SUPPLIER MANAGEMENT

FMIS User Manual Supplier Management

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Version: 3.0

1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
08 August 2018	Cherie Anne R. Pasco	1.0	Initial
28 August 2018	Cherie Anne R. Pasco	2.0	Added the process for running the Employee Update Program
15 November 2019	Julius Ermitanio	2.1	Added steps on how to remove supplier site
02 February 2024	Kim Carlo A. De Leon	3.0	Added guides on how to register a new standard supplier with similar TIN as existing supplier and a supplier branch
08 March	Riza Nequias	3.1	Added guide on how to register Supplier Email for Separate Remittance Advices

INTRODUCTION

Supplier Management, in the context of the University Information System, covers supplier registration, recording and maintenance of supplier information such as company profile including tax information, and tagging of inactive or delinquent suppliers.

Designated supplier managers of the University of the Philippines are provided with the Supplier Manager responsibility in the University Information System (UIS).

This manual includes the following topics:

- Searching for an existing supplier
- Registration of a new standard supplier
- Registration of a new standard supplier with similar TIN as an existing supplier
- Registration of a UP supplier branch
- Registration of a UP internal supplier
- Verification and Creation of Additional Supplier site
- Updating of supplier information
- Registration of Supplier Email for Separate Remittance Advices
- Running the Employee Update Program
- Merging standard suppliers
- Tagging a supplier as inactive
- Generation of reports
- Generation of UP List of Active Suppliers

Searching for Existing Suppliers

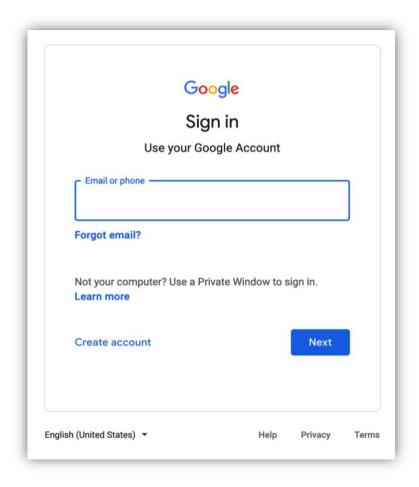
1. DOCUMENT CONTROL

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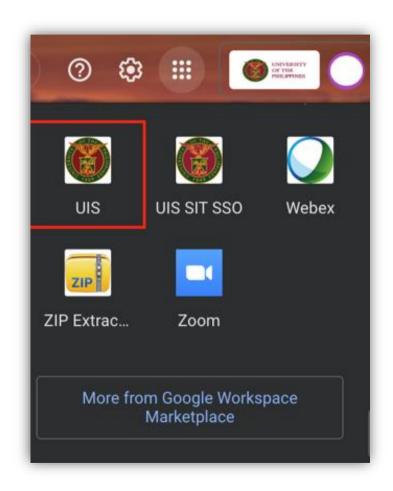
1.2 Description

Process ID	
Process Name	Searching for existing suppliers
Functional Domain	Accounts Payables Module
Responsibility	Supplier Manager
Purpose	To search for existing suppliers as a prerequisite to the registration a new supplier and updating supplier details
Data Requirement	 Supplier information such as Organization name – registered business name or Name of individual payee (self-employed, UP employee, contractual or job order)
Dependencies	None
Scenario	Originating unit submits a request through the Supplier Registration Form for the registration of a supplier or for updating of supplier information.



Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *email* and *password*)

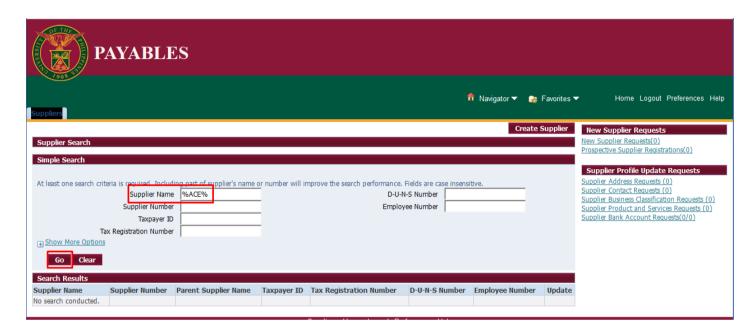


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the *Entry*

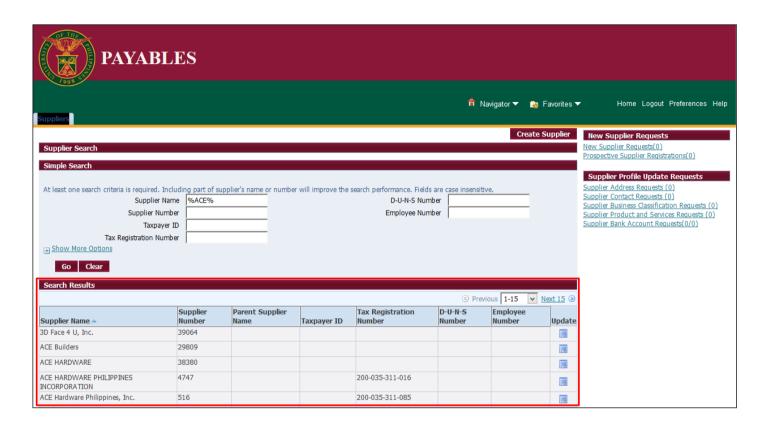


Step 4. Supplier Home Page will appear.

Search for the supplier using any of the available fields. You may use % as a wildcard character.

When searching for a **Supplier Name**, you may enter the name in between wildcard characters. For example, *%ACE%*.

Then, click Go.



Step 5. View the **Search Results** to determine is supplier is already registered in the system.

If supplier is not yet registered, proceed to *Registration of a New Standard Supplier* for external suppliers and organizations or proceed to *Registration of a UP Internal Suppler* for UP employees, contractual or job orders.

If a UP employee, contractual or job order is registered as a standard supplier, proceed to tagging the supplier as inactive. Then, proceed to Registration of a UP Internal Supplier.

If the supplier is already registered but supplier site indicates another constituent university or level 1 unit, proceed to *Verification and Creation of Additional Supplier Site*.

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Registration of a New Standard Supplier

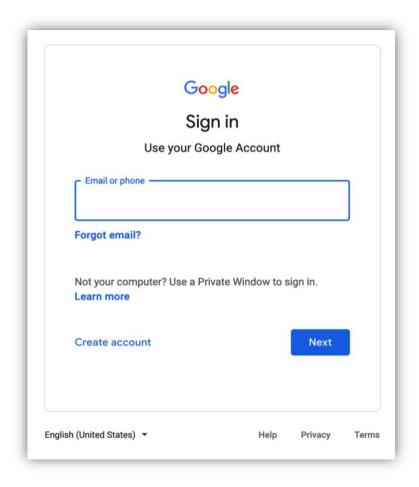
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
11August 2014	Michael Angelo B. Soliven	1.0	Initial
08 August 2018	Cherie Anne R. Pasco Julius A. Ermitanio	2.0	Updated field descriptions and modified instructions Updated screenshots

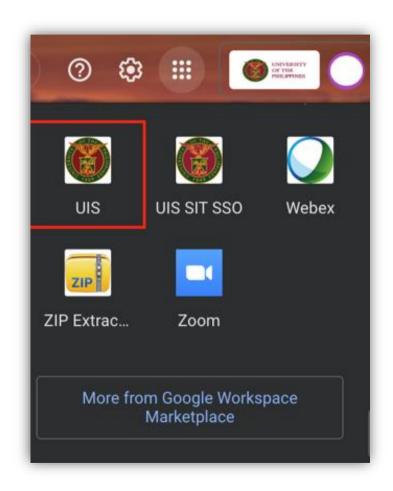
1.2 Description

Process ID			
Process Name	Registration of a new standard supplier		
Functional Domain	Accounts Payables Module		
Responsibility	Supplier Manager		
Purpose	To register a new external supplier in the system		
Data Requirement	Supplier information. Minimum requirements are as follows:		
	 Organization name – registered business name 		
	 Tax Identification Number (TIN) – BIR issued 		
Dependencies	None		
Scenario	Originating unit submits a request through the Supplier Registration		
	Form for the registration of an external supplier.		

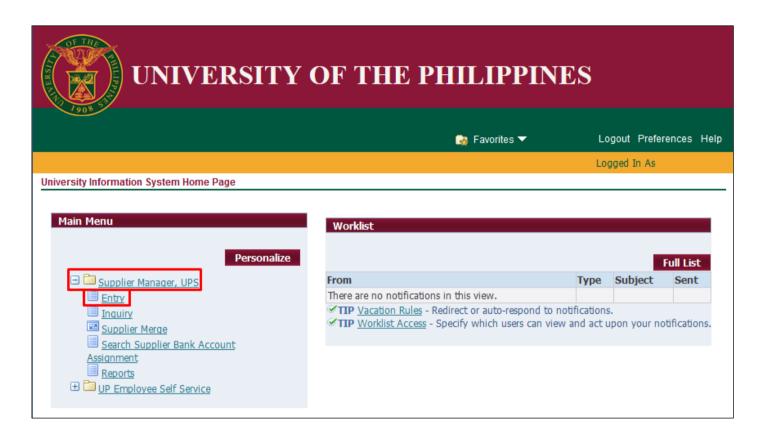


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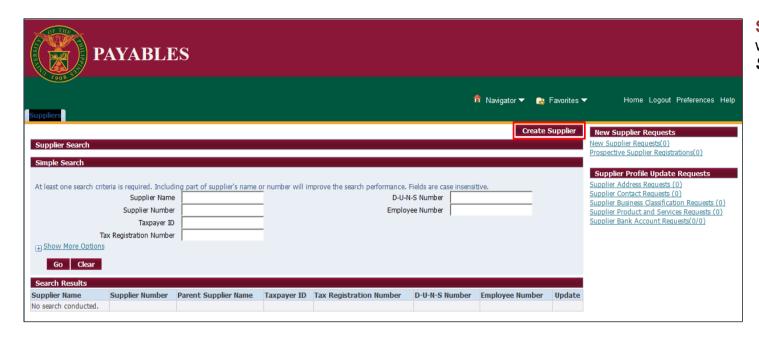


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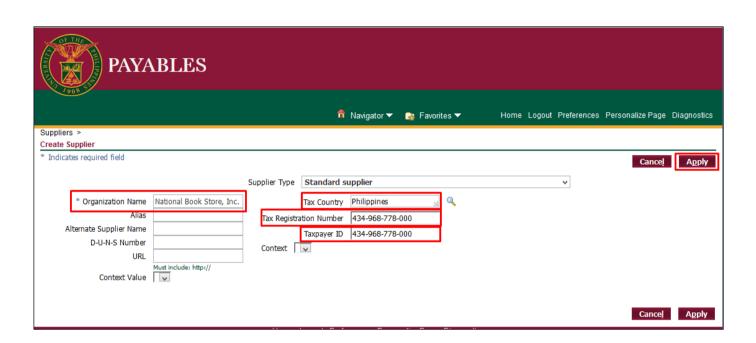


Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the *Entry*



Step 4. Supplier Home Page will appear the click Create Supplier

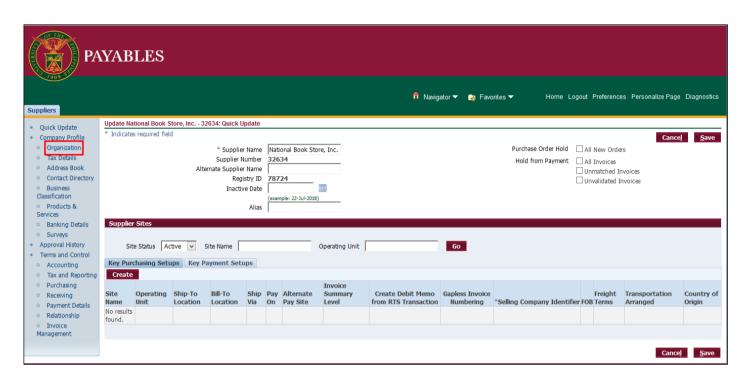


Step 5. Create Supplier Window will appear

Fill out the necessary details

Then click Apply

Field Name	Description	Remarks
Supplier Type	Standard Supplier	List of Values (LOV)
Organization Name	Registered business name of the supplier Example: • National Book Store, Inc.	Alphanumeric Standard
	Juan S. Dela CruzSM Supermall	
Tax Country	Philippines	List of Values (LOV)
Tax Registration Number	Tax Identification Number of the supplier	Alphanumeric
Tax Payer ID	Tax Identification Number of the supplier	Alphanumeric



Step 6.Click *Organization* on the left sidebar of the *Suppliers* tab.

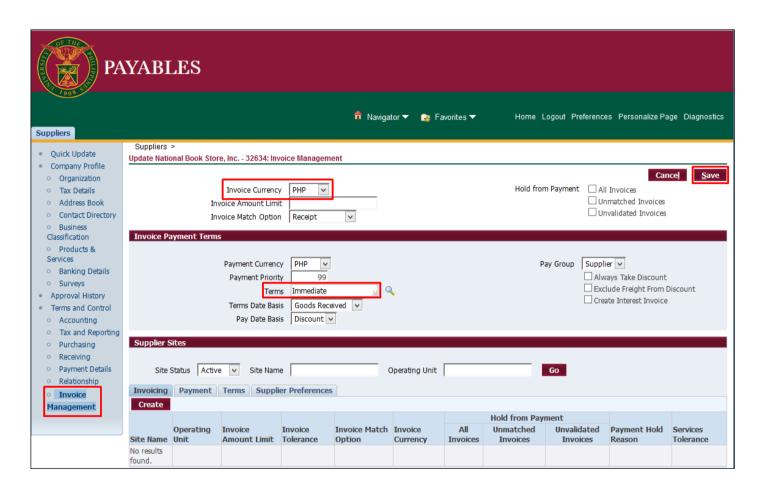
Fill in necessary details.

Select the appropriate *Type* to classify the supplier.

Then, click Save.

Note: Standard suppliers are usually tagged as **Supplier** but supplier managers are not limited to this option.





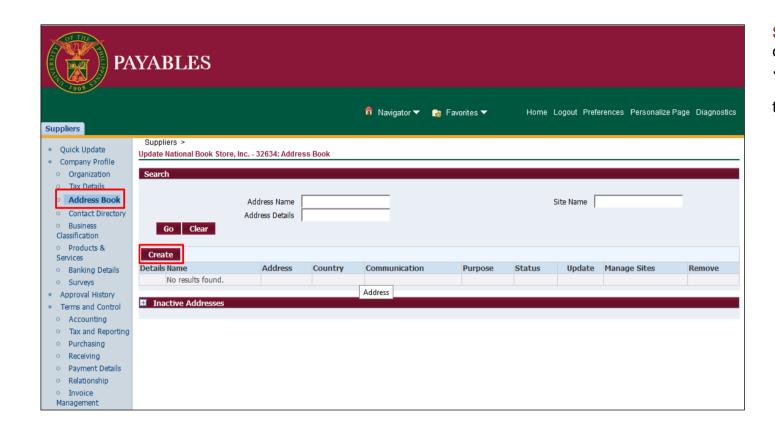
Step 7. Click *Invoice Management* on the left sidebar of the *Suppliers* tab.

Fill in necessary details.

Select *Philippine Peso* as *Invoice Currency*.

