

STEP TO STEP GUIDE

Entering a Requisition into BEST (from the CUSD Purchasing Department)

Go to **Page Search**, in the **Page Code** section, type: **XREQ**, then click the [Requisition](#) hyperlink down below

The screenshot shows the 'Page Search' section of the CGI Advantage system. The left sidebar contains a navigation menu with options: Message Center, Search, Page Search (highlighted), Document Catalog, History, Favorites, Administration, and CGI Business Intelligence. The main content area is titled 'Page Search' and contains search filters: Category (dropdown), Page Type (dropdown), Description (text input), and Page Code (text input with 'XREQ*'). Below these are 'Browse' and 'Clear' links. A table displays search results with columns 'Description' and 'Page Code'. The first result is 'Requisition' with page code 'XREQ', highlighted with a checkmark. Navigation links 'First', 'Prev', 'Next', and 'Last' are at the bottom of the results.

After you click the [Requisition](#) hyperlink, it will take you to a different page, **Document Catalog**

Enter CUSD's **Doc District/Agency** number: **73437**, and click the [Create](#) hyperlink

The screenshot shows the 'Document Catalog' page in the CGI Advantage system. The left sidebar is the same as the previous page. The main content area is titled 'Document Catalog' and includes a 'Create' link. Below this is the 'Document Identifier' section with fields for 'Code' (XREQ), 'Doc School Location/Dept' (empty), 'Doc District/Agency' (73437), and 'ID' (empty). There are also sections for 'User Information' and 'Document State'. At the bottom, there are links 'Open', 'Validate', 'Submit', and 'Copy'. A table with various columns (Code, Doc District/Agency, Doc School Location/Dept, ID, Comments, Version, Function, Phase, Status, Date, User ID, Amount, Active, Collaboration) is shown, along with pagination links 'First', 'Prev', 'Next', 'Last', 'Export to CSV', and 'Show Lines' (set to 40). A 'Menu' link is at the bottom left.

After you click the Create hyperlink, it will take you to a second Document Catalog page...

Be sure the following boxes are filled in before clicking the [Create](#) hyperlink

- ☐ Code: **XREQ**
- ☐ Doc District/Agency: **73437**
- ☐ Auto Numbering: is selected (leave Create Template blank, do not select!)
- ☐ Doc School Location/Dept: (7 digit number, usually ending in 4 zeros – find from supervisor or from budgeting dept)

CGI Advantage

Welcome, Kimberly Davila
LACOE 3.11.1 Production
FIN

Message Center
Search
Page Search
Document Catalog
History
Favorites
Administration
CGI Business Intelligence

Document Catalog

Search

Document Identifier

Code : XREQ Doc School Location/Dept :
Doc District/Agency : 73437 ID :

Other Options

Auto Numbering : ☒
Create Template : ☐

Create
Menu

After you click the [Create](#) hyperlink, it will take you to an entirely new page. This is your requisition, you are in!
Note: be sure to write the ID number down somewhere, that ID is your requisition number. i.e. ID 25-4281

CGI Advantage

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004281 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/07/2025

Header

General Information Contact Internal Comments Default Shipping/Billing Document Information

Document Description:

Record Date:

Budget FY:

Fiscal Year:

Period:

Total Tax Amount: \$0.00
Actual Amount: \$0.00
Closed Amount: \$0.00
Closed Date:
Open Amount: \$0.00
Ref Amount: \$0.00

Complete only the specified sections – leave all other sections blank.

It's important to keep certain sections empty to ensure proper processing by all departments involved. Providing more information than necessary may lead to errors in the requisition or issues when it reaches other departments.

HEADER – GENERAL INFORMATION SECTION

Document Description: type a quick summary of what your requisition is for, i.e. OFFICE SUPPLIES or CONSULTANT AGREEMENT WITH [VENDOR]....

TYPE IN ALL CAPS

CGI Advantage

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004281 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/07/2025

Header

General Information Contact Internal Comments Default Shipping/Billing Document Information

Document Description:

Record Date:

Budget FY:

Fiscal Year:

Period:

Total Tax Amount: \$0.00

Actual Amount: \$0.00

Closed Amount: \$0.00

Closed Date:

Open Amount: \$0.00

Ref Amount: \$0.00

LEAVE BLANK

Push the Save button on the bottom left after typing in the section, as most will auto generate throughout.

