplies, etc.

6. Complete the following **optional** information:
 - a. Park Requisition #
 - b. Invoice To (Important if a PO is to be generated)
 - c. Suggested Vendor (Important if a PO is to be generated)
 - d. Desired Delivery Date
 - e. Purpose/Comment section
7. When done, 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.**
8. After clicking on **Submit Form**, you can view the purchase request by following the steps below on **How to Retrieve a Purchase Request document**

To retrieve a Purchase Request document:


1. Click on the **OnBase** icon located on the ChannelZ website
2. In the **Document Types** section, click on **OSP - 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

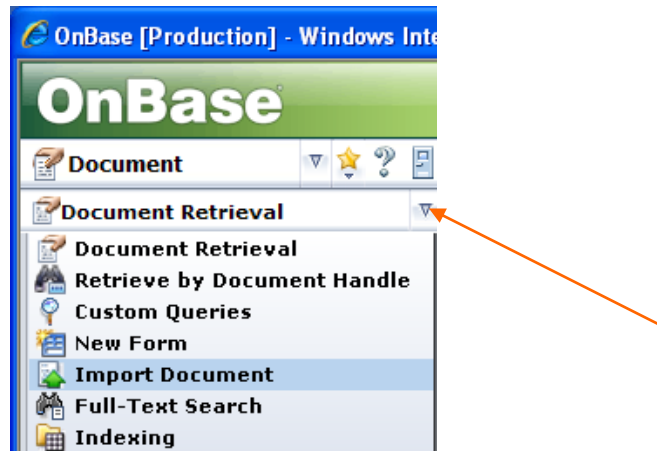


click on the **Binoculars** at the bottom of the screen.

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 website
2. Click on the down arrow next to **Document Retrieval** and select **Import Document**



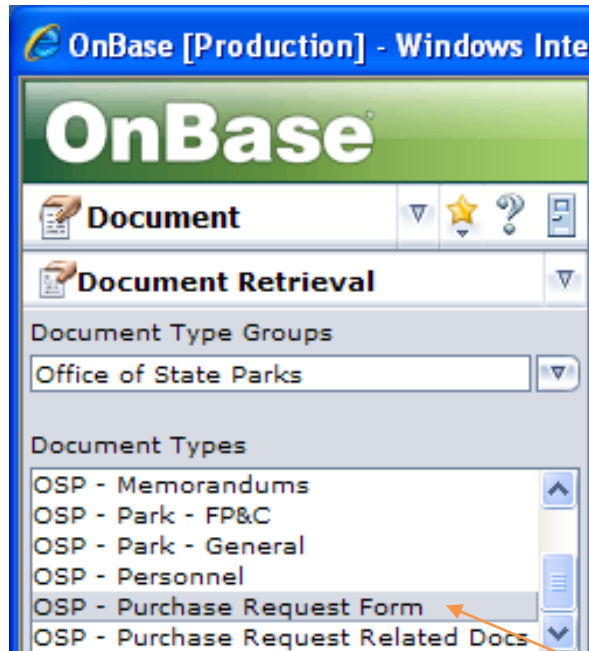
3. Click on **Browse** and navigate to the file you would like to attach and click on **Open**.
4. In the Document Types section, click on **OSP-Purchase Request Related Document**
5. Complete the **required** information pertaining to the request.
Purchase Request ID and **Description**.



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 a Purchase Request and related document**.