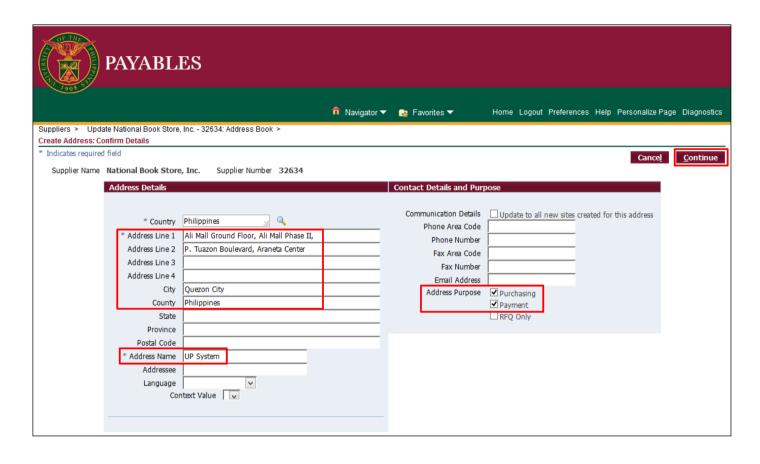
Set Terms at Immediate.

Then, click Save.



Step 8. Click Address Book on the left sidebar of the Suppliers tab

then click Create.



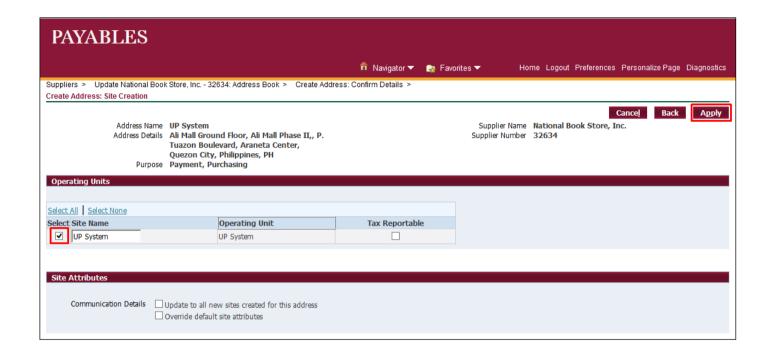
Step 9. The *Create Address:* Confirm Details page will appear

Fill-in required details.

For the *Address Name*, enter the constituent university or level 1 unit such as UP System, UP Diliman, etc.

For the *Address Purpose*, make sure that the checkboxes for *Purchasing* and *Payment* are ticked.

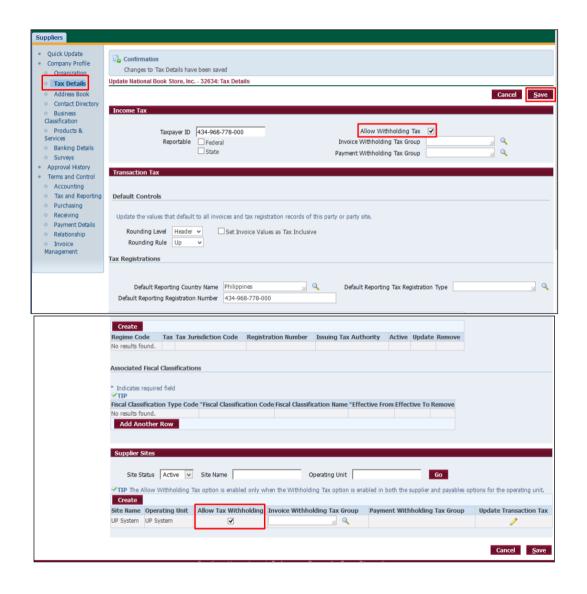
Then, click Continue.



Step 10. The Create Address: Site Creation page will appear.

Select the appropriate *Site Name* by ticking the checkbox beside it.

Then, click Apply.

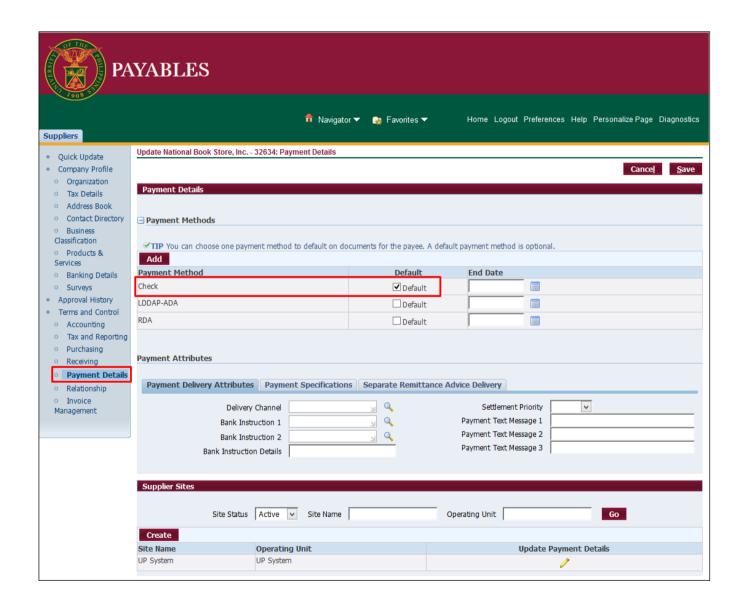


Step 11.Click *Tax Details* on the left sidebar of the *Suppliers* tab.

Please tick the *Allow Withholding Tax* and *Allow Tax Withholding* checkboxes

at the top and bottom regions of the page.

Then, click Save

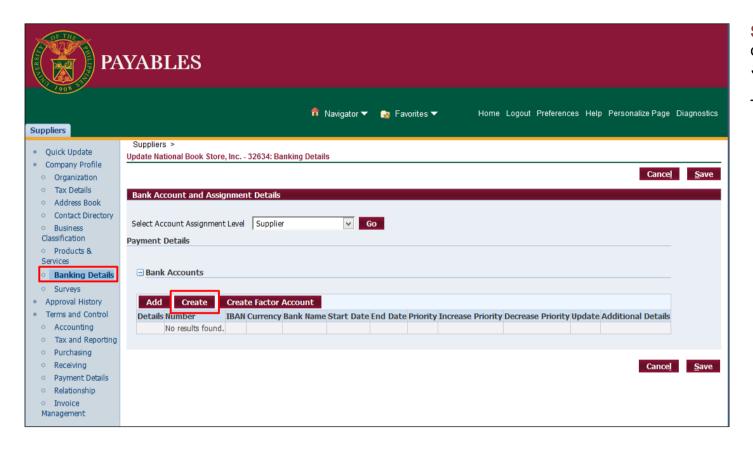


Step 12.Click *Payment Details* on the left sidebar of the *Suppliers* tab.

Choose a default *Payment Method* by ticking the checkbox beside it.

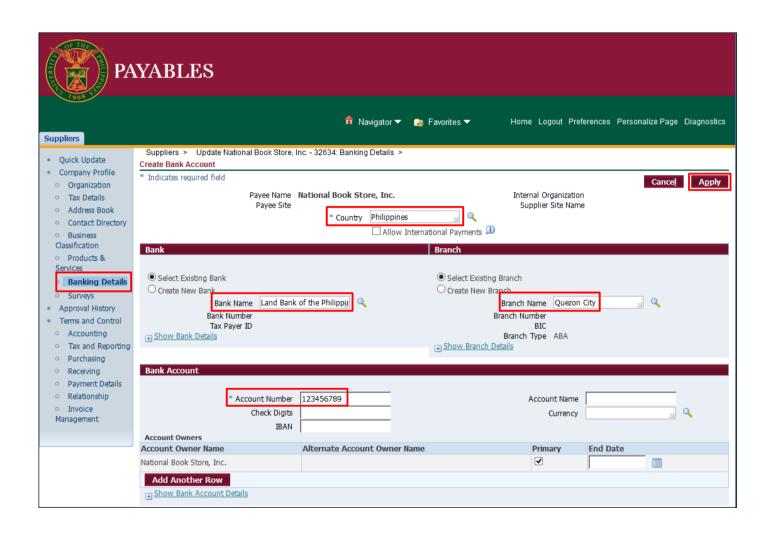
Then, click Save.

Note: For Standard Suppliers, the **Check** payment method is usually set as default.



Step 13.Click *Banking Details* on the left sidebar of the *Suppliers* tab.

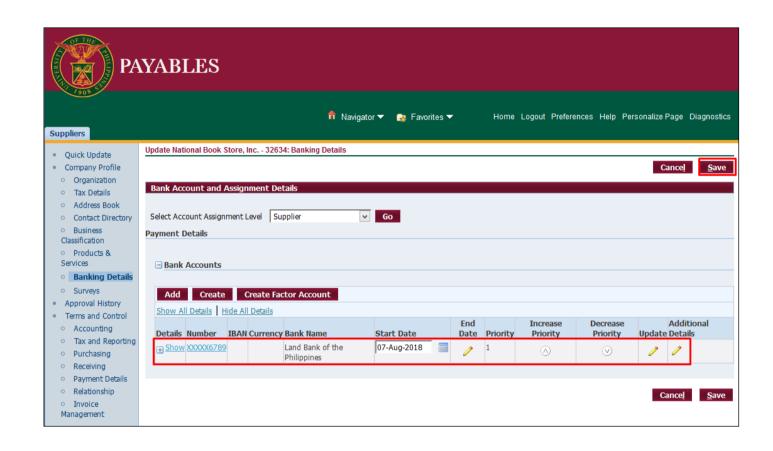
Then, click Create.



Step 14. The Create Bank Account page will appear.

Fill-in the necessary details including Country, Bank Name, Branch Name and Account Number.

Then, click Apply.



Step 15.On the Banking Details page click Save.

Expected Result:

A new Standard Supplier has been registered in the system.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Registration of a New Standard Supplier with Similar TIN as an Existing Supplier

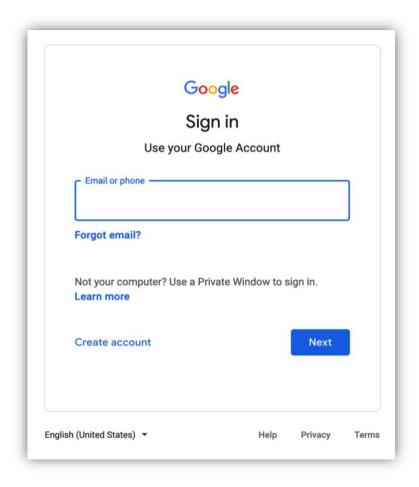
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Date	Author	Version	Change Reference:
02 February 2024	Kim Carlo A. De Leon	1.0	Initial document

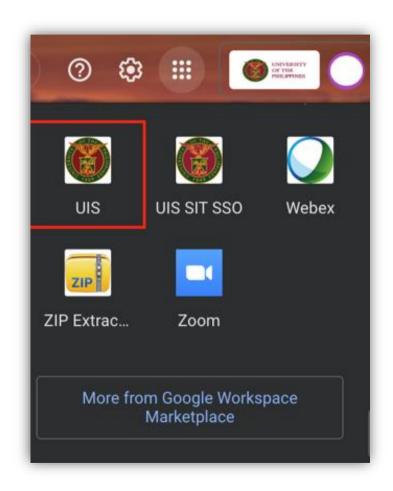
1.2 Description

Process ID	
Process Name	Registration of a new standard supplier with similar TIN as an existing supplier
Functional Domain	Accounts Payables Module
Responsibility	Supplier Manager
Purpose	To register a new standard supplier with similar TIN as an existing supplier in the system
Data Requirement	Supplier information minimum requirements are as follows: Organization Name Parent Supplier
Dependencies	Parent Supplier
Scenario	The originating unit submits a request through a supplier registration form. Upon checking by the Supplier Manager, there is an existing standard supplier that has the same TIN. The Supplier Manager will register a new standard supplier that will carry the same TIN as the existing supplier.

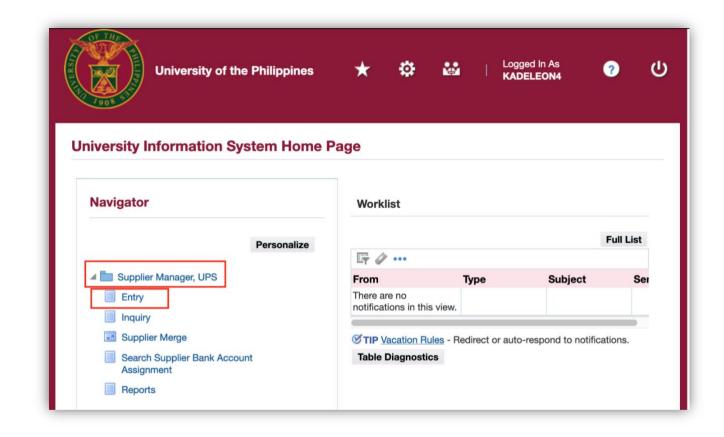


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *email* and *password*)

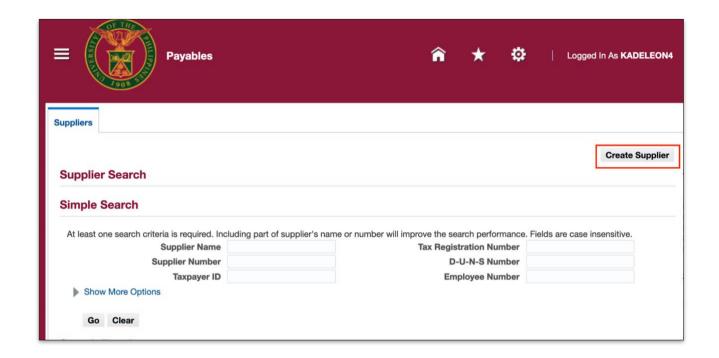


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



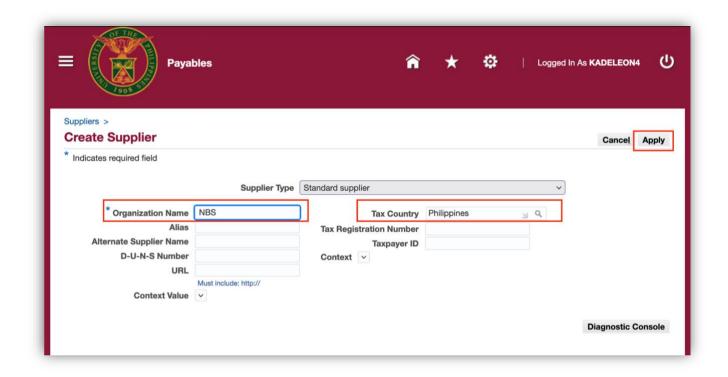
Step 3. From the *Navigator*, select the *Supplier Manager* responsibility.

Click Entry.



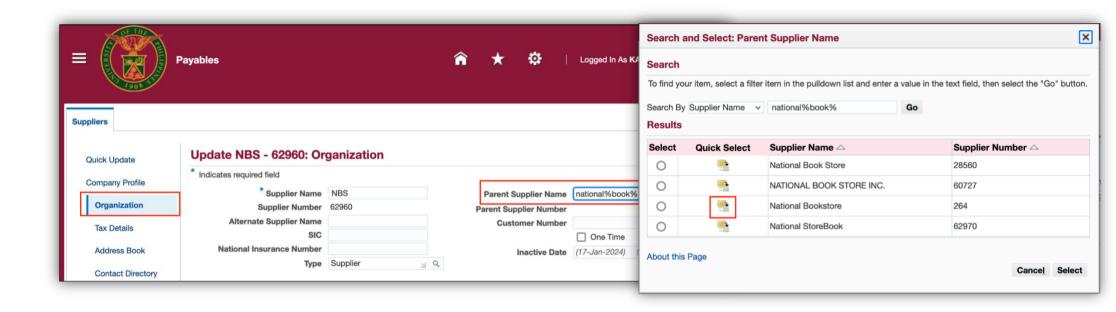
Step 4. The *Suppliers* page will appear.