*next page to see snippet of the rest of the tabs

Header Section Tabs: General Information – Contact – Internal Comments – Default Shipping/Billing – Document Information

HEADER – CONTACT SECTION

The **Issuer ID** will auto generate, you must enter the **Requestor ID** then push the **SAVE** button on the bottom left. You can click the green up arrow to search for the person if you need to.

Suggested: Enter your supervisor's name, enter your name if you cannot find theirs.

The screenshot shows the 'Contact' tab selected in the 'Header' section. The 'Issuer ID' is populated with 'COM_KDAVILA'. Below it, the name 'Kimberly Davila' and phone number '310-639-4321' are displayed. The email 'kdavila@compton.k12.ca.us' is also shown. The 'Requestor ID' field is empty, and a green up arrow icon is circled in pink next to it. Below the 'Requestor ID' field are input fields for 'Name', 'Phone Number', and 'Email'.

HEADER – INTERNAL COMMENTS SECTION

Will present itself front and center to your Buyer. Feel free to leave 'internal' notes for any/all CUSD departments on the approval tree. But remember, we need all pertinent information typed into the Commodity section.

The screenshot shows the 'Internal Comments' tab selected in the 'Header' section. The 'Internal Comments' field is a large, empty text area for entering notes.

HEADER - DEFAULT SHIPPING SECTION

The **Default Shipping Location** is the CUSD Warehouse, which will automatically generate in the header section, as all products must be delivered there per CUSD policies and procedures, all products must be shipped to the Warehouse to ensure proper receiving, documentation, tagging, and inventory management.

If you have any questions regarding large deliveries, special deliveries, installation requirements, ask your Buyer or Purchasing Department on how to proceed.

If you submitting for a service, such as bus transportation, field trips, please enter your site as the shipping site on both the header and commodity lines.

Optional to enter Shipping Method, but you can leave blank, please leave the other two sections (dates) blank

***Important to leave blank as past dates can hinder the generation of the PO that will be processed against the requisition. Special Instructions to be entered into the Internal Comments section for all CUSD departments on the approval tree to see.**

CGI Advantage

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004282 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/07/2025

Header

General Information Contact Internal Comments **Default Shipping/Billing** Document Information

Shipping Location: COM777

Compton USD - Warehouse
(310)
723 S ALAMEDA STREET
BLDG - E
COMPTON
CA
90220
US

Shipping Method:

Free On Board:

Due Date:

REQUISITION TABS

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004282 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/07/2025

Header

General Information Contact Internal Comments Default Shipping/Billing Document Information

Document Description: OFFICE SUPPLIES

Record Date:

Budget FY:

Fiscal Year:

Period:

Total Tax Amount: \$0.00

Actual Amount: \$0.00

Closed Amount: \$0.00

Closed Date:

Open Amount: \$0.00

Ref Amount: \$0.00

Save Undo

Accounting Distribution	Total Lines: 0 Line: none Distribution %: none
Vendor	Vendor Customer: none Legal Name: none
Commodity	Total Lines: 0 Line Number: none Item Total Amount: none Open Amount: none
Accounting	Accounting Line: none Line Amount: none Line Open Amount: none
Posting	Total Lines: 0 Posting Line: none
Free Form Vendors	Total Lines: 0 Line Number: none Vendor Name: none

Copy Validate Submit Discard

Tabs in a requisition

Header

Accounting Distribution – use accounting distribution when you have multiple commodity lines and one accounting string. Complete all your commodity lines, then go to the tab and push the **Distribute Accounting Lines** button, bottom right.

Vendor

Commodity – For every commodity line there's an accounting string. Be sure to include all information in the description box.

Accounting – to every commodity line there is an accounting line/tab. i.e., if you select line 4 on your list of 20 commodity lines and then click the accounting tab – you will be viewing the accounting string that belongs to line 4.

