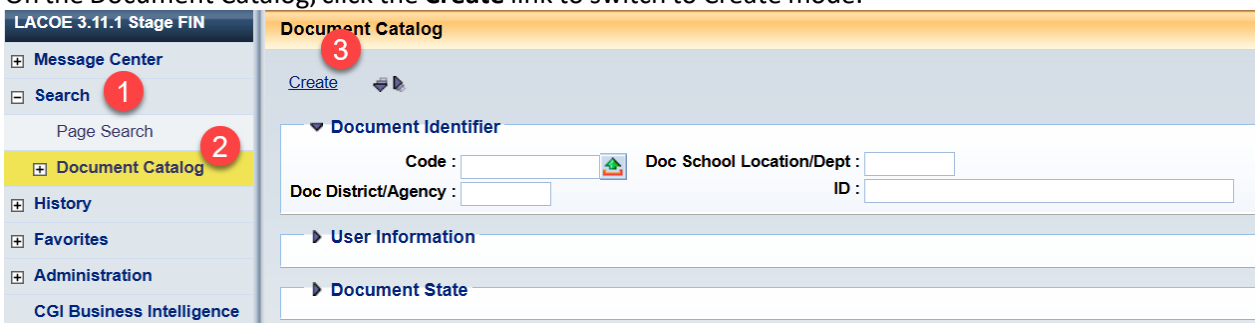
Division of School Financial Services

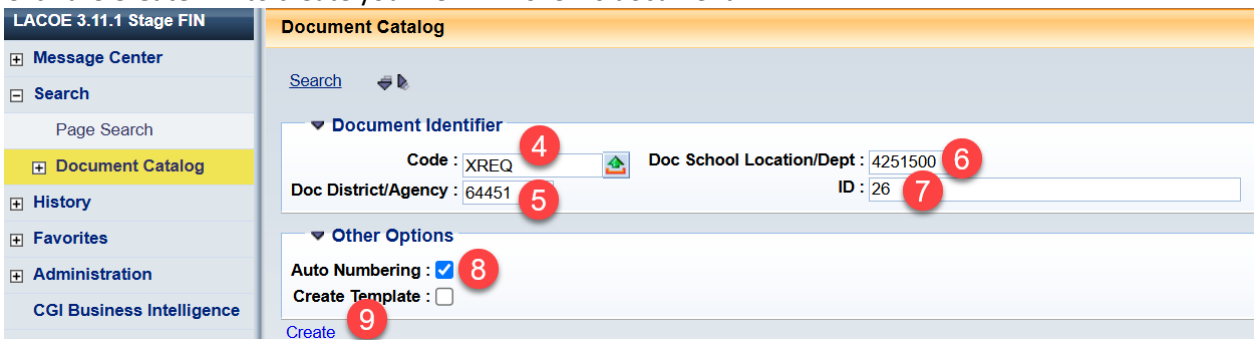
Creating a Procurement Document for Fiscal Year 2025-26 Before July 1, 2025

Log in to BEST Advantage – Financial (FIN)

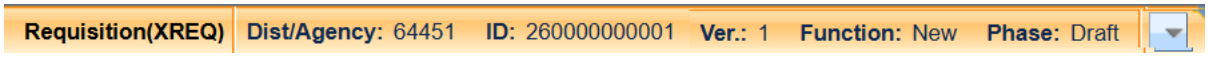
1. Click **Search** on the Secondary Navigation Panel.
2. Click **Document Catalog** to open the Document Catalog.
3. On the Document Catalog, click the **Create** link to switch to Create mode.