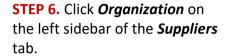
Click Create Supplier.



Step 5. Fill out the necessary details on the *Create Supplier* window.

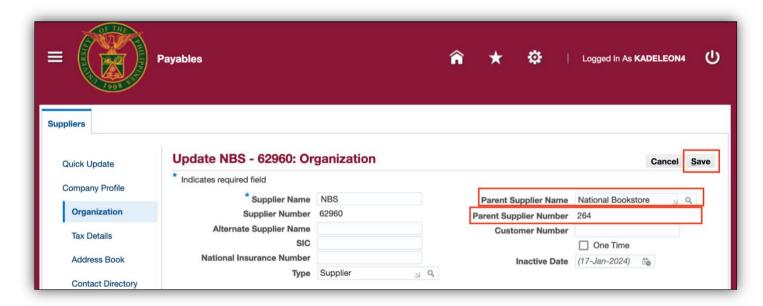
Click Apply.





Search for the name of the existing supplier with the same TIN under the *Parent Supplier Name*. For example, National%book%.

A new window will open, select the correct parent supplier then Click the quick select button.



STEP 7: Click the Save button.

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Registration of a UP Supplier Branch

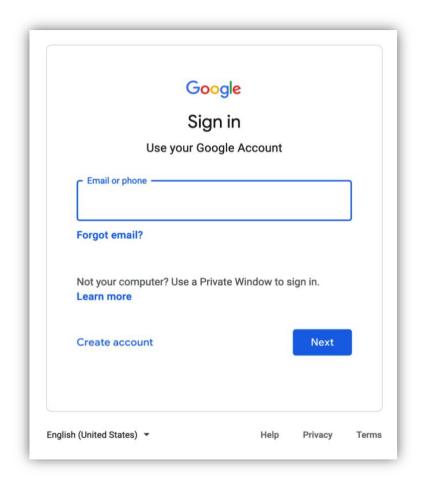
1. DOCUMENT CONTROL

1.1 Change Record

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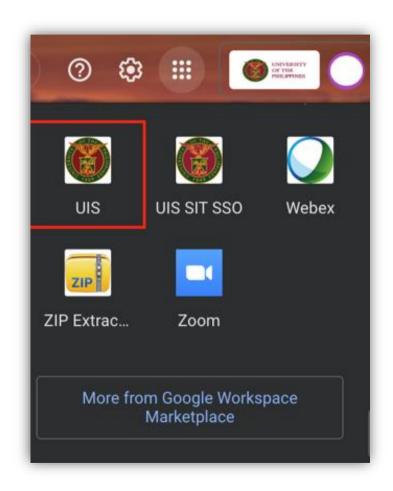
1.2 Description

Process ID		
Process Name	Registration of UP Supplier Branch	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	To register a supplier branch	
Data Requirement	Supplier information. Minimum requirements are as follows:	
	Organization Name	
	Address details	
	TIN of the Branch supplier	
Dependencies	Registered supplier in the system under the same organization	
Scenario	The originating unit submits a request through a supplier registration	
	form. Upon checking by the Supplier Manager, there is an existing	
	standard supplier under the same organization. The Supplier	
	Manager will register a new branch under the existing supplier.	

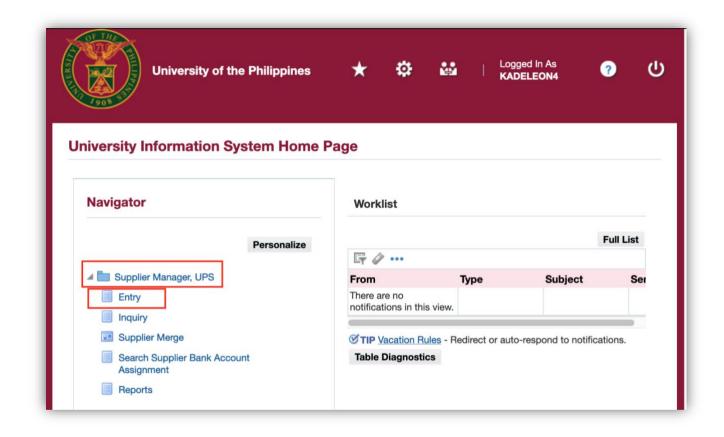


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *email* and *password*)

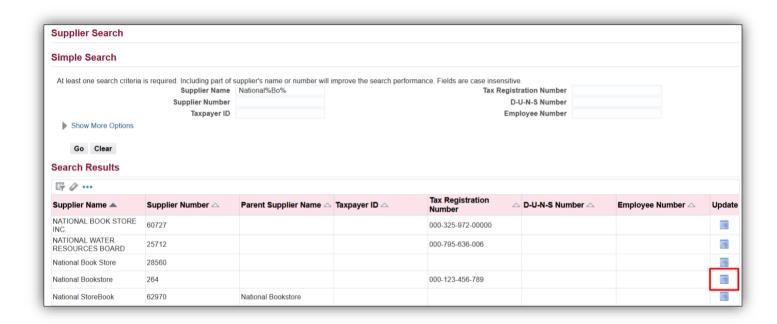


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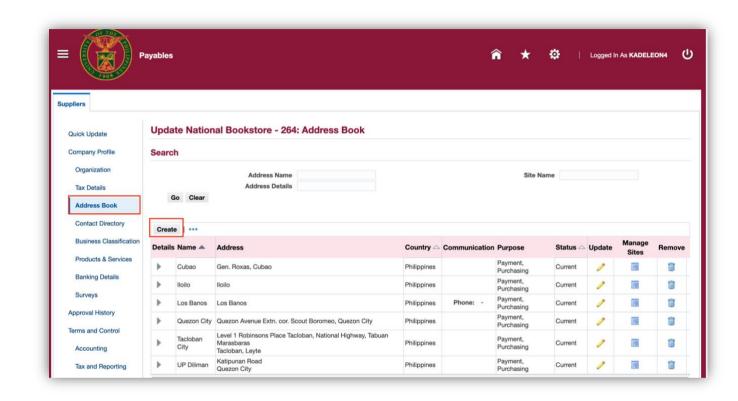
Step 3. From *UIS Home Page*, choose the *Supplier Manager* responsibility.

Click Entry.



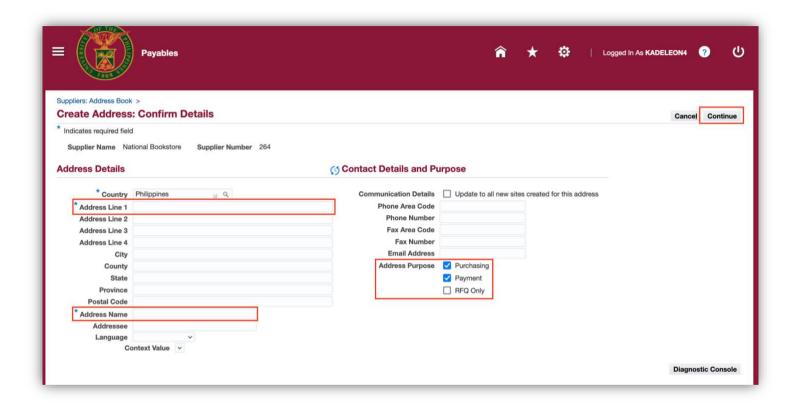
Step 4. On the *Supplier Search* page, search for the existing supplier then click the *Update* icon.

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Step 5. Go to the *Address Book* tab.

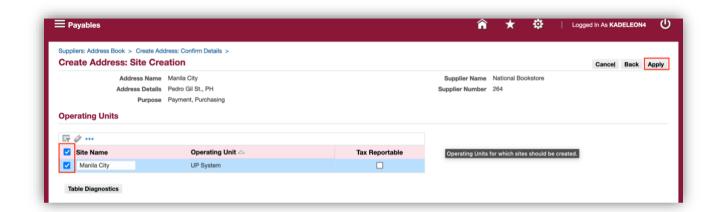
Then, click the *Create* button.



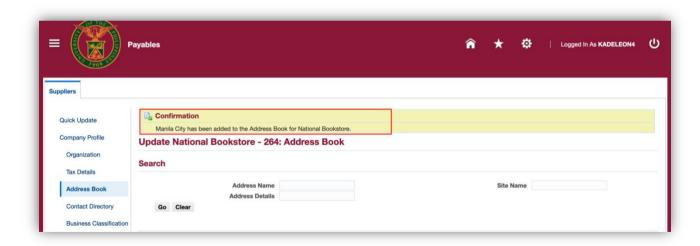
Step 5. Fill out the necessary details such as:

- Address Line 1
- Address Name
- Address Purpose tick the checkboxes for:
 - Purchasing
 - o Payment

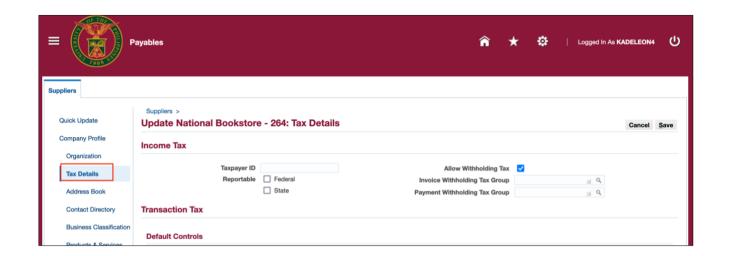
Once done, click Continue.



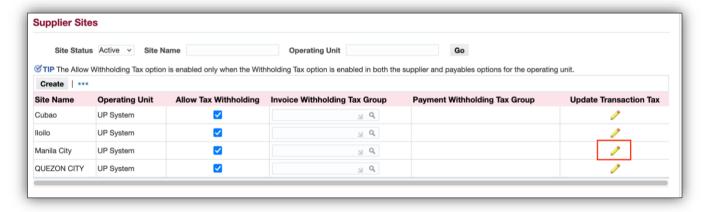
Step 6. Tick the box on the left side of the *Site Name* then click *Apply*.



You will notice a confirmation note stating that you are done adding a new address in the supplier address book.

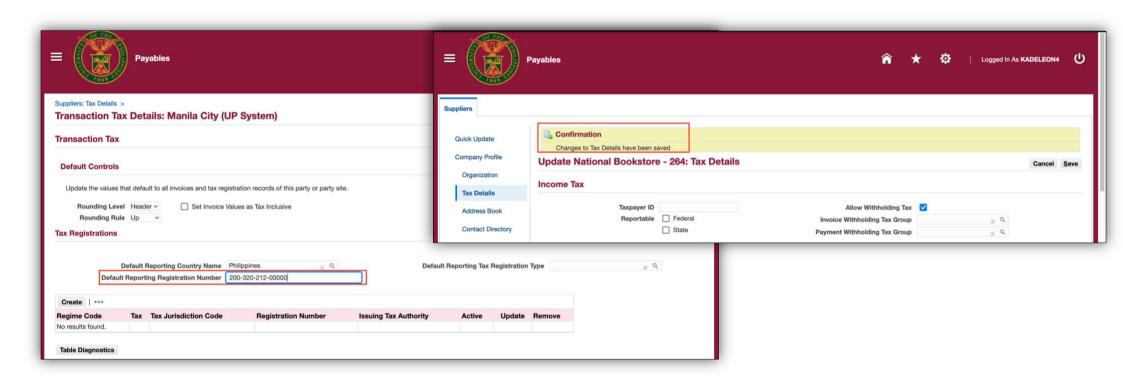


Step 7. Next, go to Tax Details.



Step 8. Scroll down until you see the *Supplier Sites*.

Click **Update** ______.



Step 9. Enter the branch TIN in the **Default Reporting Registration Number** field.

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Click Save.

A Confirmation note will appear that means you are done saving the branch supplier.

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Registration of a UP Internal Supplier

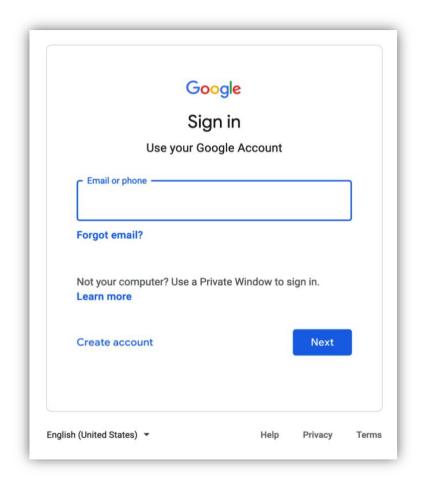
1. DOCUMENT CONTROL

1.3 Change Record

Date	Author	Version	Change Reference:	
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08 August 2018	Cherie Anne R. Pasco Julius A. Ermitanio	2.0	Updated field descriptions and modified instructions Updated screenshots	

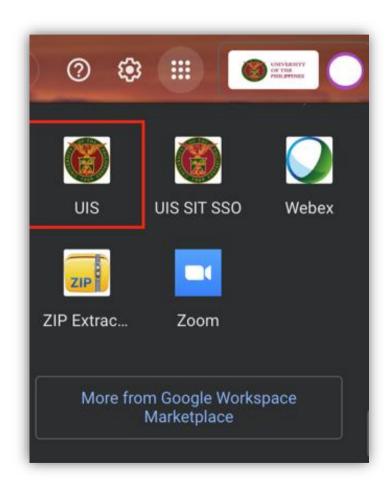
1.4 Description

Process ID			
Process Name	Registration of UP Internal Suppliers		
Functional Domain	Accounts Payables Module		
Responsibility	Supplier Manager		
Purpose	To register a new UP employee, contractual, or job order as a supplier in the system		
Data Requirement	Supplier information. Minimum requirements are as follows: • Full name • Tax Identification Number (TIN) – BIR issued • Bank Account		
Dependencies	The UP internal supplier should have a Person Record in HRIS		
Scenario	A UP employee, contractual or job order will be registered as an internal supplier if they are payees of DVs, entitled to cash advance, liquidations and reimbursements.		
	Warning: Registering UP internal suppliers as standard suppliers will affect closing of cash advances since the DV for cash advance (prepayment DV) could not be applied to the liquidation (expense report).		

