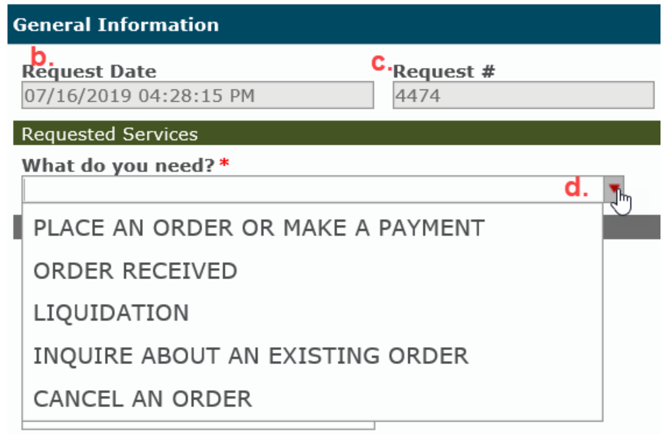
# Quick Start Guide: Ordering/Payment Request Form

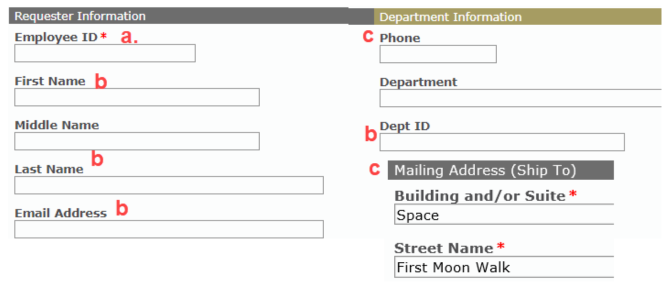
## 1. Log in to the OnBase form

a. Using Google Chrome Click the link found here.
b. Request Date is the form initiation date and is auto-populated.
c. An OnBase request number is automatically assigned.
d. Select what is needed in the drop-down list.



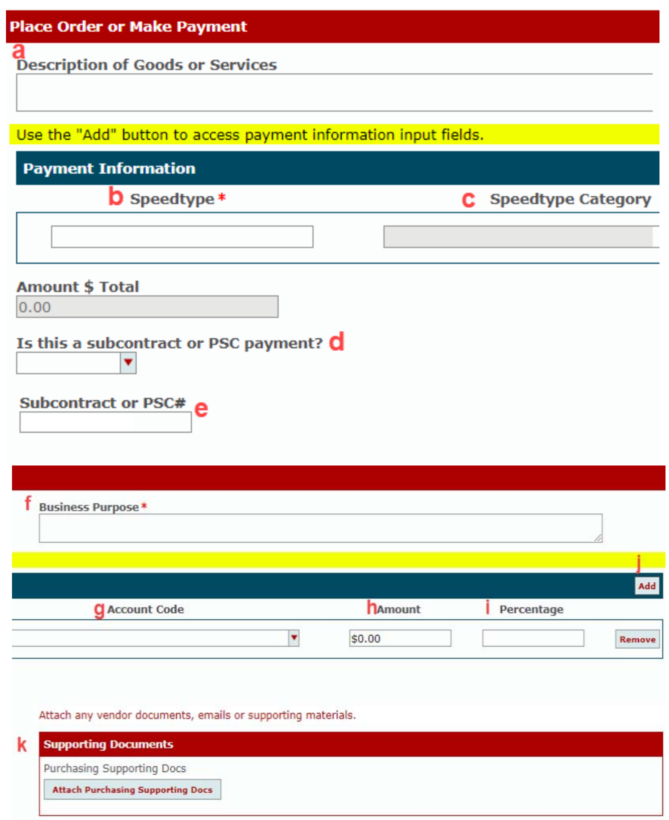

## 2. Demographic Information

a. Type in your employee ID number then click the Tab key.
b. Name, university e-mail address and department will automatically populate.
c. Enter your phone number and mailing address.




## 3. Place or Order or Make a Payment

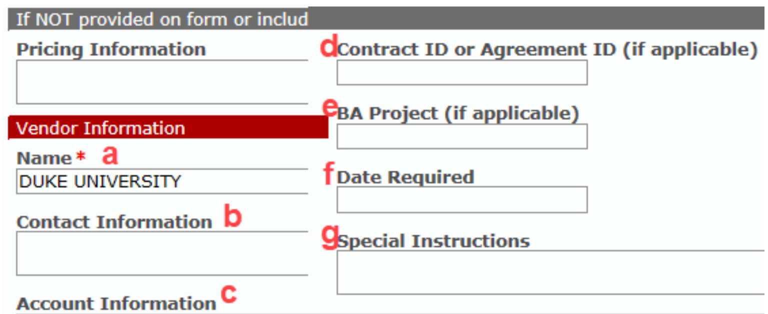
a. Description of Goods or Services – what is being procured and/or paid.
b. Speedtype - the speedtype where the goods or services will be charged.
c. Speedtype Category – field is auto-populated based on speedtype. If field does not populate then validate speedtype.
d. Are the goods or services being procured on a subcontract or a PSC? If so, select “Yes” from the drop-down.
e. Enter the PSC or subcontract number in the space provided.
f. Business Purpose – the reason for the purchase. This field will appear on the BA reconciliation financial statements.
g. Account Code – suggested account code for the goods or services. This field can be left blank. (optional)
h. Amount – dollar amount of purchase.
i. Percentage – Optional field if the charge will be split between multiple speedtypes or account codes.



j. Click “Add” to add additional distribution lines to split charges.
k. Supporting Documents – attach any supporting documentation for the purchase. Multiple attachments can be uploaded.

## 4. Vendor Information

a. Vendor name.
b. Vendor contact information (optional).
c. Account Information (optional).
d. Contract ID or Agreement ID if the goods or services require a contract or department agreement.
e. BA project (optional).
f. Date required (optional).
g. Special Instructions (optional).




## 5. Communications

a. E-mail notifications are sent directly from OnBase. They are sent when:
   i. Order/Payment Request is received
   ii. Order/Payment Request is processed
   iii. Order/Payment Request is complete
   iv. If an Order/Payment Request is processed using a Purchase Order (PO) that has not been received e-mails will be sent out weekly reminding the customer to update Business Ops through the form when the order has been received
b. To view the form attached to the e-mails click the attachment one time in the e-mail. Double clicking the attachment may result in only being able to see the first page.