

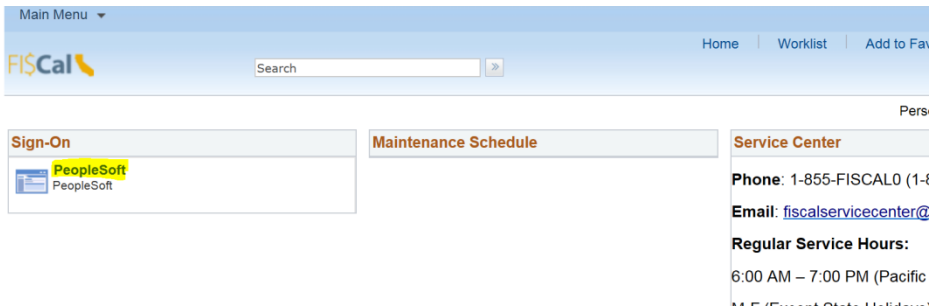
OTA FISCAL DESK PROCEDURES

Update Existing Requisition Submitted to DGS One Time Acquisitions (OTA)

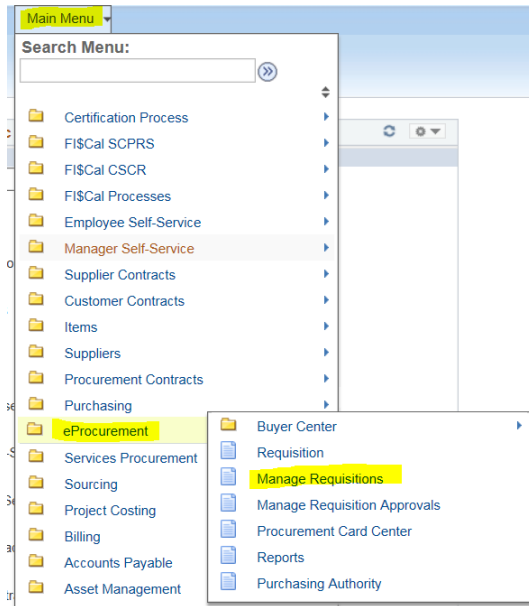
Use these procedures if you are a FISCAL transacting agency and you need to update a previously submitted FISCAL Requisition.

NOTE: OTA NO LONGER ACCEPTS A STD. 96 FROM FISCAL TRANSACTING AGENCIES WHEN REQUESTING A REQUISITION/PURCHASE ORDER CHANGE

1. Login to FISCAL
2. Under 'Sign On' Click on the 'PeopleSoft' link



3. Navigate: **Main Menu > eProcurement > Manage Requisitions**



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- 4. Enter the appropriate values into the following fields to locate the previously submitted FISCAL requisition:

Business Unit: Use the lookup icon to search for, or manually type your agency Business Unit (BU)

Requisition ID: Use the lookup icon to search for, or manually type the Requisition ID number (e.g. 0000000345)

Date From: Remove default value and leave blank

Requester: Remove default value and leave blank

Requisition Name: Leave blank

Request State: Leave as is "All but Complete"

Budget Status: Leave as is

Date to: Remove default value and leave blank

Entered By: Leave blank

PO ID: Leave blank

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	7760	Requisition Name	
Requisition ID	0000000001	Request State	All but Complete
Date From		Date To	
Requester		Entered By	
Budget Status		PO ID	

Search Clear Show Advanced Search

! The Requester specified has no Requisitions.

- [Create New Requisition](#)
- [Review Change Request](#)
- [Review Change Tracking](#)
- [Manage Receipts](#)
- [Requisition Report](#)

- 5. Click the **'Search'** button
- 6. Locate the desired Requisition in the search results
- 7. Scroll to far right of the Requisition line
- 8. Use the **'Select Action'** drop down to select **'Edit'**

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Acq Type	Acq Sub-Type	Acq Method	Acq Sub-Method	Total
▶ 0000000001	0000000001	7760	01/14/2016	Open	Not Chkd	NON-IT Goods		Cooperative		0.01 USD

Edit Go

- 9. Click the **'Go'** button
- 10. When warning message appears, click the **'OK'** button

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11. On the '**Edit Requisition – Review and Submit**' page make all the desired changes to the Requisition (e.g. add a line item, remove line item, change quantity on existing line item)
12. Click the '**Submit for Approval**' button
13. Click the '**Approval Inquiry**' button to check if the OTA Requisition Approver is the last approver in the approval path. **This guarantees that OTA sees the changes made to your request. If the OTA MST is not in the approval path, OTA will not be able to see or process your change request**

NOTE: If you are decreasing the line item quantity or unit price, add a new line item with the new quantity and/or dollar amount and remove the original line item from the requisition. If you are increasing the line item quantity or unit price, make the changes on the existing line item. The system will not retrigger the approval path when the quantity or dollar amount is decrease, only when it is increased.