Posting – Nothing to this section

Free Form Vendors – only use when the vendor is not in the system, fill this section out and be sure to attach the W9 to the Header of the requisition. Refer to the end to see how to attach a document to the Header – all attachments must be attached to either the Header or can also be attached as Document Comments if the requisition is already Pending approval.

ACCOUNTING DISTRIBUTION TAB

Use accounting distribution when you have multiple commodity lines and only one accounting string. Do not use if you have multiple commodity lines and multiple accounting strings.

The screenshot shows the 'Accounting Distribution' tab in the CGI Advantage system. The header area displays 'Total Lines: 0', 'Line: none', and 'Distribution %: none'. Below the header, there is a table with columns: Accounting Template, Distribution %, Fund, Sub Fund, Resource, Project Year, Goal/Categorical, Function/Activity, and Dist/Ag. The table is currently empty, with a message 'No records found.' and 'From 0 to 0 Total: 0'. At the bottom of the screen, there is a toolbar with buttons: Save, Undo, Insert New Line, Insert Copied Line, and Done. Below the toolbar, there are sections for Vendor, Commodity, Accounting, Posting, and Free Form Vendors, each with associated fields and summary statistics.

VENDOR TAB

Click the **Insert New Line** button at the bottom left of the **Vendor Tab**, that will open the grey areas and allow you to search or enter the **Vendor Customer ID**

If you know your vendor ID, you may type it in, if you do not, then see step #2 – click the green up arrow, and the system will take you to the search page...

The screenshot shows the 'Vendor' tab in the CGI Advantage system. The header area displays 'Total Lines: 0', 'Line: none', and 'Distribution %: none'. Below the header, there is a table with columns: Vendor Customer, Legal Name, and Line Number. The table is currently empty, with a message 'From 0 to 0 Total: 0'. At the bottom of the screen, there is a toolbar with buttons: Insert New Line, Insert Copied Line, and Edit with Grid. Below the toolbar, there are sections for Vendor, Commodity, Accounting, Posting, and Free Form Vendors, each with associated fields and summary statistics. Two pink annotations are present: a circle with the number '1' pointing to the 'Insert New Line' button, and a circle with the number '2' pointing to the green up arrow icon in the 'Vendor Customer' field.

If you do not know your vendor ID – search by their legal name (name listed on their W9) or you can search by their tax ID (also found on their W9). If you do not know their exact legal name, you can also do a wild card search. A wild card search is where you type a * in front of the letters (shift, and the number 8) i.e. if you are looking for TOZ Entertainment, you can search simply *TOZ* and click the [Browse](#) hyperlink.

If you are searching for a vendor, the system will take you to this page...

CGI Advantage

Welcome, Kimberly Davila

Choose

[Browse](#) [Clear](#)

Vendor/Customer : Merchant ID :

Legal Name : Alias/DBA :

Last Name : Taxpayer ID Number :

District/Agency :

Vendor/Customer	Legal Name	Last Name	Alias/DBA	Vendor Active Status	Customer Active Status	Lock Account
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[Cancel](#) First Previous Next Last

CGI Advantage

Welcome, Kimberly Davila

Choose

[Browse](#) [Clear](#)

Vendor/Customer : Merchant ID :

Legal Name : *TOZ* Alias/DBA :

Last Name : Taxpayer ID Number :

District/Agency :

Vendor/Customer	Legal Name	Last Name	Alias/DBA	Vendor Active Status	Customer Active Status	Lock Account
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[Cancel](#) First Previous Next Last

CGI Advantage

Welcome, Kimberly Davila

Choose

[Browse](#) [Clear](#)

Vendor/Customer : Merchant ID :

Legal Name : *TOZ* Alias/DBA :

Last Name : Taxpayer ID Number :

District/Agency :

	Vendor/Customer	Legal Name	Last Name	Alias/DBA	Vendor Active Status	Customer Active Status	Lock Account
Select	0000170591	TOZ ENTERTAINMENT, INC.			Active	Inactive	No
Select	0000170592	TOZ ENTERTAINMENT INC	HEARTSTRINGS COLLECTIVE		Active	Inactive	No

[Cancel](#) First Previous Next Last

If you find there is more than one vendor ID, take the time to select the vendor ID and make sure the address and/or the tax ID matches. Important for processing. For example, Universities or National Organizations with many departments and/or locations, will have more than one ID – one ID for each department, etc.

