



STEPS TO ENTERING A CONSULTANT AUTHORIZATION

To correctly enter a Consultant Authorization the user must follow these steps:

1. To enter Consultant Authorizations select *GO* from the Menu Bar. A menu window will appear, select *Administer Procurement*. Another window will appear, select *Requisition Items*. This will give the user access to the Requisition Module.
2. To start entering the Consultant Authorization, select *Use* from the toolbar. A menu window will appear, select *Requisition*. Another window will appear select, *Requisition Form*. Another window will appear. Select *Add* to enter a new transaction. Select *Update/Display* for an existing one.
3. After selecting *Add* a dialog box will appear. **Do not change** the information; click *OK* to continue entering the transaction. You may begin entering your transaction.
4. The first panel your need to complete is *Requisition Form*: Go into the *Requisition Form* panel and copy the requisition template for consultant authorization.
5. Enter requisition date, due date, origin, and select requester. Select origin and department id. Origin and department Id are required fields to establish workflow.
6. The next step will be selecting a vendor. To complete this step, go into the *Defaults / Details* panel and start the process selection. Select location and ship to address.
7. In the *Defaults / Details* panel select *SpeedCharts* to be used in the transactions.
8. Edit requisition items. You must edit category, long description, quantity, and units of measurements and price. Enter line comments. If you want the line comments to reach the vendor select the *Send to Vendor* checkbox.
9. Select the *Header Comments* panel. Enter requisition comments as required for consultant authorizations.
10. Proceed to *Edit* the transaction.
11. *Refresh* after edit process is completed.
12. Your final step will be to *Budget Check* the transaction.
13. To exit a requisition after completing the transaction, click on the red X on your toolbar.