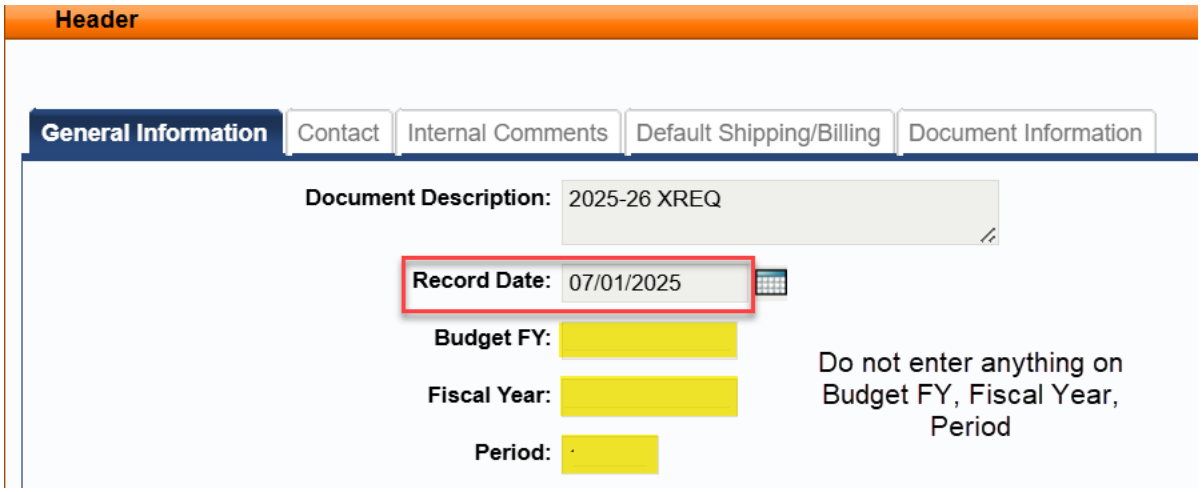
4. Enter the document code on the **Code** field, i.e., "XREQ", "PO1", PO2W, or "PO3W"
5. Your district/agency code should default in the **Doc District/Agency** field
6. In the **Doc School Location/Dept** field, enter the School Location/Department code
   NOTE: If you are unsure of the School Location/Dept to be used, please check with your Purchasing Department or Agency Business Office. This School Location/Dept is critical in determining the appropriate workflow approval routing for the procurement document.
7. In the **ID** field, enter "**26**" to indicate that the document is being created for FY 2025-26.
   NOTE: Entering the prefix of "26" will ensure that you will be able to locate the document when you search for FY 2025-26 documents later on using the "*" wildcard.
8. The **Auto Numbering** checkbox should already default as 'Checked'.
9. Click the **Create** link to create your new FY 2025-26 document.



10. Your document will be created in "**Draft**" phase. Ensure that your Document ID starts with "**26**" to indicate that this document is for FY 2025-26.

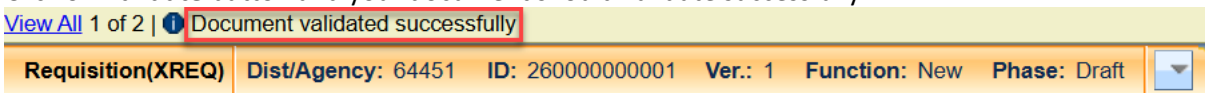


11. Enter **7/1/2025** in the **Record Date** field of the General Information tab of the Header component. This is critical for the system to post the document to FY 2025-26. **Do not enter anything on Budget FY, Fiscal Year and Period. Leave these fields blank.**



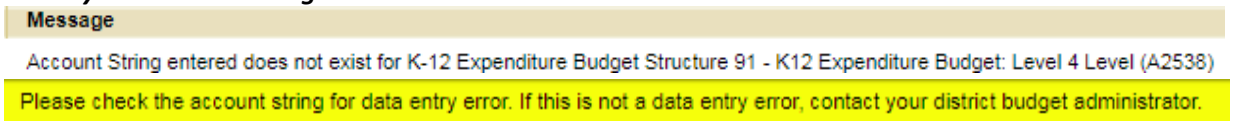
Continue completing your document.

Click on **Validate** button and your document should validate successfully.

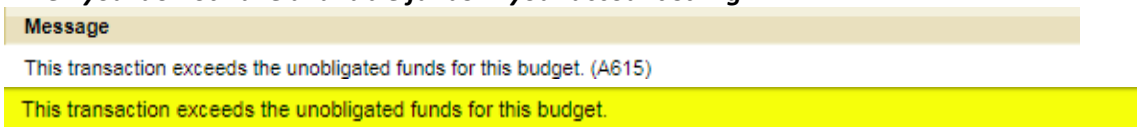


If your document does not successfully validate and you receive an error message(s) related to budget availability, please contact your Budget or Fiscal Department. Examples of common budget errors are:

When your account string does not exist:

