

REQUISITION ATTACHMENTS 9.2

Requisitions often need supporting documents to be attached for review/approval. To confirm exactly what documentation is needed for your requisition, please reach out to a Fiscal Accountant and/or a Buyer in Purchasing.

Once you are ready to add an attachment to your requisition (MUST BE IN THE ADD/UPDATE REQUISITION page), please follow the steps below.

1. Click "Add Comments." A smaller window will pop up titled "Header Comments"

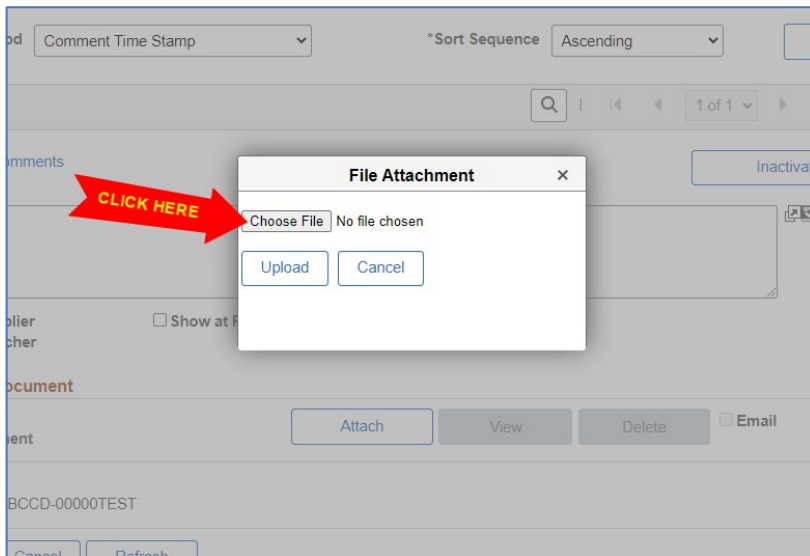
The screenshot shows the 'Maintain Requisitions' interface. The 'Add Comments' button is highlighted with a red box and a red arrow pointing to it with the text 'Click here'. The page displays various fields for requisition details, including Business Unit (LBCCD), Requisition ID (00000TEST), Requisition Name (00000TEST), Requester (0527894), Requisition Date (12/02/2022), Origin (ONL), Currency Code (USD), and Accounting Date (12/02/2022). A table at the bottom shows requisition lines with columns for Line, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status.

2. Enter a description or any necessary comments into the box indicated below. Then click on the "Attach" button. This will take you to the window where you can select the file.

The screenshot shows the 'Header Comments' dialog box. It contains fields for Business Unit (LBCCD), Requisition ID (00000TEST), Requisition Date (12/02/2022), and Status (Pending). There are dropdown menus for 'Sort Method' (Comment Time Stamp) and 'Sort Sequence' (Ascending), along with a 'Sort' button. A 'Comments' section has a search bar and a 'View All' button. Below that, there are checkboxes for 'Send to Supplier' (checked), 'Show at Receipt', and 'Show at Voucher'. An 'Associated Document' section has an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and 'Email'. A red arrow points to the 'Attach' button with the text 'Click here'. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons.