To view a Purchase Request and related document:

1. In the **Document Type Groups** section make sure **Office of State Parks** is selected
2. In the **Document Types** section, click on **OSP-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 **OSP-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

Request for Purchase Authorization						
Requested by:	Request Date:	Park Req #:	Purchase Order #:	Purchase Request ID:		
SBROUSSARD	9/29/2011			1251		
Deliver to:	Invoice to:	Suggested Vendor:		Budget Coding:		
LA Office of State Parks Capitol Annex Rm 304 1051 N 3rd St Baton Rouge, LA 70802		LA Post/Quantum Video		Org #	6461	
				Obj #	4150	
				Rep Cat #	4251	
Site: Parks HQ	Fiscal Year: FY2011-12	Purchase Payment: P-Card	Desired Delivery Date:			
Description	Item Number	Quantity	Unit (each, box, carton)	Unit Cost	Extended Cost	
1 Video dub set-up		1	each	\$ 35	\$ 35.00	
2 Copies of video, including labels and sleeves		5	each	\$ 4.15	\$ 20.75	
3		0		\$ 0	\$ 0	
4		0		\$ 0	\$ 0	
5		0		\$ 0	\$ 0.00	
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	
Form Tag: VIDEO DUPLICATION				TOTAL COST \$ 55.75		
Purpose/Comments/Special Instructions				Submit Form		
Marksville SHS needs fresh copy of introductory video. This is a brand-new dub.				Park Manager Approval LIMIT BYPASS		
				District Manager Approval LIMIT BYPASS		
				Section Head Approval SELF APPROVED		
0 Note(s)						

Requested by: AUDUBONMGR		Request Date: 1/10/2012	Park Req #: AUD12-81	Purchase Order #:	Purchase Request ID: 3849
Deliver to: Audubon SHS & Locust Grove 11788 La. Hwy 965 St. Francisville, LA 70775		Invoice to: Same	Suggested Vendor: Dell		Budget Coding: Org # 6463 Cat. SUPPLIES Rep Cat # 4214
Site: Audubon	Fiscal Year: FY2011-12	Purchase Payment: P-CARD/LDO	Desired Delivery Date: ASAP		

Description	Obj. Code	Quantity	Unit (each, box, carton)	Unit Cost	Extended Cost
1 Printer Cartridge	3100	1	1	\$ 189.51	\$ 189.51
2		0		\$ 0	\$ 0
3		0		\$ 0	\$ 0
4		0		\$ 0	\$ 0
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	\$ 0.00
12		0		\$ 0	\$ 0

Form Tag: OFFICE SUPPLIES
 Purpose/Comments/Special Instructions
 Printer Cartridge for sole printer on site. Old catridge is totally out and nothing paperwork wise can be done.

TOTAL COST
 \$ 189.51
 Submit Form

Park Manager Approval
 SELF APPROVED 1/10/2
 District Manager Approval
 APPROVED UNDER LIM
 Section Head Approval
 APPROVED UNDER LIM
 Parks HQ Budget Approval
 APPROVED UNDER LIM
 Agency Approval

0 Note(s)

Approved Purchase Request

Requested by:	Request Date:	Park Req #:	Purchase Order #:	Purchase Request ID:
AUDUBONMGR	12/17/2011	AUD12-69		3391

Deliver to:	Invoice to:	Suggested Vendor:	Budget Coding:
Audubon SHS & Locust Grove 11788 La. Hwy 965 St. Francisville, LA 70775	Same	C&D Jarnigan	Org # 6463 Cat. SUPPLIES Rep Cat # 4214

Site: Audubon	Fiscal Year: FY2011-12	Purchase Payment: P-CARD/LDO	Desired Delivery Date: ASAP
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Description	Obj. Code	Quantity	Unit (each, box, carton)	Unit Cost	Extended Cost
1 4160 1812 Jacket	1	1	1	\$ 720.00	\$ 720.00
2		0		\$ 0	\$ 0
3		0		\$ 0	\$ 0
4		0		\$ 0	\$ 0
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

Form Tag: 4160 1812 JACKET FOR PROGRAM	TOTAL COST
Purpose/Comments/Special Instructions	\$ 720.00
4160 1812 Jacket for programs	Submit Form

Park Manager Approval
SELF APPROVED 12/17/
District Manager Approval
DIST. MGR. DENIED 12/2
Section Head Approval
PENDING

0 Note(s)

Denied Purchase Request