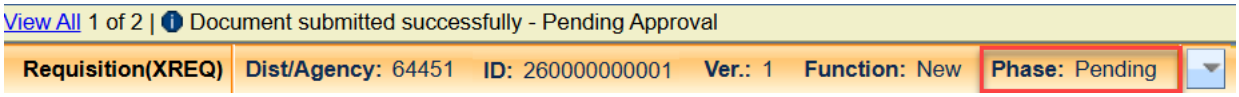


When you do not have available funds in your account string:

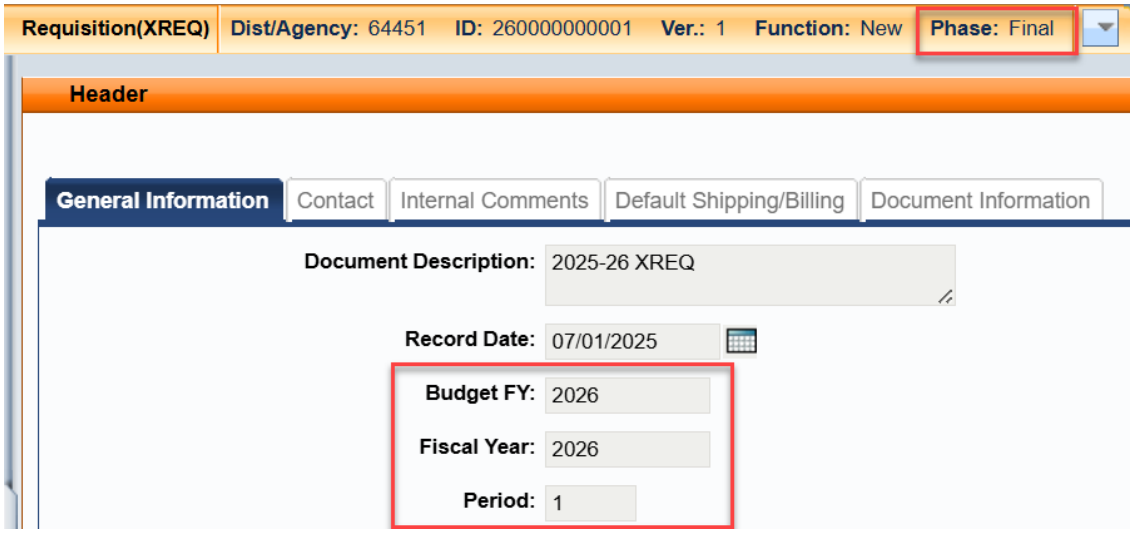


If your document does not successfully validate due to an error(s) not related to budget availability, please contact the BEST HelpDesk at (562) 922-8888 or via email at HelpDesk@lacoe.edu.

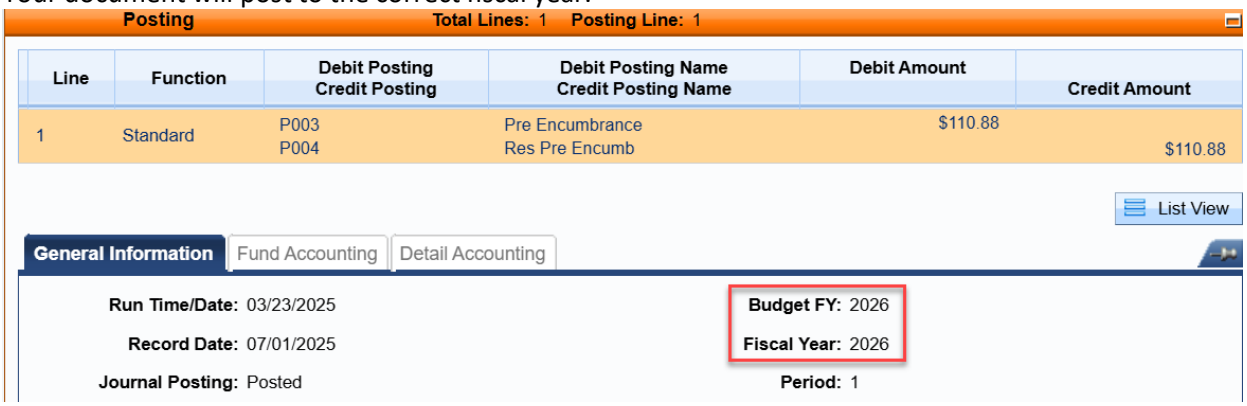
Once your document successfully validates, click on **Submit** to send your document for approval. The document would now be in "**Pending**" phase (routed for electronic approval).