[Select](#) your Vendor and the system will take you back to your requisition.

Only the name of the Vendor will show **Push the save button at the bottom left, and the system will auto fill the address code and vendor contact if there is one...

You will get an error message if all the sections are not auto-filled.

CGI Advantage

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004282 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/07/2025

Header

Accounting Distribution Total Lines: 0 Line: none Distribution %: none

Vendor Vendor Customer: 0000170591 Legal Name: TOZ ENTERTAINMENT, INC.

Line Number	Vendor Customer
1	0000170591

From 1 to 1 Total: 1

Vendor

Vendor Customer: 0000170591

Legal Name: TOZ ENTERTAINMENT, INC.

Alias/DBA:

Address Code: AD002

3633 SOMERSET DRIVE
LOS ANGELES
CA
90016
US

Save **Undo** **Insert New Line** **Insert Copied Line** **Edit with Grid**

Commodity Total Lines: 0 Line Number: none Item Total Amount: none Open Amount: none

Next.... go to the Commodity Section

COMMODITY TAB

Click the Insert New Line, bottom left to open your first commodity line. If you are ordering office supplies, for example, and your quote has 20 lines on it, then you will have 20 commodity lines. If you are working on field trip/bus transportation requisition, then you will, most likely, have only 1 commodity line.

CGI Advantage

Welcome, Kimberly Davila

Requisition(XREQ) Dist/Agency: 73437 ID: 250000004282 Ver.: 1 Function: New Phase: Draft Modified by COM_KDAVILA , 03/10/2025

Header

Accounting Distribution	Total Lines: 0	Line: none	Distribution %: none
Vendor	Vendor Customer: 0000170591	Legal Name: TOZ ENTERTAINMENT, INC.	
Commodity	Total Lines: 0	Line Number: none	Item Total Amount: none Open Amount: none

Line Number	CL Description	Item Total Amount
From 0 to 0 Total: 0		

First Previous

General Information Shipping/Billing

Commodity:

CL Description:

Additional Commodity Information:

Stock Item Suffix:

Line Type:

Quantity:

UOM:

Unit Price:

Contract Amount:

Discounted Unit Price:

Service From:

Service To:

Accounting Profile:

Tax Profile:

Insert New Line Insert Copied Line Edit with Grid

Accounting	Accounting Line: none	Line Amount: none	Line Open Amount: none
Posting	Total Lines: 0	Posting Line: none	

There are two types of requisitions: service or item (line type). Only certain sections are to be completed depending on which type you are submitting....please see below.

If your requisition is for product, then please complete the following sections of your **item** type requisition

Header 1			
Accounting Distribution	Total Lines: 1	Line: 1	Distribution %: 100.0000
Vendor	Vendor Customer: none	Legal Name: none	
Commodity	Total Lines: 6	Line Number: 1	Item Total Amount: \$214.99 Open Amount: \$0.00

General Information Shipping/Billing

Commodity: 60110000 

Classroom decoratives and supplies

CL Description: Balloons over the walkway on the right side

Additional Commodity Information:

Stock Item Suffix: 

Line Type: Item 

Quantity: 1.00000 

UOM: EA  

Unit Price: \$195.00 

Contract Amount: \$0.00

Discounted Unit Price: \$195.00

Service From: 

Service To: 

Accounting Profile: 

Tax Profile: 10.25% TAX  

Accounting	Accounting Line: 1	Line Amount: \$214.99	Line Open Amount: \$0.00
Posting	Total Lines: 1	Posting Line: 1	
Free Form Vendors	Total Lines: 0	Line Number: none	Vendor Name: none

If your requisition is a contract-related requisition or a **Service** Line Type requisition....see below
 Feel free to use the same commodity code for all contract-related requisitions and be sure to mention the agenda item number.