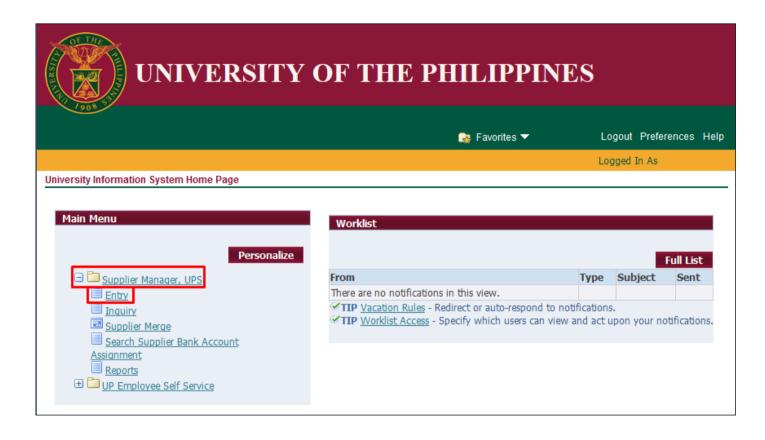


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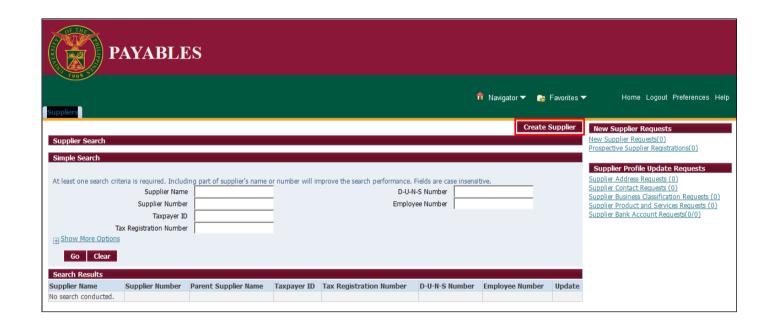


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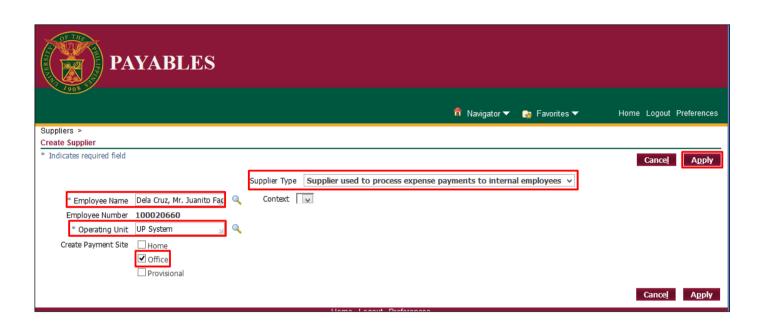


Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the *Entry*



Step 4. Supplier Home Page will appear the click Create Supplier



Step 5. Create Supplier Window will appear

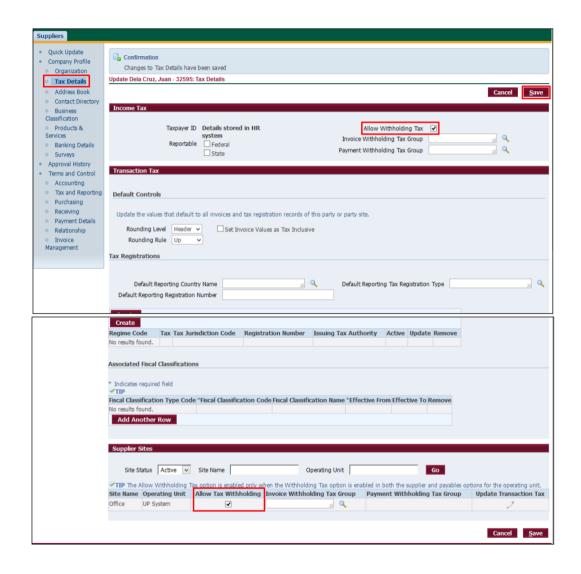
Change the **Supplier Type** to "Supplier used to process expense payments to internal employees."

Fill out the necessary details

Then click Apply

Note: The UP employee, contractual or job order is now registered as an internal supplier in UIS.

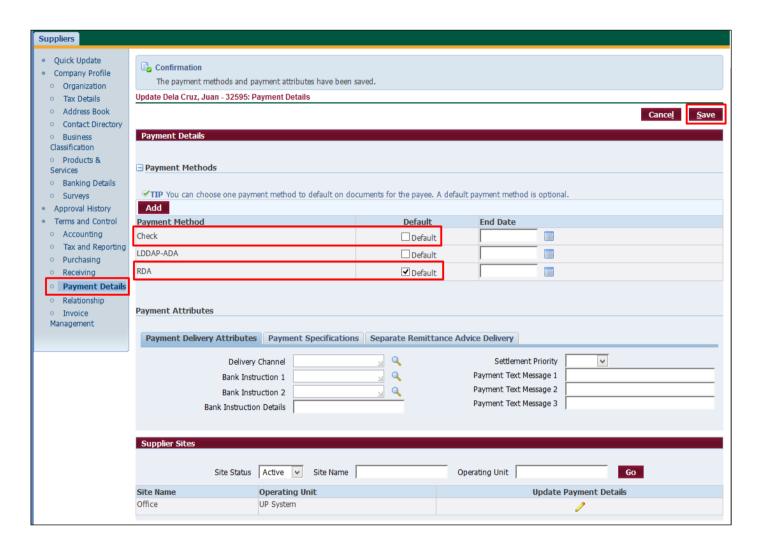
Field Name	Description	Remarks
Supplier Type	Must be set to "Supplier used to process	List of Values (LOV)
	expense payments to internal employees"	
Employee Name	Registered name in HRIS	List of Values (LOV)
Operating Unit	Constituent University or Level 1 Unit	List of Values (LOV)
Create Payment Site	Office	Checkbox



Step 6.Click *Tax Details* on the left sidebar of the *Suppliers* tab.

Please tick the *Allow Withholding Tax* and *Allow Tax Withholding* checkboxes
at the top and bottom regions of the page.

Then, click Save

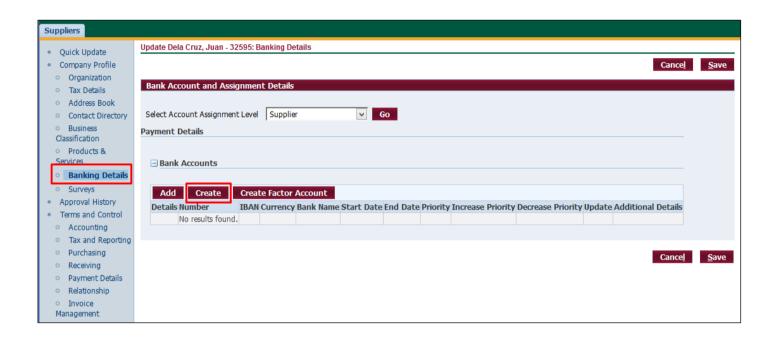


Step 7.Click *Payment Details* on the left sidebar of the *Suppliers* tab.

Choose a default *Payment Method* by ticking the checkbox beside it.

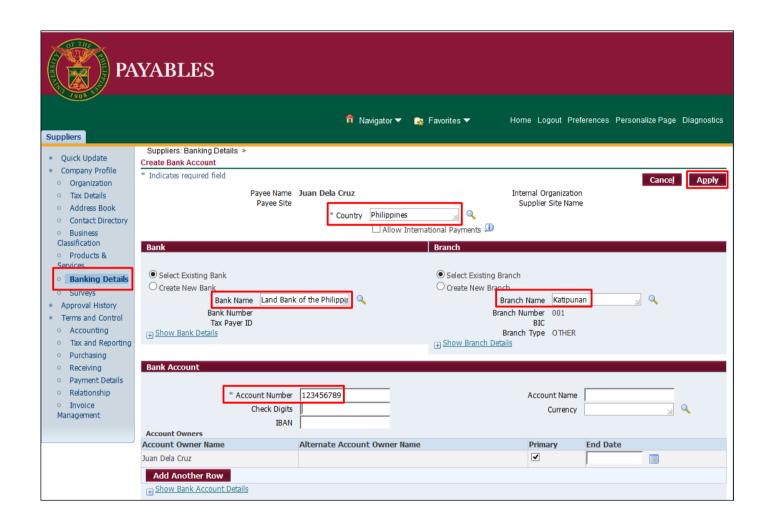
Then, click Save.

Note: For Internal Suppliers, either the **Check** payment method or **RDA** payment method is set as default.



Step 8. Click *Banking Details* on the left sidebar of the *Suppliers* tab.

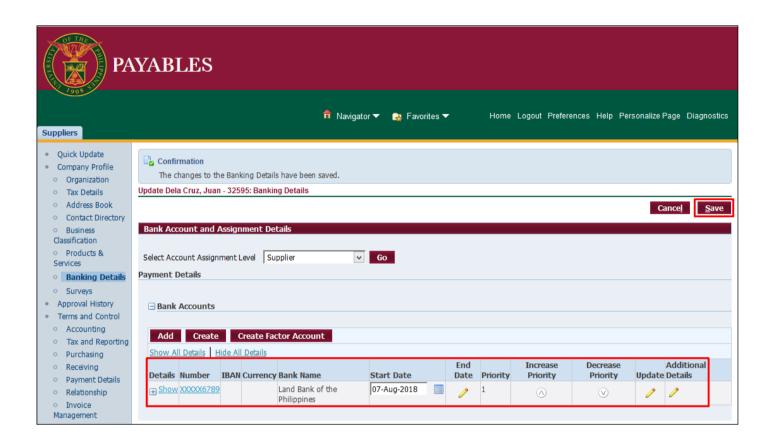
Then, click Create.



Step 9. The Create Bank Account page will appear.

Fill-in the necessary details including **Country**, **Bank Name**, **Branch Name** and **Account Number**.

Then, click Apply.



Step 10.On the Banking Details page click Save. Expected Result:

A UP employee, Contractual, or Job Order has been registered as a supplier in the system.

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Verification and Creation of Additional Supplier Site

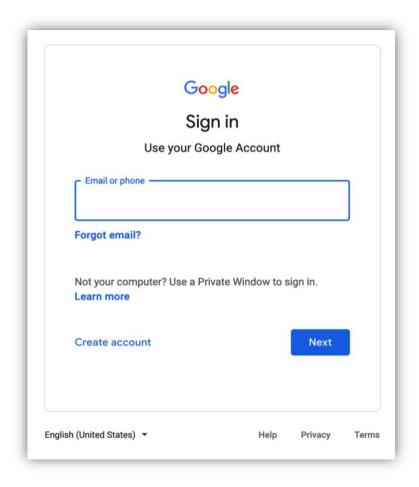
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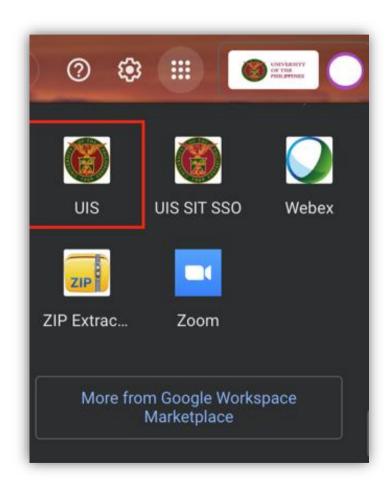
1.2 Description

Process ID		
Process Name	Verification and Creation of Additional Supplier Site	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	For the supplier to appear in multiple supplier sites. This will allow DV and PO originators from different CUs to view and select a supplier already registered by in CU.	
Data Requirement	 Supplier information such as Supplier ID Organization name – registered business name or Name of individual payee (UP employee, contractual or job order) 	
Dependencies	Supplier is already registered in UIS	
Scenario	Originating unit submits a request through the Supplier Registration Form for the registration of a supplier.	

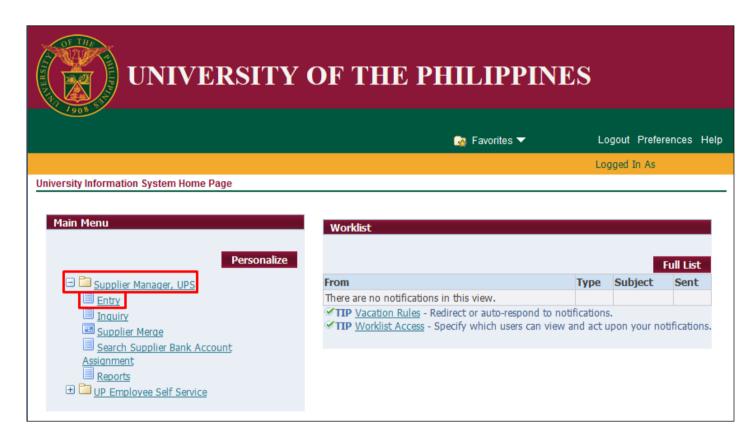


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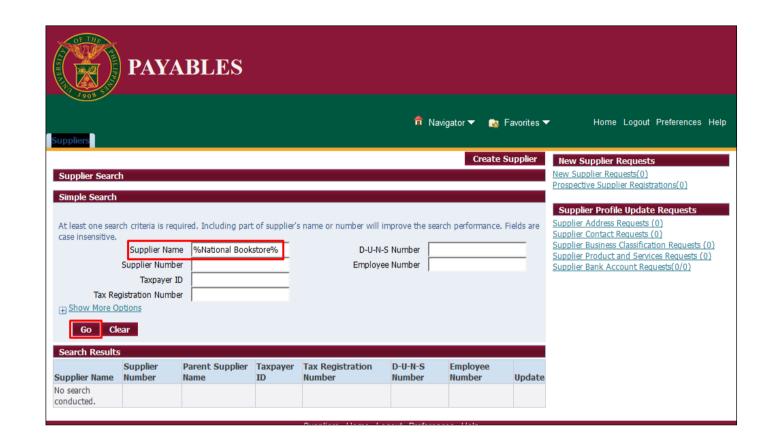


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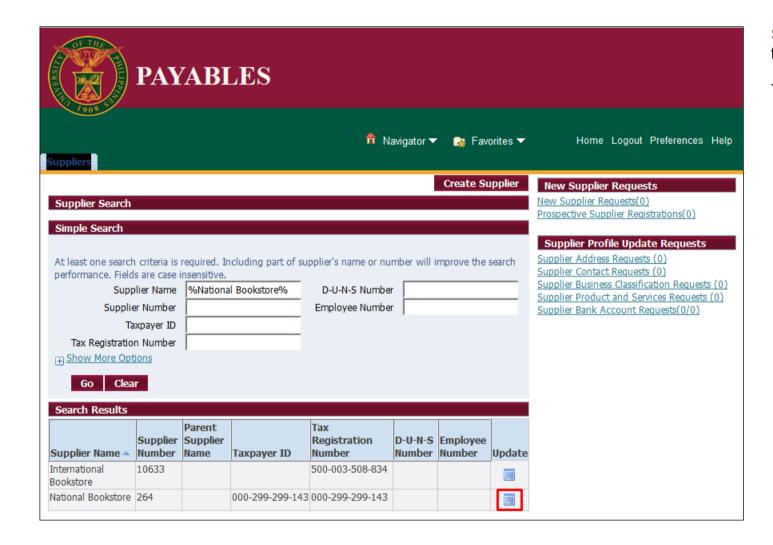


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Search for the supplier using any of the available fields. You may use % as a wildcard character.

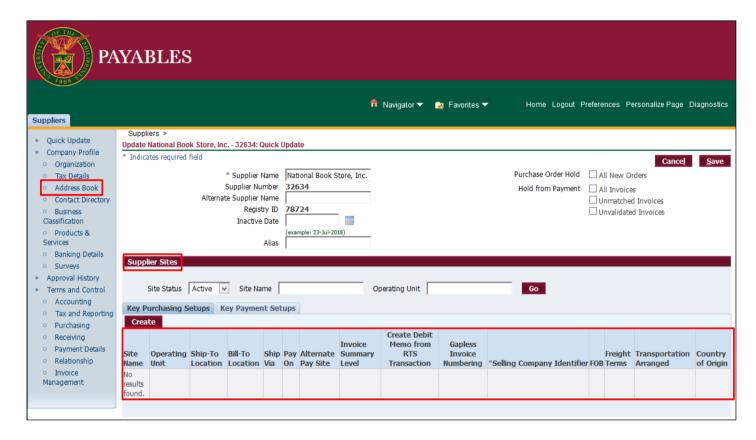
When searching for a *Supplier Name*, you may enter the name in between wildcard characters. For example, *%National Bookstore%*.

Then, click Go.