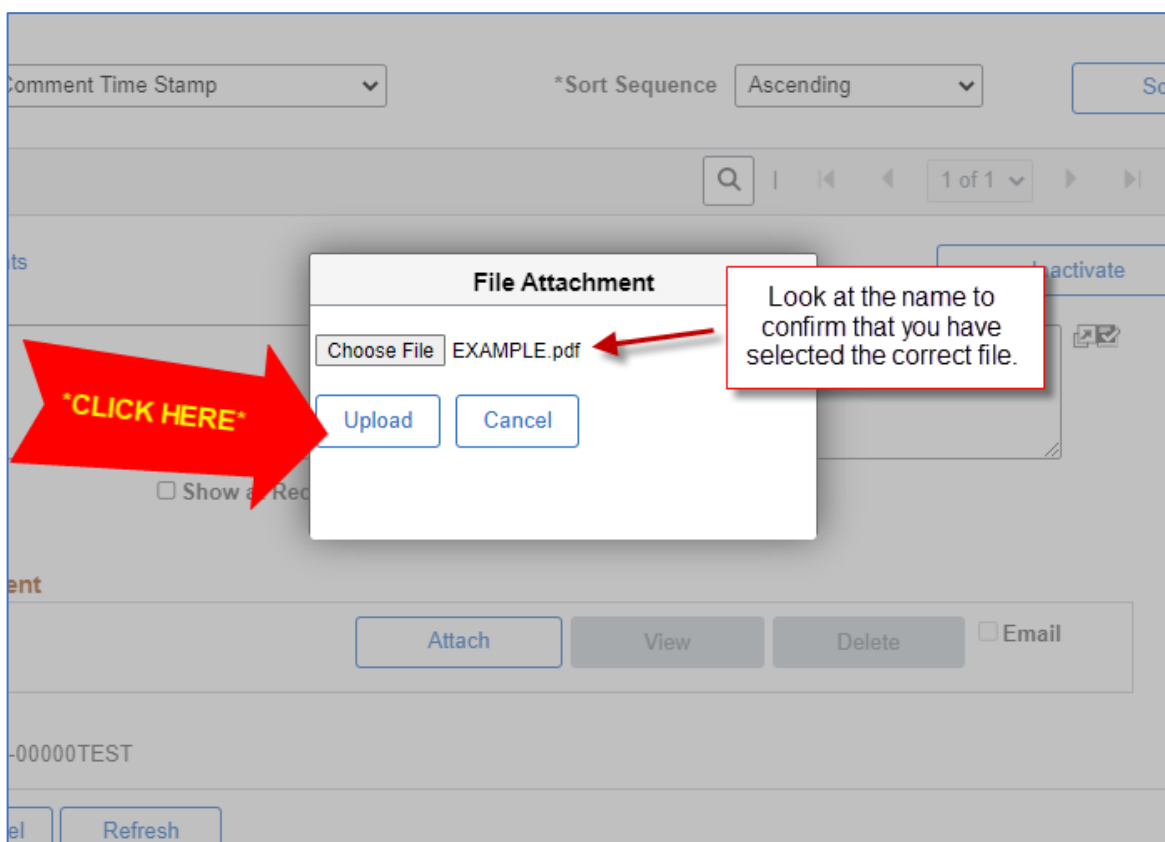
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- Click on “Choose File,” then select the file from your computer. Once you’ve selected your document, the name of your file should show next to the Choose File button.



- Click on the **UPLOAD** button. This is a crucial step. Your document will not be attached if you do not click **UPLOAD**.

Once the file has been uploaded, the name of the file will be shown as an Attachment.



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5. If everything is complete with the Attachment, click OK to return to the Requisition Main Page.

Header Comments

Business Unit LBCCD Requisition Date 12/02/2022
Requisition ID 00000TEST Status Pending

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Comment Status Active Inactivate +

DESCRIPTION OF ATTACHED DOCUMENT HERE

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment EXAMPLE.pdf Attach View Delete Email

From -> REQ LBCCD TEST

OK Cancel Refresh

6. **MAKE SURE TO SAVE YOUR REQUISITION** by clicking the blue SAVE button in the bottom left corner of the Main Req Page.

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If you need to add multiple Attachments:

Click on the [+] button and repeat Steps 2 through 6.

The screenshot shows the 'Header Comments' window for Business Unit LBCCD and Requisition ID 00000TEST. The status is Pending. The window includes sorting options for 'Sort Method' (Comment Time Stamp) and 'Sort Sequence' (Ascending). In the 'Comments' section, there is a search bar, navigation arrows, and a 'View All' link. A red arrow labeled 'CLICK HERE' points to a '+' button next to the 'Comment Status Active' label. Below this is a text area for 'DESCRIPTION OF ATTACHED DOCUMENT HERE', checkboxes for 'Send to Supplier' (checked) and 'Show at Voucher', and an 'Associated Document' section with an 'Attach' button and a list of attachments including 'EXAMPLE.pdf'. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.

If you need to remove an Attachment:

Click on the **DELETE** button, and save the Req. (If you have multiple attachments, make sure you are deleting the correct one!)

This screenshot shows the same 'Header Comments' window. In the 'Comments' section, there is an 'Inactivate' button and a '+' button. The 'Associated Document' section now shows an 'Attach' button and a 'Delete' button. A red arrow labeled 'CLICK HERE' points to the 'Delete' button. The 'EXAMPLE.pdf' attachment is still listed. The 'From' field at the bottom shows 'From -> REQ LBCCD-00000TEST'. The 'OK', 'Cancel', and 'Refresh' buttons are at the bottom.