Service Dates: Service To Date: Suggested: Always type in July 31st of the fiscal year to allow for time to pay for the order. If the date passes, Purchasing will get an error on their end and will be unable to process.

Welcome, Kimberly Davila

Requisition(XREQ) | Dist/Agency: 73437 | ID: 250000003897 | Ver.: 1 | Function: New | Phase: Pending | Modified by COM

Header @ 1

Accounting Distribution	Total Lines: 0	Line: none	Distribution %: none
Vendor	Vendor Customer: 0000456262	Legal Name: CARDIO PARTNERS INC	
Commodity	Total Lines: 1	Line Number: 1	Item Total Amount: \$203,200.83 Open Amount:

General Information | Shipping/Billing

Commodity: 64130000

General agreements and contracts

CL Description: GENERAL AGREEMENTS AND CONTRACTS

Additional Commodity Information: ACCEPTANCE OF PRODUCTS AND MAINTENANCE SERVICES AGREEMENT WITH CARDIO PARTNERS TO PROVIDE DISTRICT-

Stock Item Suffix:

Line Type: Service

Quantity: 0.00000

UOM:

Unit Price: \$0.00

Contract Amount: \$203,200.83

Discounted Unit Price: \$0.00

Service From: 02/18/2025

Service To: 07/31/2025

Accounting Profile:

Tax Profile: 0% NO TAX

Accounting	Accounting Line: 1	Line Amount: \$203,200.83	Line Open Amount: \$203,200.83
Posting	Total Lines: 1	Posting Line: 1	

COMMODITY – SHIPPING/BILLING TAB

Product: allow the **Header** section to default to the Central Warehouse while all commodity lines show your site. The Warehouse needs to know where the “final destination” is, your site will show on the commodity lines.

Service: you may choose your site for the Header section and Commodity line/Shipping and Billing section – i.e. bus services, field trips, installation of, all intangible things.

ACCOUNTING TAB

Remember: for every commodity line you have an accounting line. If you have 20 commodity lines, you can select one of those lines in the commodity section and move from the Accounting to Commodity section to see the accounting line that belongs to every line you selected. If you have more than one line, i.e, office supplies, feel free to use the

Accounting Distribution section by entering the accounting string and clicking the **Distribute Accounting Lines** button on the bottom right part of the section.

FREE FORM TAB

This section is used when you are submitting a requisition for a vendor NOT entered into the system. The Purchasing Department requires a W9 to formally enter a vendor into the system, they will NOT enter the vendor without it.

Feel the section out as much as you can and attach the vendor's W9 to the Header of the requisition.

Header @ 1			
Accounting Distribution	Total Lines: 1	Line: 1	Distribution %: 100.0000
Vendor	Vendor Customer: none	Legal Name: none	
Commodity	Total Lines: 6	Line Number: 1	Item Total Amount: \$214.99 Open Amount: \$0.00
Accounting	Accounting Line: 1	Line Amount: \$214.99	Line Open Amount: \$0.00
Posting	Total Lines: 1	Posting Line: 1	
Free Form Vendors	Total Lines: 0	Line Number: none	Vendor Name: none

Line Number	Vendor Name
From 0 to 0 Total: 0	

First Previous Next Last

Free Form Vendors	
Line Number:	Principal Contact:
Added Using:	Telephone Number:
Vendor Name:	Fax Number:
Address 1:	Email Address:
Address 2:	Correspondence Type:
City:	Comments:
State Code:	
State:	
Zip:	
Country:	

To search for a vendor, go to the Vendor Tab and select the button with the green arrow

Header @ 1	
Accounting Distribution	Total Lines: 1 Line: 1 Distribution %: 100.0000
Vendor	Vendor Customer: none Legal Name: none

Line Number	Vendor Customer
From 0 to 0 Total: 0	

First Previous Next Last

Vendor	
Vendor Customer:	
Legal Name:	
Alias/DBA:	
Address Code:	

ATTACHING DOCUMENTS TO THE HEADER

ALWAYS ATTACH BACKUP DOCUMENTS TO THE HEADER

Click the **file** drop down from the bottom right section of the Header section, as shown below
Click **Attachments** from the list