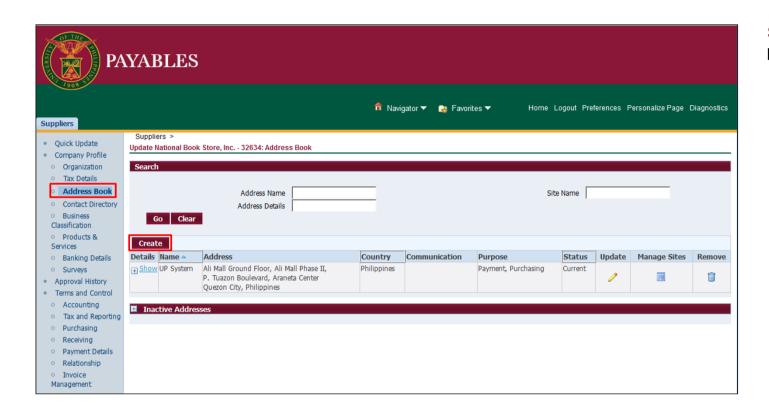
Step 5. Identify the supplier from the **Search Results**

Then click on the *Update* icon.

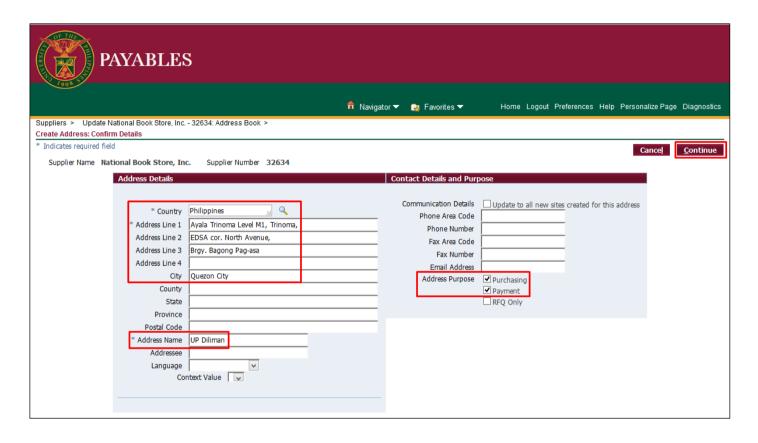


Step 6. The Quick Update page will appear

then check the **Supplier Sites** region. If there is no entry, proceed to the **Address Book**.



Step 7. On the Address Book page click on Create.



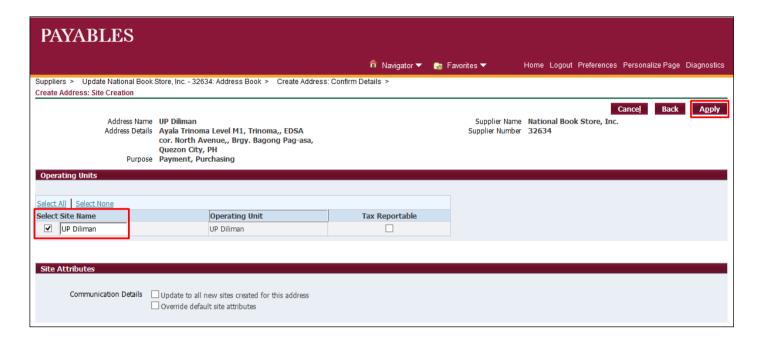
Step 8. The *Create Address:* Confirm Details page will appear

Fill-in required details.

For the *Address Name*, enter the constituent university or level 1 unit such as UP System, UP Diliman, etc.

For the *Address Purpose*, make sure that the checkboxes for *Purchasing* and *Payment* are ticked.

Then, click Continue.



Step 9. The Create Address: Site Creation page will appear

For *Standard Suppliers*, select the appropriate *Site Name* by ticking the checkbox beside it.

Then, click Apply.

For *UP Internal Suppliers*, select *Office* as the *Expense Payment Site Name* then click *Go*.

Select the appropriate **Site Name** by ticking the checkbox beside it.

Then, click *Apply*Expected Result:

A new Supplier Site has been added to an existing Supplier.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Updating Supplier Information

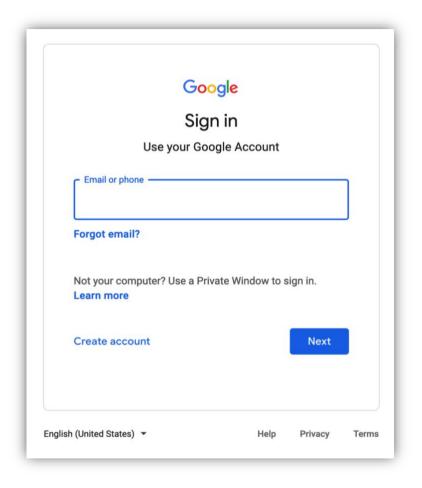
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
08 August 2018	Cherie Anne R. Pasco	1.0	Initial
15 November 2019	Julius Ermitanio	1.1	Added steps on how to remove supplier site

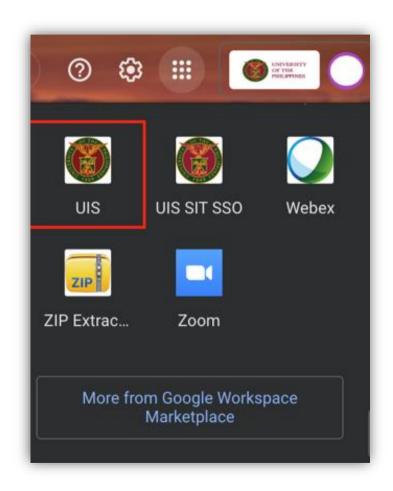
1.2 Description

Dragge ID		
Process ID		
Process Name	Updating Supplier Information	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	To keep supplier records up-to-date, supplier manager may change, remove or add details to a registered supplier.	
Data Requirement	 Supplier information such as Supplier ID Organization name – registered business name or Name of individual payee (UP employee, contractual or job order) 	
Dependencies	Changes in the name of UP Internal Suppliers will only reflect if changes are made to the HRIS Person Record	
Scenario	Originating unit, SPMO, Accounting Office or Cash Office submits a request through the Supplier Registration Form for the updating of supplier information	

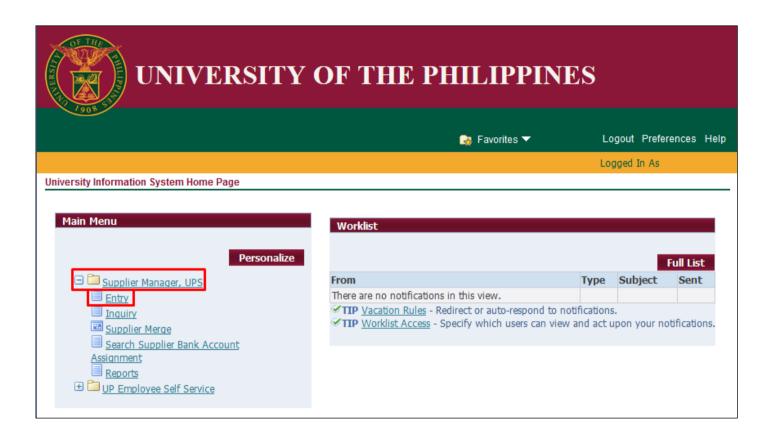


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. email and password)

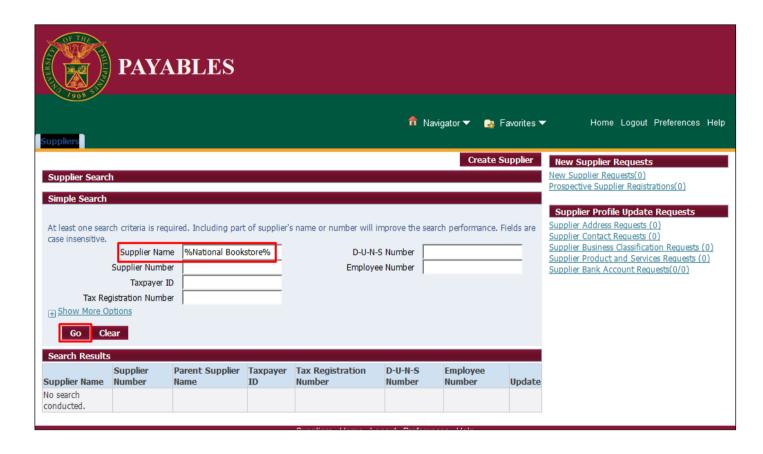


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the *Entry*

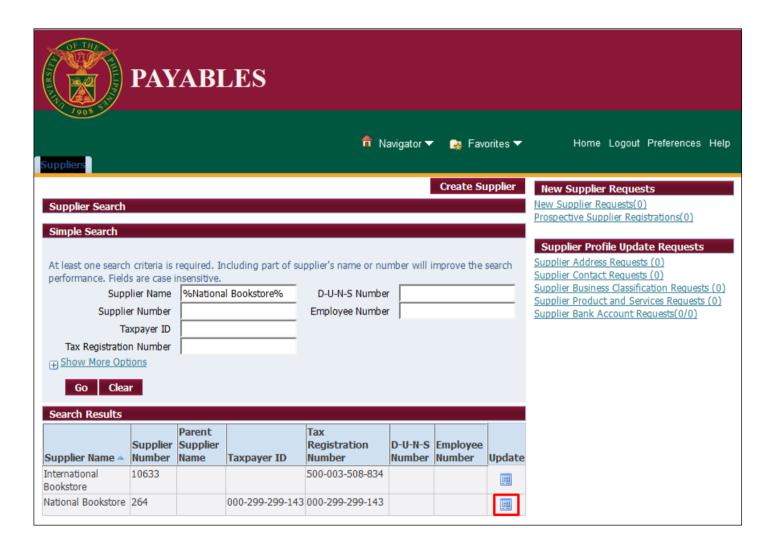


Step 4. Supplier Home Page will appear.

Search for the supplier using any of the available fields. You may use % as a wildcard character.

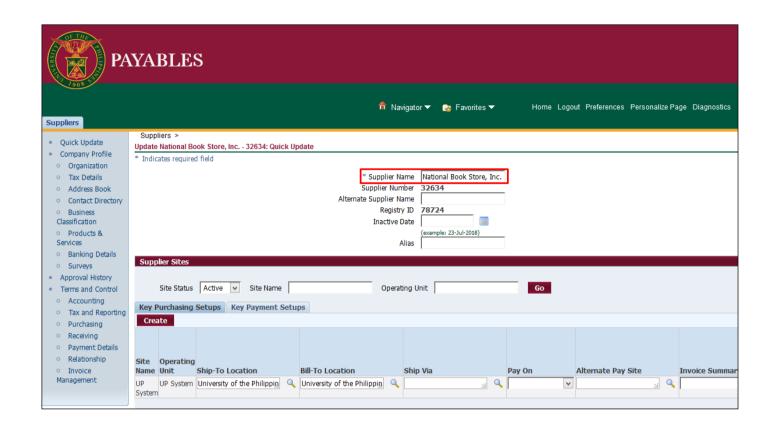
When searching for a **Supplier Name**, you may enter the name in between wildcard characters. For example, *%National Bookstore%*.

Then, click Go.



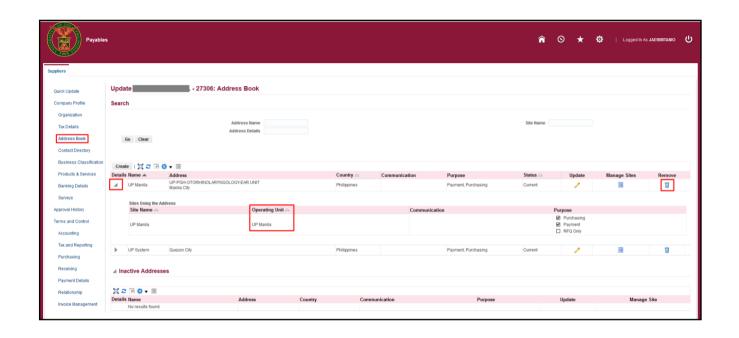
Step 5. Identify the supplier from the **Search Results**

Then click on the *Update* icon.



Step 6. The **Quick Update** page will appear

For standard suppliers, the **Supplier Name** and **Alternate Supplier Name** may be updated. Any changes made will reflect on existing FMIS transactions.



Step 7.

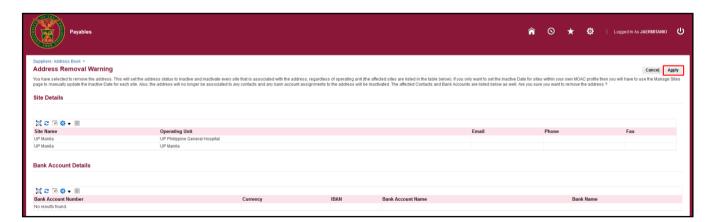
Remove Supplier Site.

Go to **Address Book** tab.

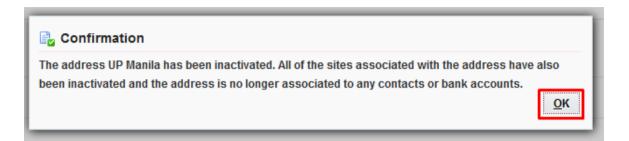
Select the supplier site you want to remove.

Verify the Operating unit by clicking the expand button below Details.

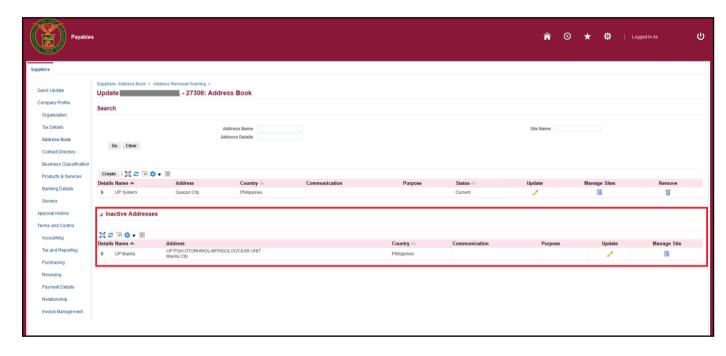
Then click **Remove** button.



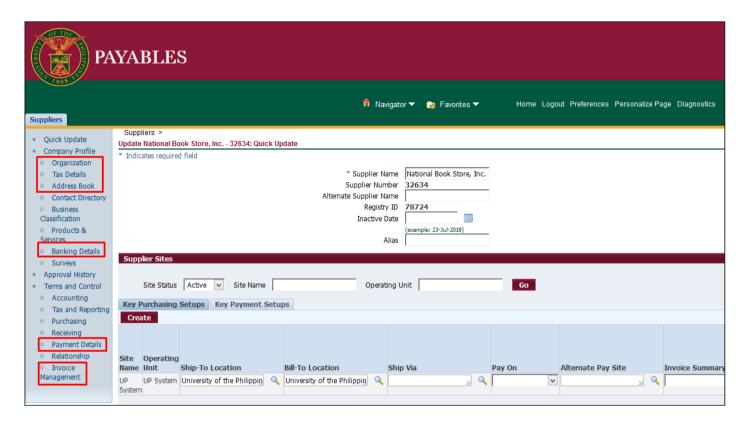
Step 8. Click Apply.



Step 9. Confirmation that the Supplier site was deactivated will appear. Click *Ok*.



The deactivated supplier site will be listed under **Inactive Addresses**.



Step 10. Select the appropriate menu from the left side bar to update other supplier details.

After making necessary changes, click on *Apply* or *Save* for the changes to take effect.