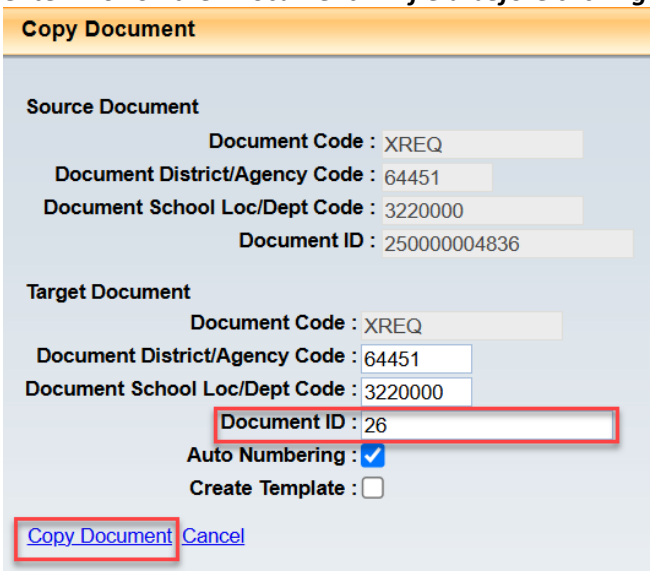
Once your document is approved and is in "**Final**" phase, the system will automatically populate the "Budget FY", "Fiscal Year" and "Period" fields on the General Information tab of the Header section.



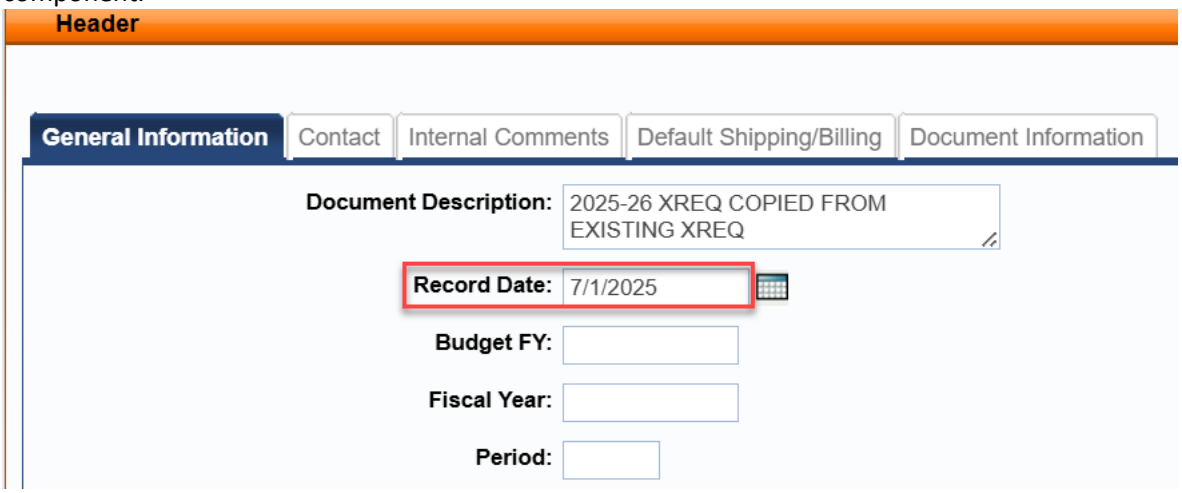
Your document will post to the correct fiscal year.



If you intend to create a FY 2025-26 document by copying an existing document, remember to enter "26" on the "Document ID" field before clicking on "Copy Document".



Similarly, enter 7/1/2025 on the **Record Date** field of the General Information tab of the Header component.



Note: *Entering "26" on the "Document ID" field and "7/1/2025" on the "Record Date" field* ***will not be necessary starting July 1, 2025****. System settings will number all documents created on or after 7/01/2025 to start with "26" and "Record Date" to be populated with the actual date when the document is updated to "****Final****" phase.*