Requisition(XREQ) Dist/Agency: 73437 ID: 250000000039 Ver: 1 Function: New Phase: Final Modified by COM_MSTREETER, 09/06/2024

Header @ 1

General Information | Contact | Internal Comments | Default Shipping/Billing | Document Information

Document Description: FIRST DAY OF SCHOOL DECORATIONS

Record Date: 09/06/2024
Budget FY: 2025
Fiscal Year: 2025
Period: 3
Total Tax Amount: \$54.38
Actual Amount: \$724.80
Closed Amount: \$724.80
Closed Date: 09/06/2024
Open Amount: \$0.00
Ref Amount: \$724.80

Tax Profile:
Accounting Profile:
Warehouse:
Procurement Folder: 1219826
Procurement Type ID: 61
Procurement Type: Standard Purchase
Total of Header Attachments: 1
Total of All Attachments: 1

Apply Tax Profile Load Vendor List Ship/Bill To Lines Reset Buyer View Procurement Folder

Accounting Distribution	Total Lines: 1 Line: 1 Distribution %: 100.0000
Vendor	Vendor Customer: none Legal Name: none
Commodity	Total Lines: 6 Line Number: 1 Item Total Amount: \$214.99 Open Amount: \$0.00
Accounting	Accounting Line: 1 Line Amount: \$214.99 Line Open Amount: \$0.00
Posting	Total Lines: 1 Posting Line: 1
Free Form Vendors	Total Lines: 0 Line Number: none Vendor Name: none

Edit Copy Copy Forward Discard

View PDF Print Processing Workflow File Attachments

You must be "editing" the requisition when attempting to attach documents to the requisition.
Select the upload [hyperlink](#)

Welcome, Kimberly Davila
LACOE 3.11.1 Production
FIN

+ Message Center
+ Search
+ History
Favorites
PO1 Search
BQK12EL4
XREQ
WRKLSTDL PG
RQWRKB
Vendor PO Search
VCUST
Vendor Creation
K12 Exp Budget
Vendor Creation
+ Administration
CGI Business Intelligence

Attachments

File Name	Type	Date	User ID	Primary State
-----------	------	------	---------	---------------

First Prev Next Last

[Upload](#) [Download](#) [Search](#) [Delete](#) [Restore](#)

File Name : Description :
Type :
Date :
User ID :
Primary State :

[Return to Document](#)
[View Attachment History](#)

You can attach up to five files. The system will notify you if the file is too large, and if it is, you must delete it, it will be unavailable to all other parties.

Note: If it is too large, you can either separate the documents or scan them at a lower resolution to decrease the size.

Welcome, Kimberly Davila
LACOE 3.11.1 Production
FIN

Message Center

Search

History

Favorites

PO1 Search

BQK12EL4

XREQ

WRKLSTDL PG

RQWRKB

Vendor PO Search

VCUST

Vendor Creation

K12 Exp Budget

Vendor Creation

Administration

CGI Business Intelligence

Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page.Click 'Upload' or 'Cancel' when you have finished.
[Browse](#)

Description :

Attachment Type :