Expected Result:

The information of an existing Supplier has been updated.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Registration of Supplier Email for Separate Remittance Advices

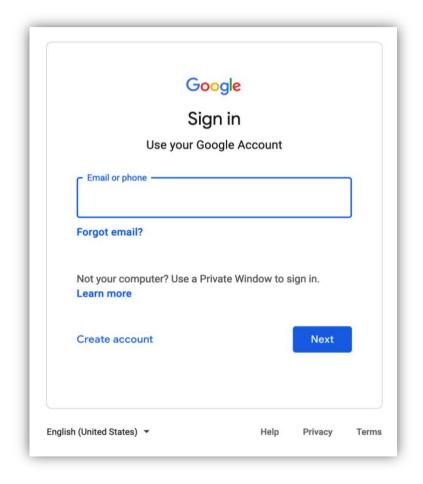
1. DOCUMENT CONTROL

1.3 Change Record

Date	Author	Version	Change Reference:
08 March 2024	Riza Nequias	1.0	Initial

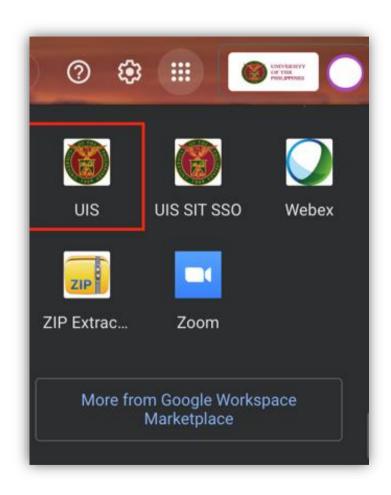
1.4 Description

Process ID	
Process Name	Registration of Supplier Email for Separate Remittance Advices
Functional Domain	Accounts Payables Module
Responsibility	Supplier Manager
Purpose	To register a supplier email account for receiving Separate Remittance Advices
Data Requirement	Supplier email account
Dependencies	Registered supplier in the system
Scenario	The supplier manager will add an email account to an existing supplier record in the system to receive email notices regarding DV payments.

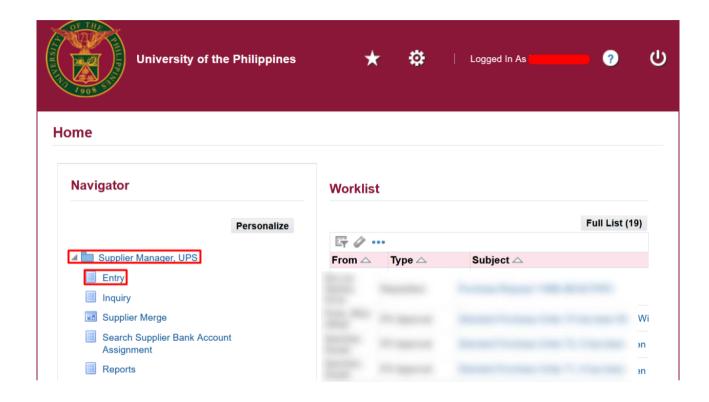


Step 1. Go to https://uis.up.edu.ph

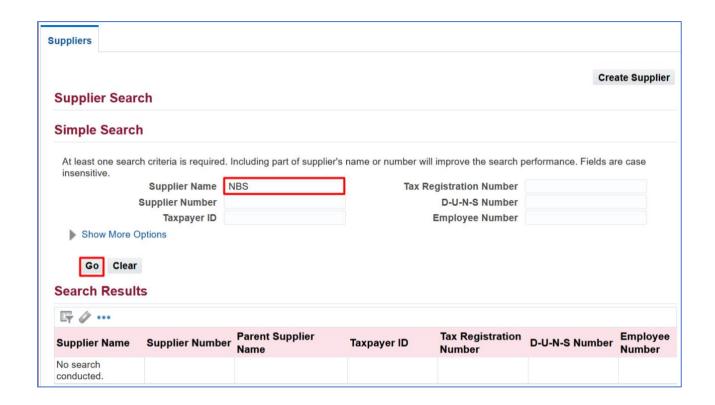
Step 2. Log-in your UP Mail credentials (e.g. email and password)



Or you may open your UP Mail and go to the Google Workspace and select **UIS.**

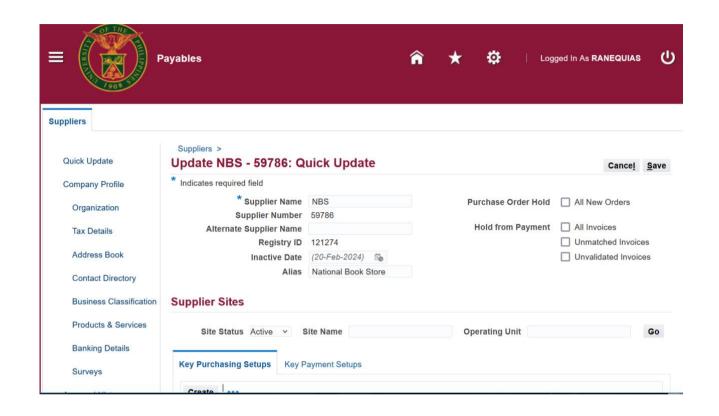


Step 3. On the *UIS Home*Page, navigate to Supplier
Manager > Entry.

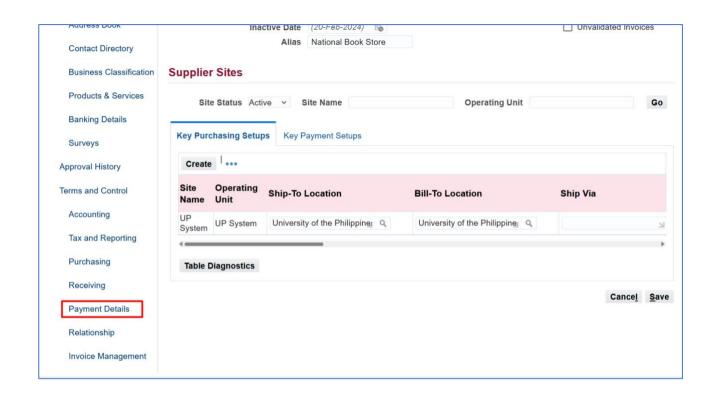


Step 4. Search for the supplier by entering the name in the **Supplier Name** field.

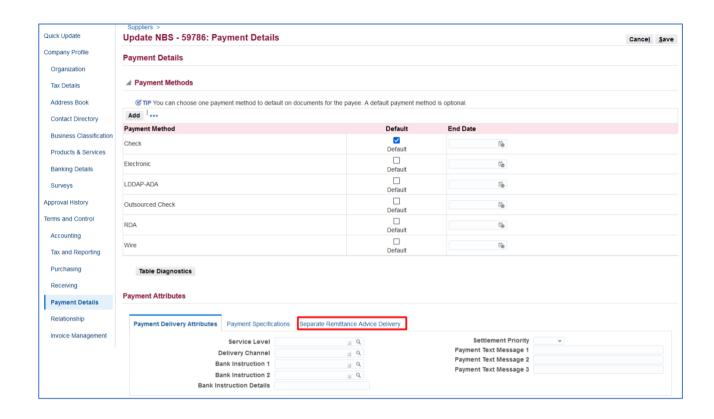
Then, click Go.



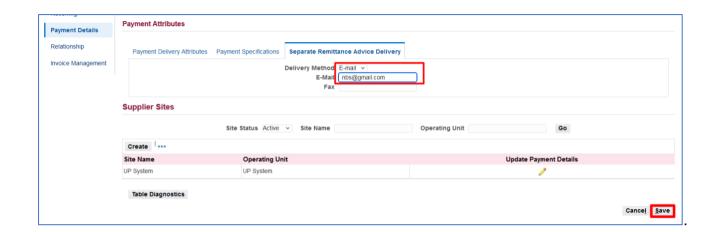
You will be directed to the **Quick Update** page.



Step 5. Scroll down, select Payment Details.

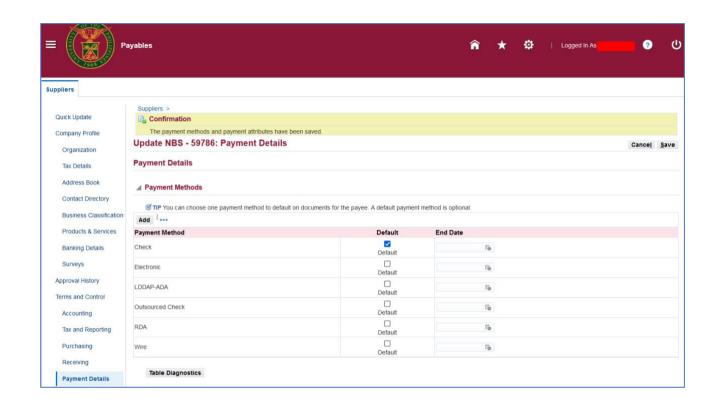


Then, go to the **Separate Remittance Advice Delivery**tab under the **Payment Attributes** region.



Step 6. Set the *Delivery Method* to *E-mail*.

Enter the *E-mail* of the supplier, then *Save*.



Expected Result:

A confirmation will appear that the payment methods and payment attributes have been saved.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Running the Employee Update Program

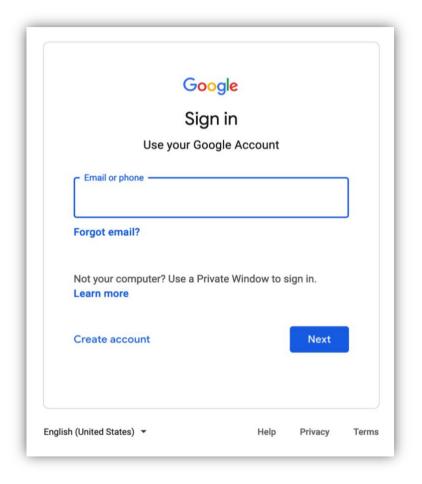
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
28 August 2018	Cherie Anne R. Pasco	1.0	Initial

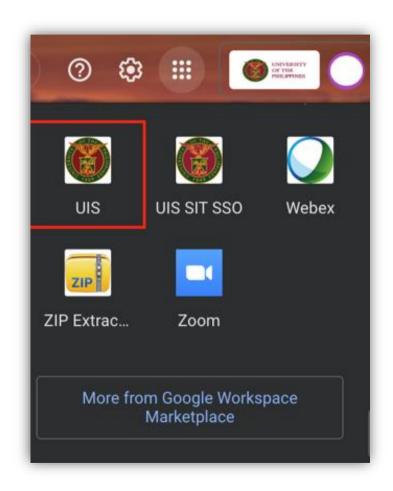
1.2 Description

Process ID		
Process Name	Running the Employee Update Program	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	To keep UP internal supplier records up-to-date based on changes made to the HRIS Person Record	
Data Requirement	 Supplier information such as Supplier ID Name of individual payee (UP employee, contractual or job order) 	
Dependencies	Changes in the name of UP Internal Suppliers will only reflect if changes are made to the HRIS Person Record	
Scenario	Originating unit submits a request to HRDO for updating or correction of employee name and applies changes to the HRIS Person Record. For the changes to appear in the Payables Supplier list, the Employee Update Program must be run by the Supplier Manager. This may be done regularly by the Supplier Manager.	

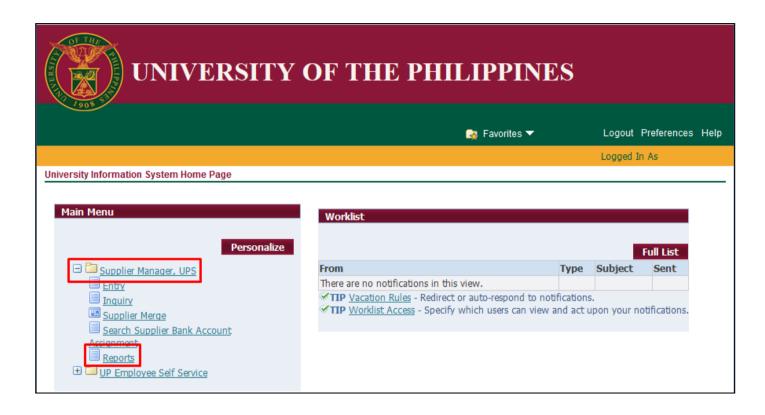


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. email and password)

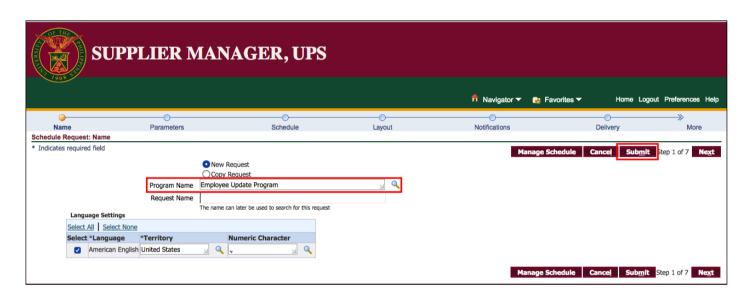


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

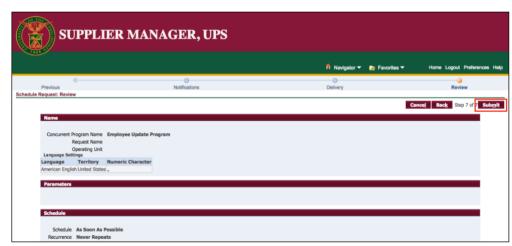
then click the Reports

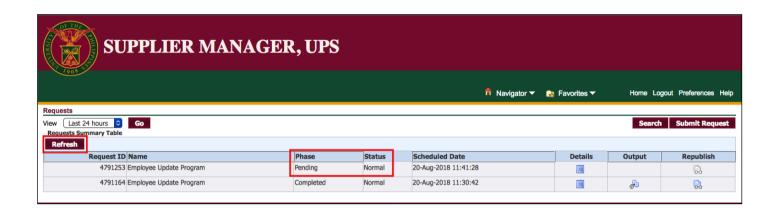


Step 4. The Schedule Request Page will appear.

On the **Program Name**, search and select **Employee Update Program**.

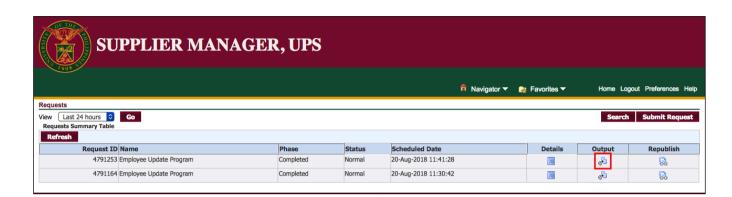
Then, click Submit.



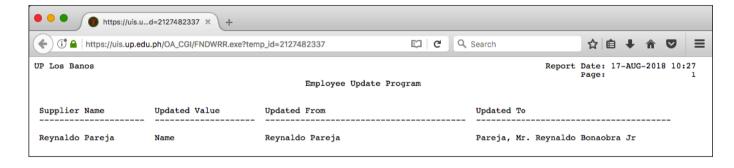


Step 5. On the Requests
Summary Table, the Phase
Status should be Completed
Normal.

Click **Refresh** to update the status.



Sample Output



Step 6. Once the program has completed running, click the *Output* icon to view the updated Employee Supplier.

