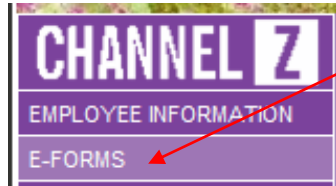


Office of Tourism Request for Purchase - OnBase User Guide

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 Tourism 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**.

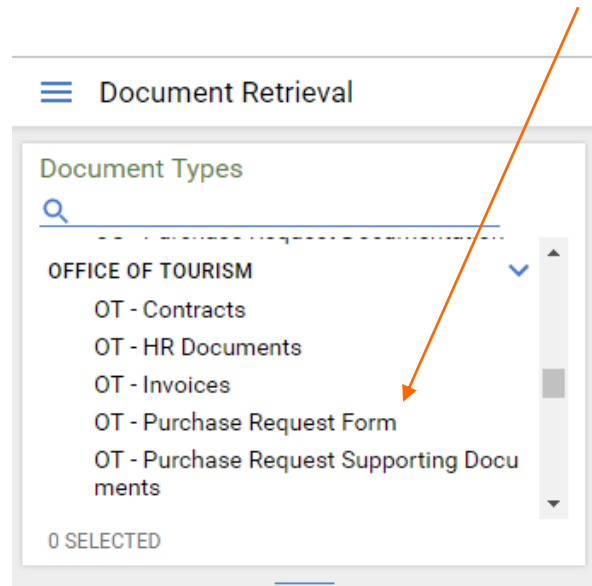
4. Complete the following **required** information:
 - a. Deliver to and Type of Purchase (P-Card or Purchase Order)
 - b. Description, Item number, Quantity, Unit and Unit Cost
5. Complete the following **optional** information:
 - a. Suggested Vendor (Important if a PO is to be generated)
 - b. Desired 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 **OT - Purchase Request Form**



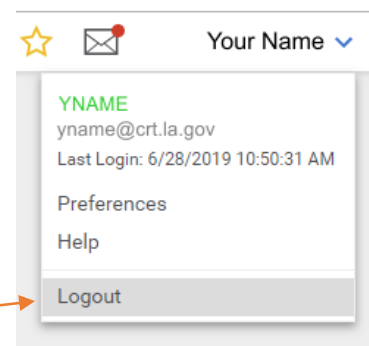
3. In the **Keywords** section, type the appropriate **keyword** value, such as the **Requestor Name** and/or **Purchase Request ID** and hit **Enter** or

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


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

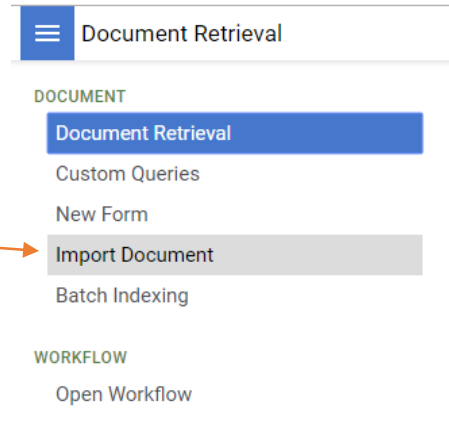
5. **Double-click** the item in the list to open the Purchase Request document. Check the status of the Purchase Request.

