

Quick Start Guide: Ordering/Payment Request Form

1. Log in to the OnBase form

- Using Google Chrome Click the link found [here](#).
- Request Date is the form initiation date and is auto-populated.
- An OnBase request number is automatically assigned.
- Select what is needed in the drop-down list.

2. Demographic Information

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

3. Place or Order or Make a Payment

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

General Information

b. Request Date: 07/16/2019 04:28:15 PM **c.** Request #: 4474

Requested Services

What do you need? *

- PLACE AN ORDER OR MAKE A PAYMENT **d.**
- ORDER RECEIVED
- LIQUIDATION
- INQUIRE ABOUT AN EXISTING ORDER
- CANCEL AN ORDER

Requester Information	Department Information
Employee ID * a.	c. Phone
First Name b.	Department
Middle Name	b. Dept ID
Last Name b.	c. Mailing Address (Ship To)
Email Address b.	Building and/or Suite *
	Space
	Street Name *
	First Moon Walk

Place Order or Make Payment

a. Description of Goods or Services

Use the "Add" button to access payment information input fields.

Payment Information

b. Speedtype * **c.** Speedtype Category

Amount \$ Total: 0.00

Is this a subcontract or PSC payment? **d.**

Subcontract or PSC# **e.**

f. Business Purpose *

Use the "Add" button to access payment information input fields.

g Account Code	h Amount	i Percentage	
	\$0.00		Remove

Attach any vendor documents, emails or supporting materials.

k Supporting Documents

Purchasing Supporting Docs

Attach Purchasing Supporting Docs

Business Operations

- 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).

If NOT provided on form or include	
Pricing Information	d Contract ID or Agreement ID (if applicable)
<input type="text"/>	<input type="text"/>
Vendor Information	e BA Project (if applicable)
Name * a	<input type="text"/>
DUKE UNIVERSITY	f Date Required
Contact Information b	<input type="text"/>
<input type="text"/>	g Special Instructions
<input type="text"/>	<input type="text"/>
Account Information c	
<input type="text"/>	

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.