Expected Result:

The information of an existing UP Internal Supplier has been updated.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Merging Standard Suppliers

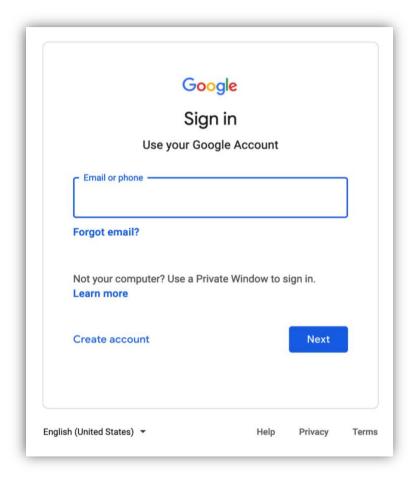
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
-	-	1.0	Initial
08 August 2018	Cherie Anne R. Pasco Julius A. Ermitanio	2.0	Updated field descriptions and modified instructions Updated screenshots

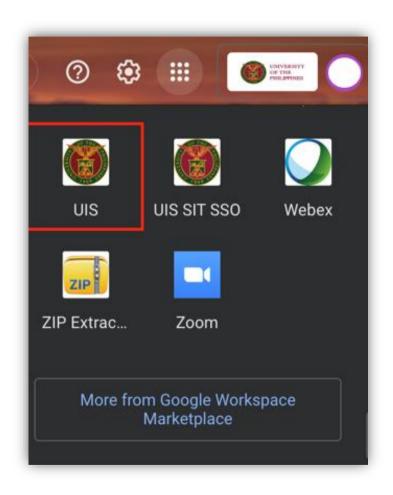
1.2 Description

Process ID	
Process Name	Merging Suppliers
Functional Domain	Accounts Payables Module
Responsibility	Supplier Manager
Purpose	To keep supplier records up-to-date and eliminate duplications.
Data Requirement	Supplier information such as
	Supplier ID
	 Organization name – registered business name
Dependencies	Supplier was registered multiple times in the system using different names
Scenario	During supplier registration, the Supplier Manager must first check if the supplier being registered is already on the list of suppliers. If this step was overlooked, it is possible that there will be duplications as shown in the figures below.

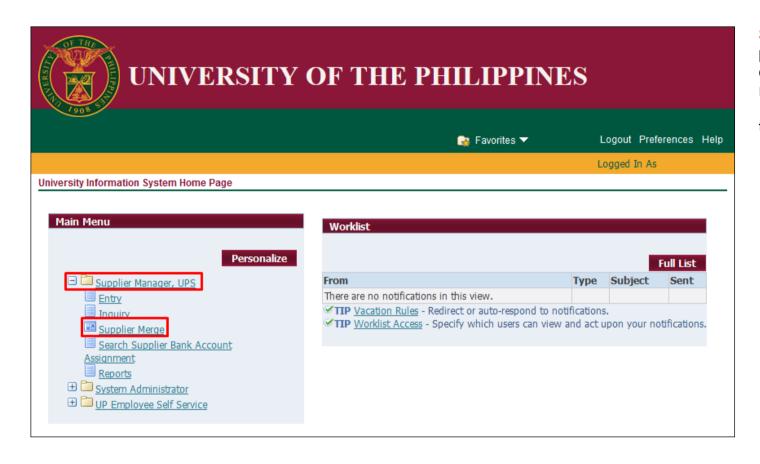


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. email and password)

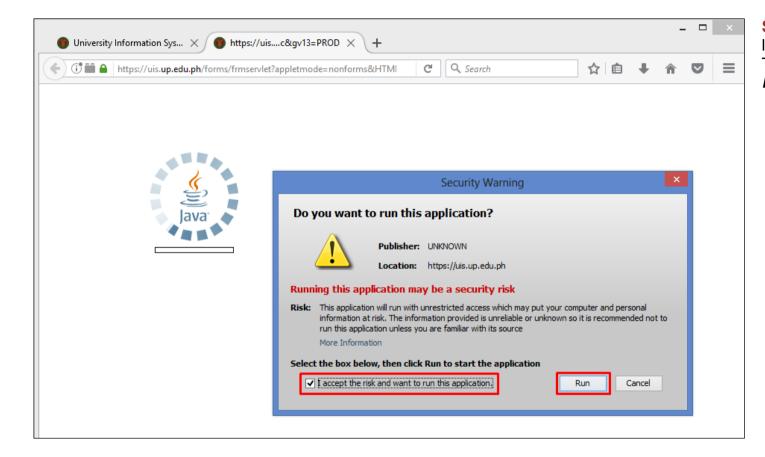


Or you may open your UP Mail and go to the Google Workspace and select **UIS**

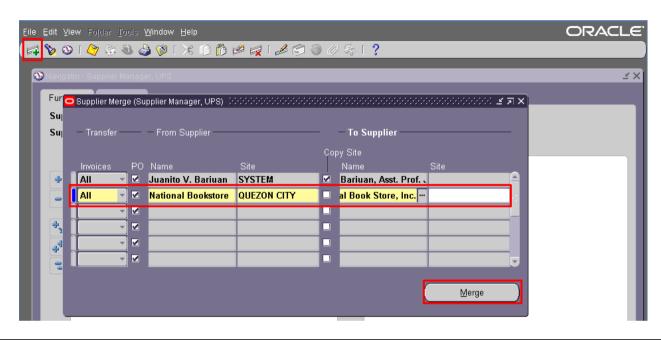


Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the Supplier Merge



Step 4. Java application will launch with **Security Warning**. Tick the checkbox and click **Run**.

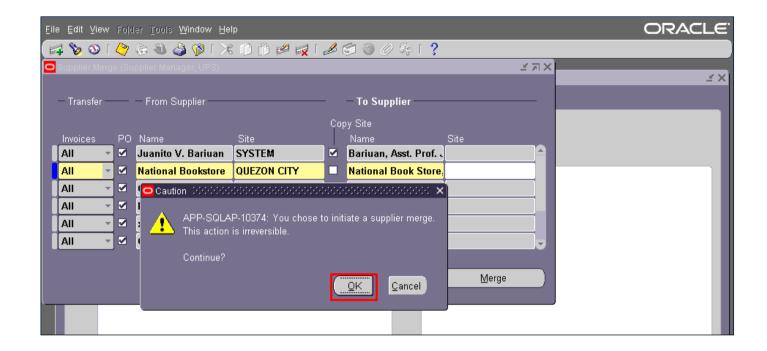


Step 5. The **Supplier Merge** window will open.

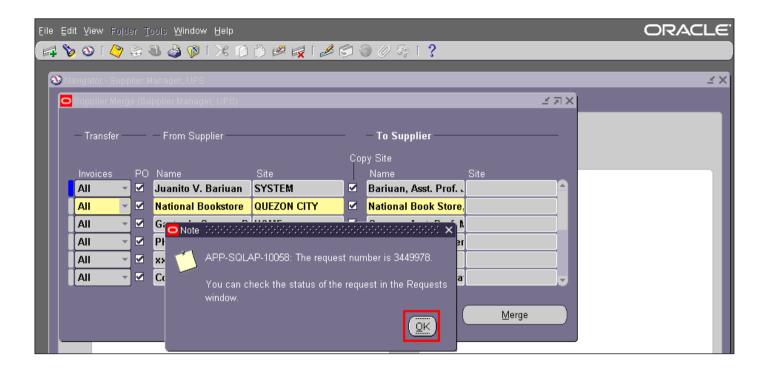
Click **New** and fill-in the necessary details.

Then, click Merge.

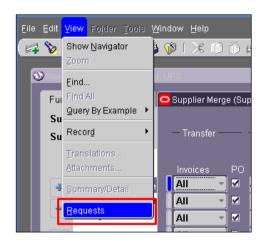
Field Name	Description	Remarks
Invoices	Transcations which will be updated upon	Select All to update all DVs
	merging of suppliers	using the same supplier
		List of Values (LOV)
From Supplier:	Registered business name of the supplier to	List of Values (LOV)
Name	be eliminated	
	Example:National Book Store	
From Supplier: Site	Site of the supplier to be eliminated	List of Values (LOV)
To Supplier: Name	Registered business name of the supplier to	List of Values (LOV)
	be retained	
	Example: National Book Store, Inc.	
To Supplier: Site	Site of the supplier to be retained	List of Values (LOV)

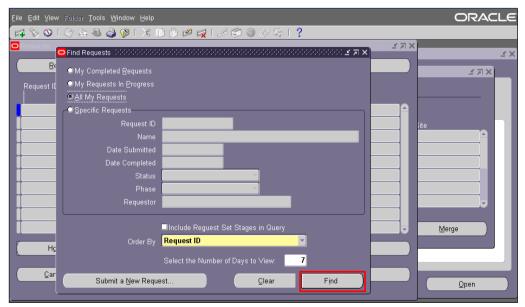


Step 6. A *Caution* window will appear. Click *Ok*.



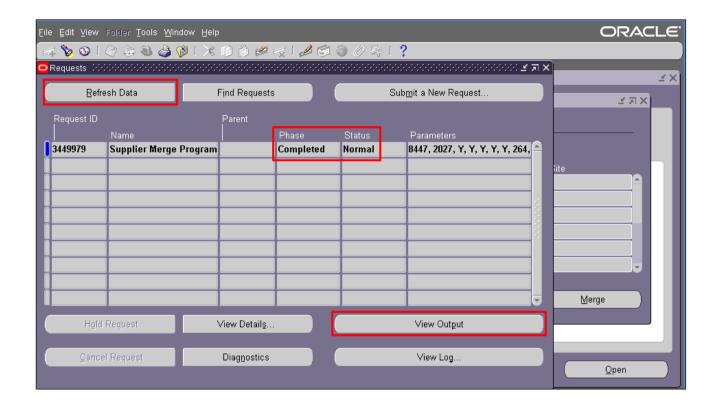
Step 7. A *Note* window will appear stating the request number. Take note of the request number and then click *Ok*.





Step 8. Click *View* on the toolbar. Then, select *Requests*.

Step 9. *Find Requests* page will appear. Click *Find*.



Step 8. The *Requests* window will appear.

Click the **Refresh Data** button on the upper left side of the window until the **Phase** becomes **Completed** and **Status**, **Normal**.

Then click View Output button.

Once the request is completed, verify that the suppliers have been merged by searching for the supplier.

Expected Result:

Duplicate Suppliers has been merged into one.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Tagging a Supplier as Inactive

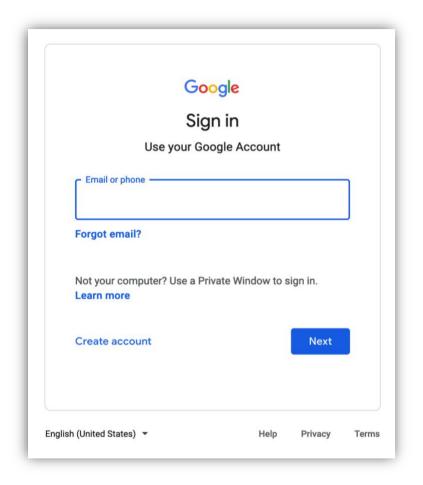
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
08 August 2018	Cherie Anne R. Pasco	1.0	Initial

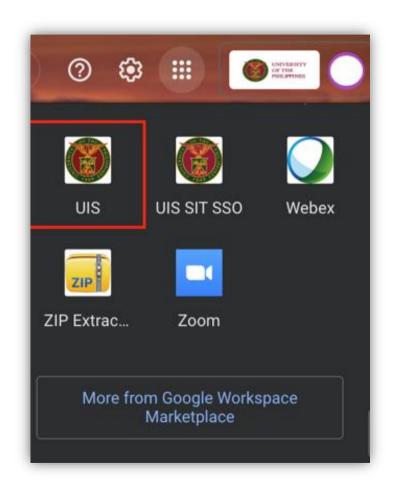
1.2 Description

Process ID		
Process Name	Tagging a Supplier as Inactive	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	To keep supplier records up-to-date, supplier manager may tag suppliers as inactive.	
Data Requirement	 Supplier information such as Supplier ID Organization name – registered business name or Name of individual payee (UP employee, contractual or job order) 	
Dependencies	Supplier is registered in the system	
Scenario	SPMO or HRDO identifies supplier, standard or internal, to be removed from the list of active suppliers	

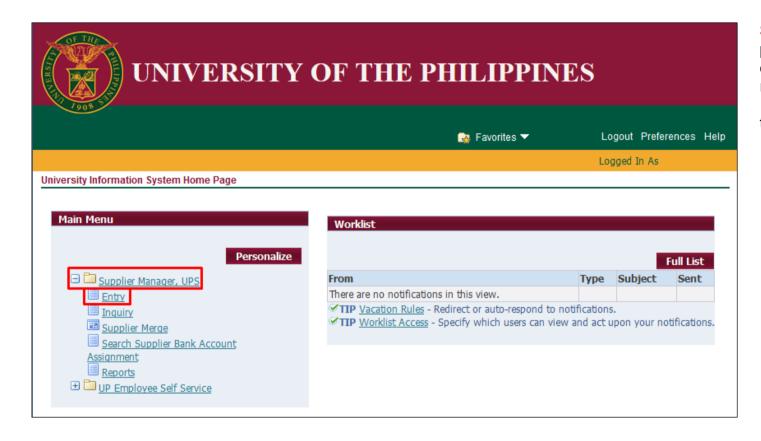


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *email* and *password*)

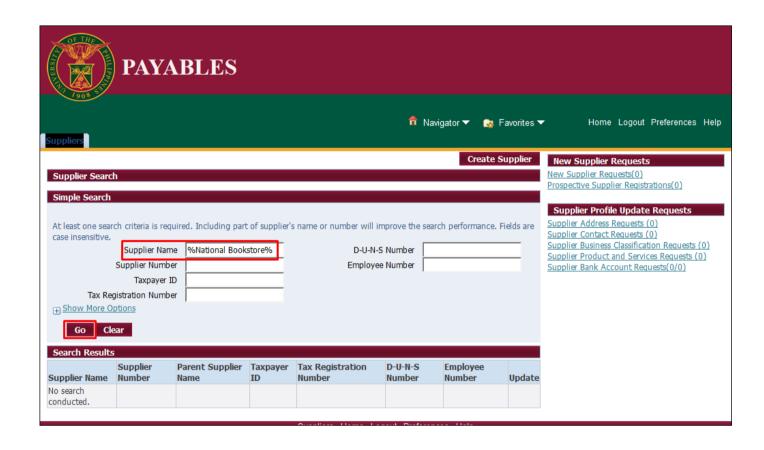


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

then click the Entry

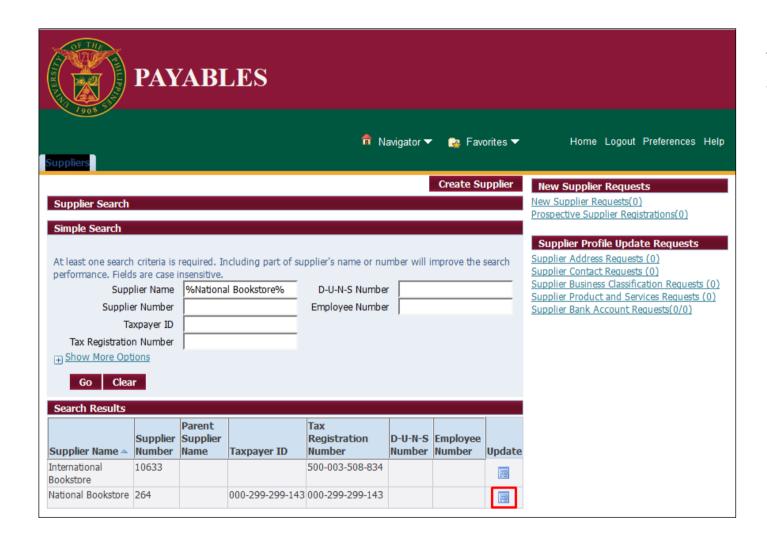


Step 4. Supplier Home Page will appear.