6. Log out by clicking the down arrow next to your name in the upper right area of the window and select Logout .

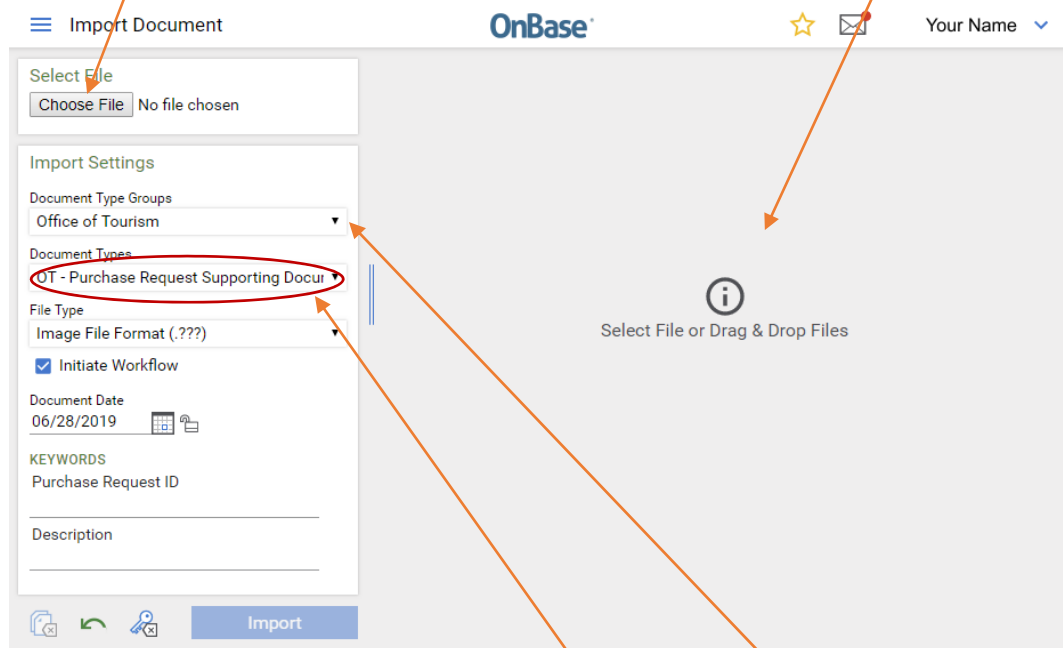


To attach a related document to a Purchase Request:

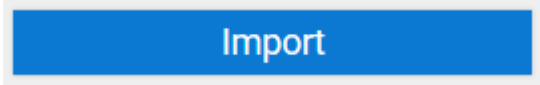
1. Click on the menu button  next to **Document Retrieval** and select **Import Document**



2. Click on **Choose File** and navigate to file you would like to attach and click on **Open** or drag and drop the file from your desktop or file explorer window onto the designated area of the browser window.



3. In the **Document Type Groups** section select **Office of Tourism**, in the **Document Types** section select **OT-Purchase Request Supporting Document**. (*Attached documents are not the same as Purchase Request forms!*)

4. Enter the **Purchase request ID#** and **Description** of the document you are importing. The description should be short and specific – like QUOTE or BID or INVOICE.
5. Click on the **Import** button
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 Types** section select **Office of Tourism** and **OT-Purchase Request Form**.
2. Enter the **Purchase Request ID #** and hit **Enter** or click on the **Search** button.
3. Right-click on the **Request for Purchase** form and click on **Cross-References**.
4. A list of documents related to the purchase request will appear. Double-click to open a document

Document Retrieval

OnBase

Document Types

OFFICE OF TOURISM

- OT - Contracts
- OT - HR Documents
- OT - Invoices
- ☒ OT - Purchase Request Form
- OT - Purchase Request Supporting Documents

1 SELECTED

Document Date

Search Type

KEYWORDS TEXT NOTES

Purchase Request ID

Requestor

Description

Approval Status

Date Request

Full-Text Search

Search

Document Retrieval

OnBase

Document Search Results

Drag a column header here to group by that column.

DOCUMENT NAME	DOCUMENT DATE
OT - Purchase Request Form - 7107 - Requested by: GBWIRTH on 6/17/2019 - Total Cost: \$1,878.00 - APPROVED	6/17/2019
OT - Purchase Request Form - 7106 - Requested by: GBWIRTH on 6/17/2019 - Total Cost: \$2,949.55 - APPROVED	6/17/2019
OT - Purchase Request Form - 7049 - Requested by: GBWIRTH on 6/17/2019 - Total Cost: \$1,878.00 - APPROVED	6/17/2019

Items: 50

Request for Purchase

Requested by: GBWIRTH

Request Date: 6/17/2019

Deliver to: electronic renewal of service

Type of Purchase: Purchase Order

Class Description/Specifications

1	2	3	4
Adobe Creative Cloud for Teams renewal			

1 Note(s)

Keywords

History

Cross-References

Notes

Re-Index

Print

Delete Document

Workflow

Properties

Previous Document

Next Document

Delivery Date:

Quantity

Unit Price

Amount

Steps to add a sticky note to a purchase request:

1. In the **Document Types** section, click on **OT-Purchase Request Form**; enter the **appropriate keywords** and hit **Enter** or click on the **Search button**
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 Tourism
Request for Purchase

Requested by:	Request Date:	Requisition #:	Purchase Order #:	Purchase Request ID:
VLEWIS	4/28/2011			3307

Deliver to: LA Office of Tourism

Suggested Vendor: Office Depot

Type of Purchase: P-Card

Desired Delivery Date:

Class Description/Specifications	Quantity	Unit	Unit Cost	Extended Cost
1 pack of 72 pencils	1	ea	5.99	5.99
2 pencil bags	20	ea	1.99	39.80
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
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