Standard

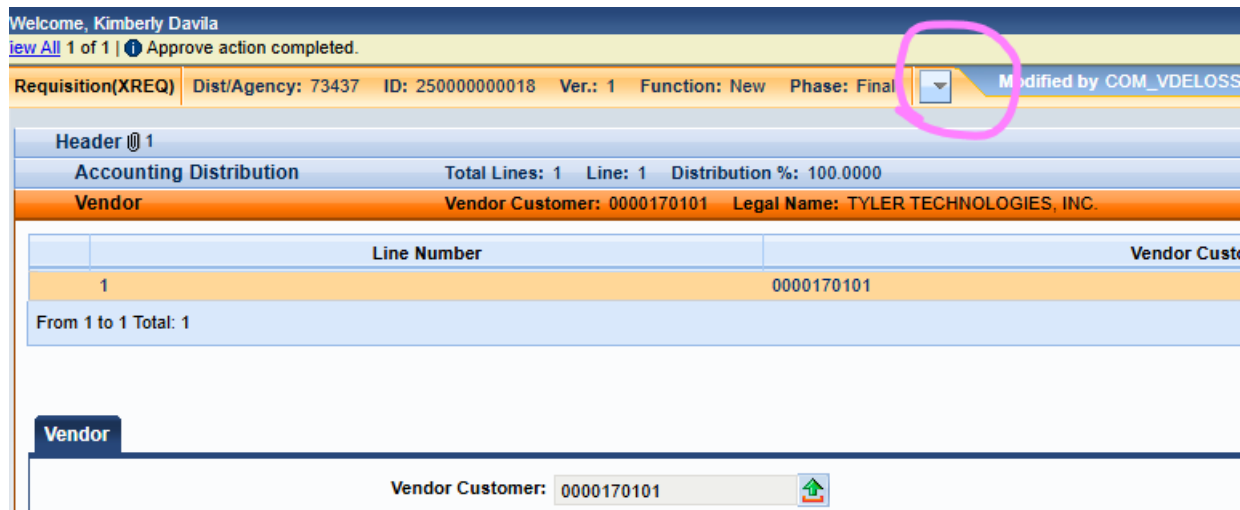
Select All With selected : Apply Description Apply Attachment Type Clear Description Remove

Upload [Cancel](#)

ATTACHING DOCUMENTS TO THE REQUISITION ITSELF – THROUGH THE MAIN BAR

Once the document (XREQ, PO1, etc.) is pending approvals, you can no longer attach files to the header. However, you can attach to the document itself.

Click the menu drop down once in the requisition



Header 1

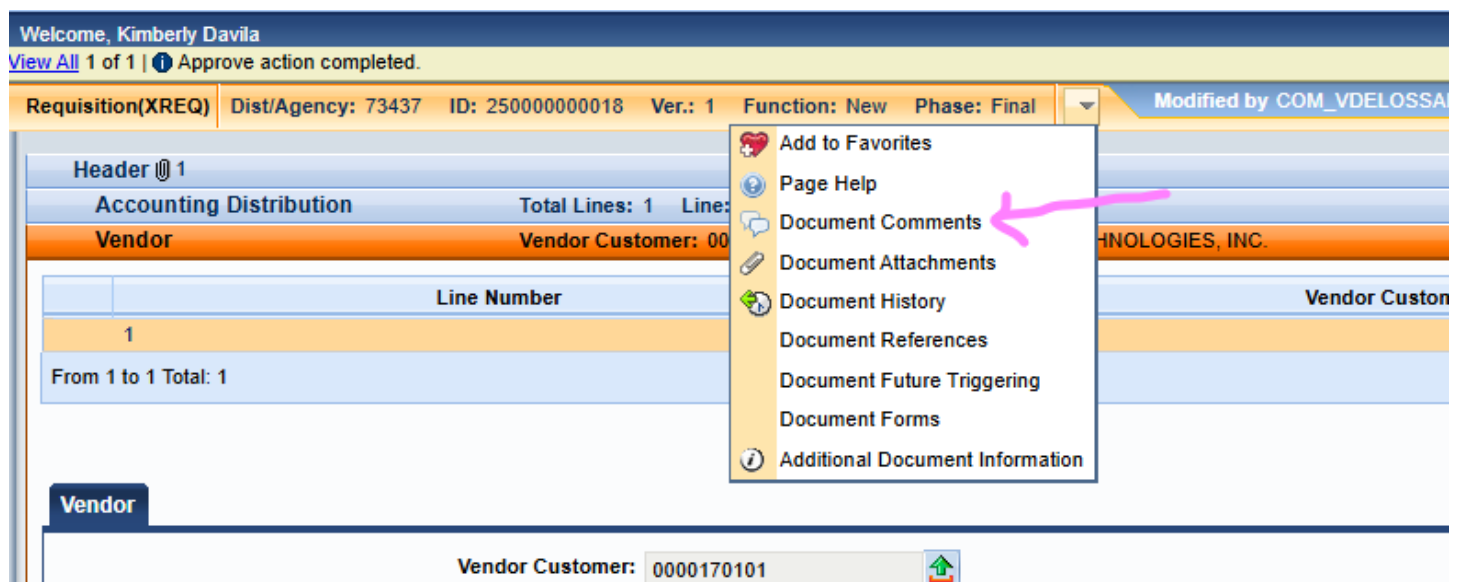
Accounting Distribution	Total Lines: 1	Line: 1	Distribution %: 100.0000
Vendor	Vendor Customer: 0000170101	Legal Name: TYLER TECHNOLOGIES, INC.	