Search for the supplier using any of the available fields. You may use % as a wildcard character.

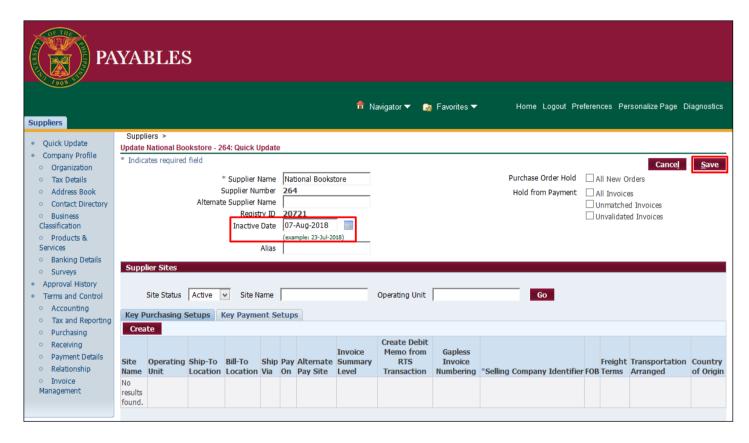
When searching for a **Supplier Name**, you may enter the name in between wildcard characters. For example, *%National Bookstore%*.

Then, click Go.



Step 5. Identify the supplier from the **Search Results**

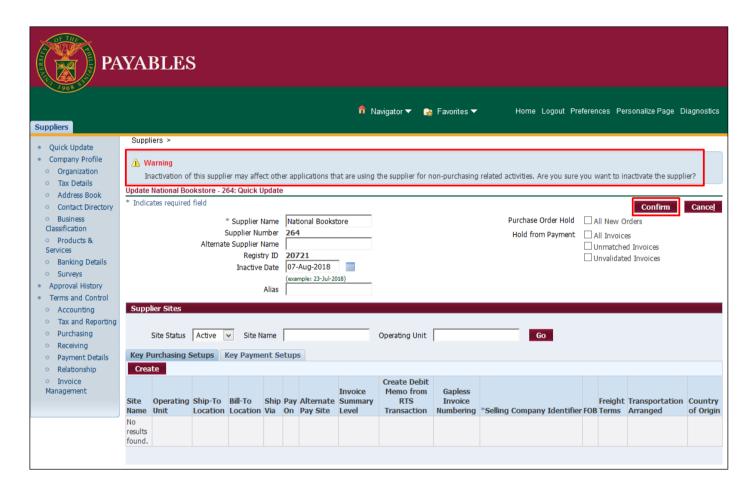
Then click on the *Update* icon.



Step 6. The **Quick Update** page will appear.

Enter Inactive Date.

Then, click Save.



Step 7. A *Warning Message* will appear.

Click Confirm.

The supplier is now inactive and will no longer appear in the list of suppliers available to transaction originators.

To reverse this process, simply remove the *Inactive Date* and click *Save*.

Note: Initiated DVs will not be affected by the change in supplier status.**Expected Result:**

An existing Supplier has been deactivated.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Generation of Reports

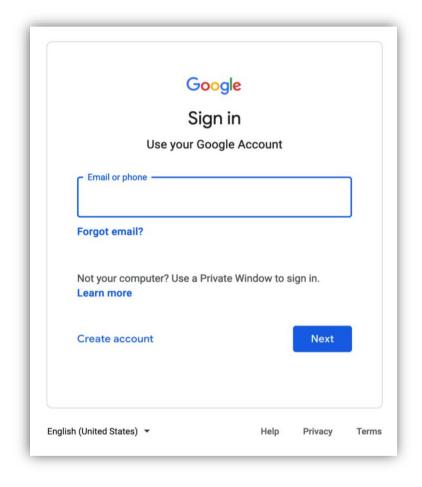
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
08 August 2018	Cherie Anne R. Pasco	1.0	Initial

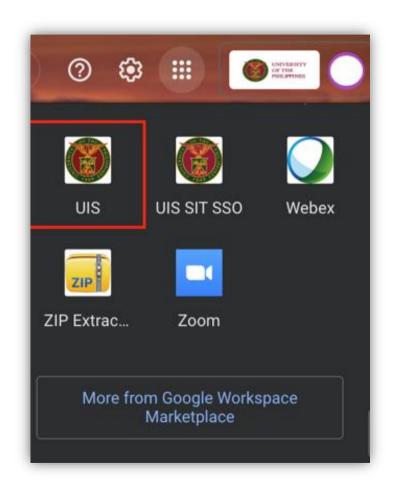
1.2 Description

Process ID	
Process Name	Generation of Supplier Audit Report
Functional Domain	Accounts Payables Module
Responsibility	Supplier Manager
Purpose	To aid in supplier records management and in identifying
	duplications in supplier registration
Data Requirement	None
Dependencies	None
Scenario	Supplier will facilitate regular maintenance of supplier records and
	eliminate identified duplications by merging suppliers.



Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *email* and *password*)

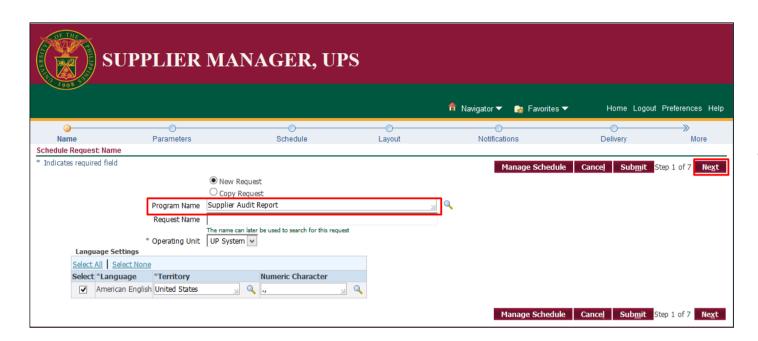


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

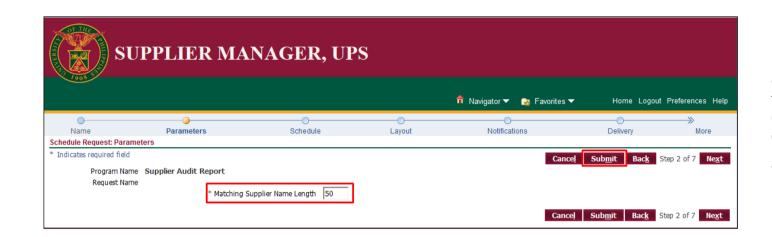
then click the Reports.



Step 4. The Schedule Request: Name page will appear.

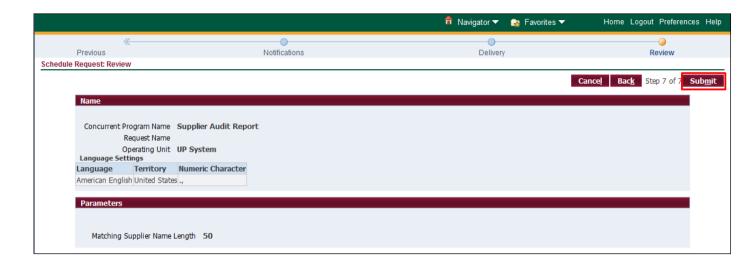
Search for the **Program Name**, **Supplier Audit Report**.

Then, click Next.



Step 5. Enter a value for the *Matching Supplier Name*Length. This is the number of characters in the supplier name that you want the system to compare to identify potential duplicate suppliers

Then, click Submit.

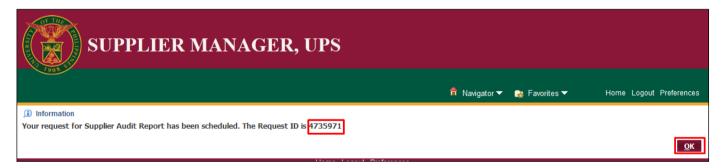


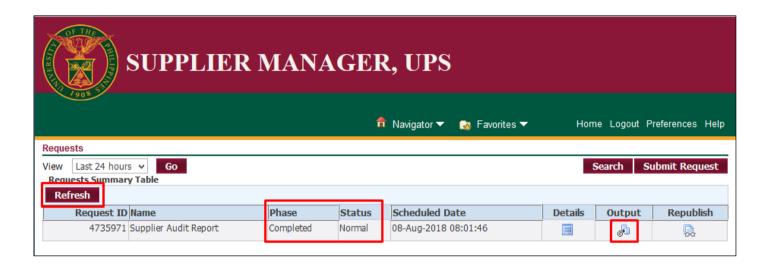
Step 6. Click Submit.

A message will appear with the corresponding *Request ID*.

Take note of this number.

Then, click Ok.





Step 8. The Requests
Summary Table will appear.

Click the **Refresh** button on the upper left side of the table until the **Phase** becomes **Completed** and **Status**, **Normal**.

Then click **Output** icon.

Expected Result:

Supplier Audit Report has been generated.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

Generation of UP List of Active Suppliers

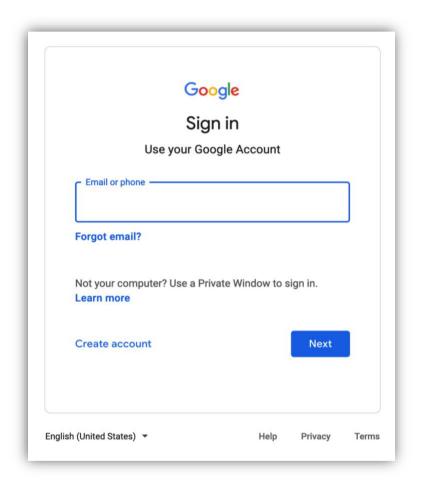
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
08 August 2018	Cherie Anne R. Pasco	1.0	Initial

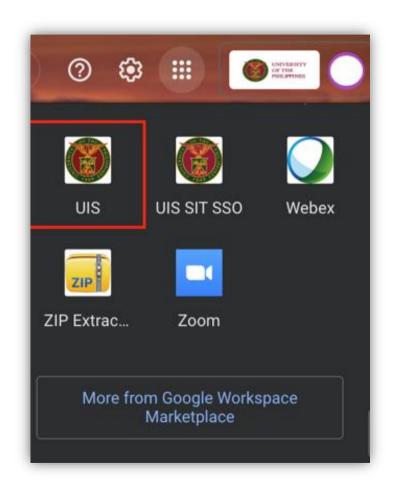
1.2 Description

Process ID		
Process Name	Generation of UP List of Active Suppliers	
Functional Domain	Accounts Payables Module	
Responsibility	Supplier Manager	
Purpose	To aid in supplier records management and in identifying	
	duplications in supplier registration	
Data Requirement	None	
Dependencies	None	
Scenario	Supplier will facilitate regular maintenance of supplier records and	
	eliminate identified duplications by merging suppliers.	

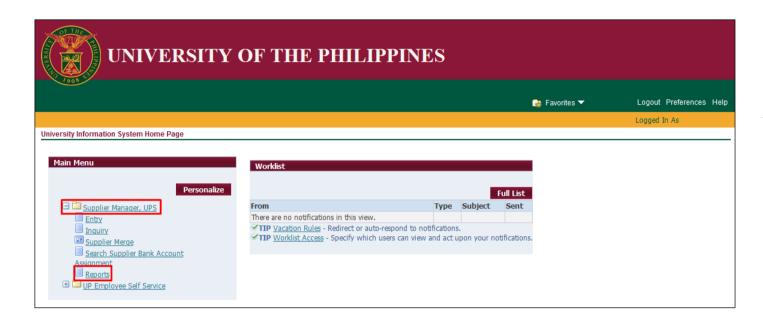


Step 1. Go to https://uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. email and password)

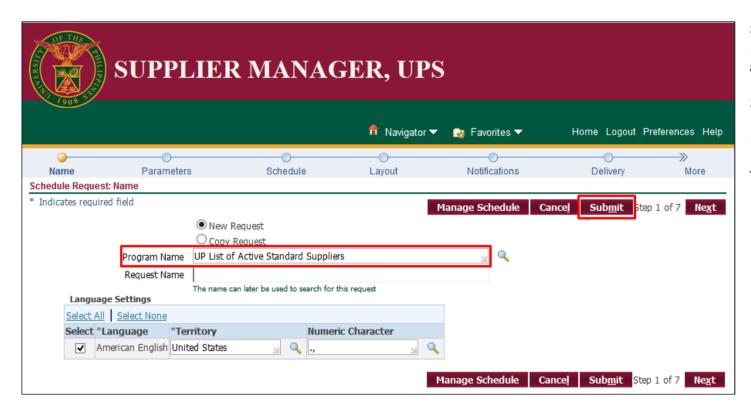


Or you may open your UP Mail and go to the Google Workspace and select **UIS**



Step 3. From *UIS Home Page* proceed to *Main Menu* and choose the *Supplier Manager* responsibility

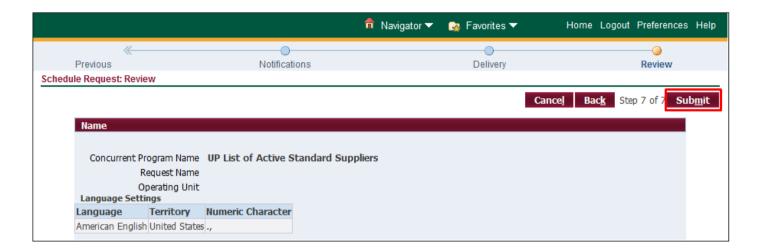
then click the Reports.



Step 4. The Schedule Request: Name page will appear.

Search for the **Program Name**, **UP List of Active Standard Suppliers**.

Then, click Submit.

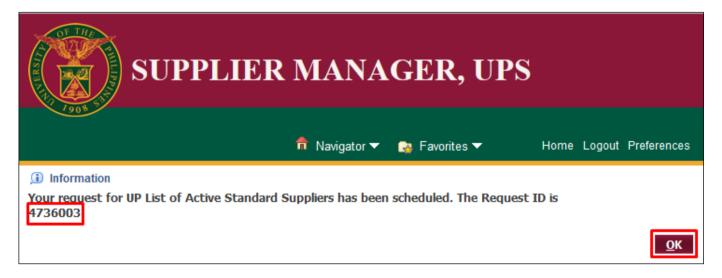


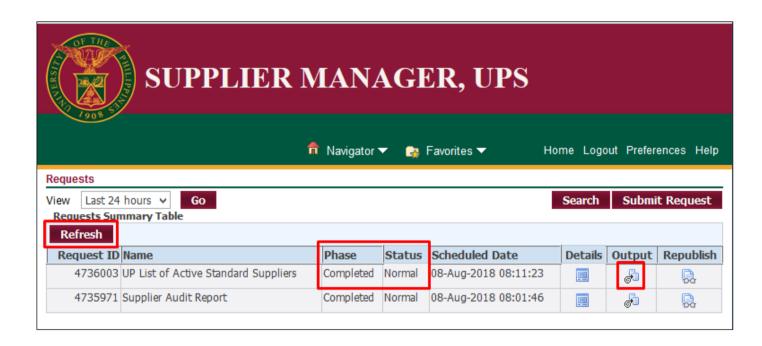
Step 5. Click Submit.

A message will appear with the corresponding *Request ID*.

Take note of this number.

Then, click Ok





Step 7. The Requests
Summary Table will appear.

Click the **Refresh** button on the upper left side of the table until the **Phase** becomes **Completed** and **Status**, **Normal**.

Then click **Output** icon.

Expected Result:

UP List of Active Suppliers report has been generated.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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