Line Number	Vendor Customer
1	0000170101

From 1 to 1 Total: 1

Vendor Customer: 0000170101

Select **Document Comments** from the drop-down list, this will take you to the **Document Comments** web page.



Header 1

Accounting Distribution	Total Lines: 1	Line: 1
Vendor	Vendor Customer: 0000170101	Legal Name: TYLER TECHNOLOGIES, INC.

Line Number	Vendor Customer
1	0000170101

From 1 to 1 Total: 1

Vendor Customer: 0000170101

- Add to Favorites
- Page Help
- Document Comments
- Document Attachments
- Document History
- Document References
- Document Future Triggering
- Document Forms
- Additional Document Information

Click the Insert hyperlink

Enter a ***Subject** and ***Comment**, i.e. attachment of W9, then select the Save hyperlink.

After you save, select the Attachments hyperlink. The attachments hyperlink will take you to the **Reference Table Attachments** web page.

Welcome, Kimberly Davila
LACOE 3.11.1 Production
FIN

- Message Center
- Search
- History
- Favorites
 - PO1 Search
 - BQK12EL4
 - XREQ**
 - WRKLSTDL PG
 - RQWRKB
 - Vendor PO Search
 - VCUST
 - Vendor Creation
 - K12 Exp Budget
 - Vendor Creation
- Administration
 - CGI Business Intelligence

Document Comments

XREQ - 73437- 250000000008

Version	Date/Time	User	Phase	Subject	Attachments
---------	-----------	------	-------	---------	-------------

First Prev Next Last

Save [Undo](#) [Insert](#) [Copy](#) [Paste](#) [Search](#) [Attachments](#)

Document Code :

Doc District/Agency :

Document ID :

Version :

User :

Phase :

Standard Comment Code :

*Subject :

*Comment :

Click the [Upload](#) hyperlink and drag your file to the description box, it will turn white when it's ready to accept the document. Then click

Reference Table Attachments

File Name	Type	Date	User ID
-----------	------	------	---------

First Prev Next Last

[Upload](#) [Download](#) [Search](#) [Delete](#)

File Name : Description :

Type :

Date :

User ID :

[Return](#)

[View Attachment History](#)

While in the **Upload Attachment** web page, drag the file to the white description box, then select the [Upload](#) hyperlink

Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page. Click 'Upload' or 'Cancel' when you have finished.
[Browse](#)

Description :

Attachment Type : Standard ▼

[Select All](#) With selected : [Apply Description](#) [Apply Attachment Type](#) [Clear Description](#) [Remove](#)

	File Name	Description	Attachment Type
☐	W9_UCLA.pdf		Standard ▼

Total Number of Files selected: 1
[Upload](#) [Cancel](#)

The system will tell you whether the download was successful or not. When it is, click the [Done](#) hyperlink.

Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page. Click 'Upload' or 'Cancel' when you have finished.
[Browse](#)

Description :

Attachment Type : Standard ▼

[Select All](#) With selected : [Apply Description](#) [Apply Attachment Type](#) [Clear Description](#) [Remove](#)

	File Name	Description	Attachment Type	File Size
	W9_UCLA.pdf		Standard	1.46 MB

Total Number of Files selected: 1
Total Files Size: 1.46 MB
Upload [Done](#)

System will take you back to the **Reference Table Attachments** web page, click the [Return](#) hyperlink to go back to the **Document Comments** web page, then [Back](#) hyperlink to return to your requisition.

Need Help

- Reach out to your Buyer, Purchasing Department
- LACOE helpdesk – helpdesk@lcoe.edu or (562) 922-6646

Step by Step Guide Created by:

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