University of the Philippines

SPCMIS

Supplies, Procurement, and Campus Management Information System

CREATION OF PPMP FOR NON-COMMON USE ITEMS

SPCMIS User Manual
iProcurement

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Creation Date:	27 October 2014
Last Updated:	21 September 2022
Document Ref:	SPCMIS User Manual – Creation of PPMP for Non-Common Use Items
Version:	4.2

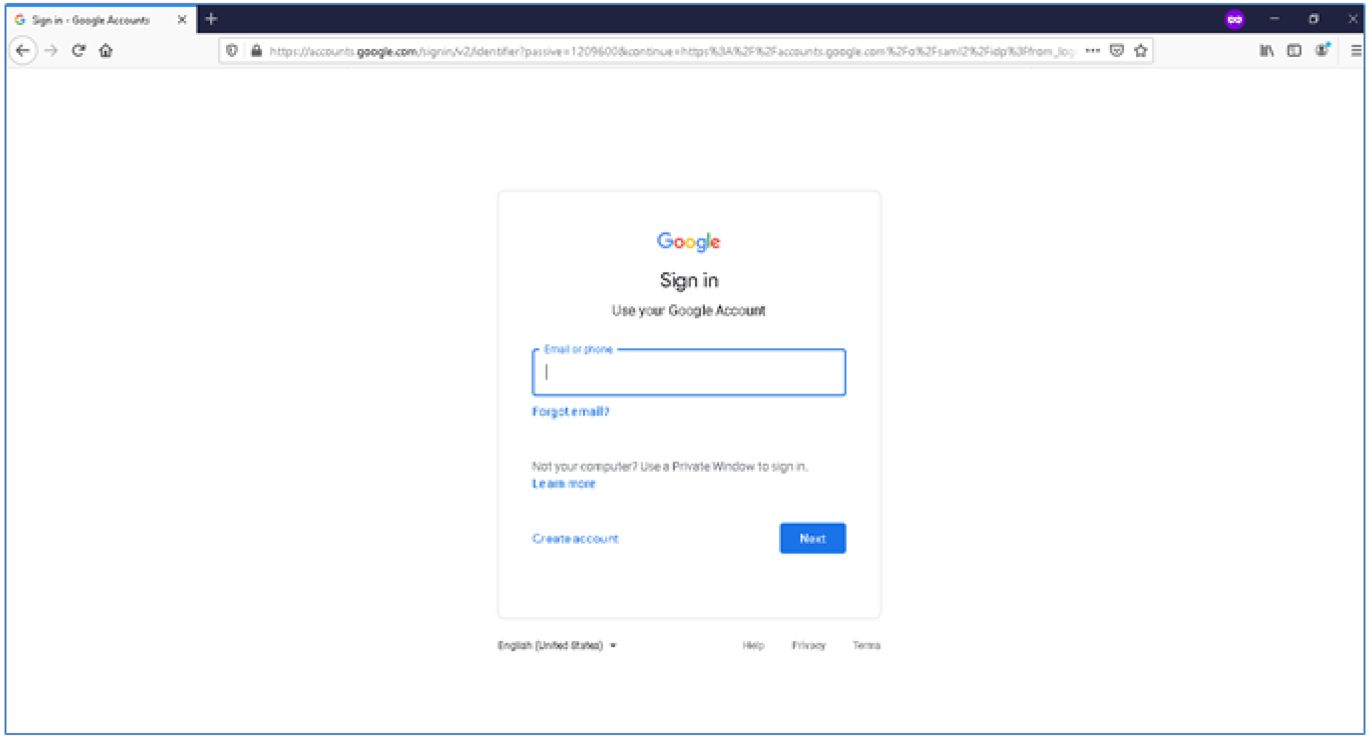
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Ver sion	Change Reference
27 October 2014	Julius Ermitanio & Michael Angelo Soliven	1.0	Initial
28 November 2014	Julius Ermitanio & Michael Angelo Soliven	2.0	Update
22 September 2016	Reah Mae Supnet & Carlo Martin Evangelista	3.0	Major Revision
28 February 2017	Reah Mae Supnet	3.1	Update
06 June 2019	Reah Mae Supnet	4.0	Major Update
20 August 2019	Reah Mae Supnet	4.1	Minor Revision
21 September 2022	Mico Alfred Puño	4.2	Minor Update: **Step 11 -** Updated Screenshots and added new step on how to select a Budget Estimation Option

2. Description

Manual ID	UMSP010531
Manual Name	Creation of PPMP for Non-Common Use Items
Information System	Supplies, Procurement, and Campus Management Information System
Functional Domain	iProcurement PPMP Requester
Purpose	To create an annual PPMP for Non-Common Use Items
Data Requirement	Items for inclusion in the plan
Dependencies	Charge Account Setup Approval Path Setup Purchase Order Information
Scenario	Unit staff needs to submit the annual PPMP for their office or unit
Author	Mico Alfred Puño



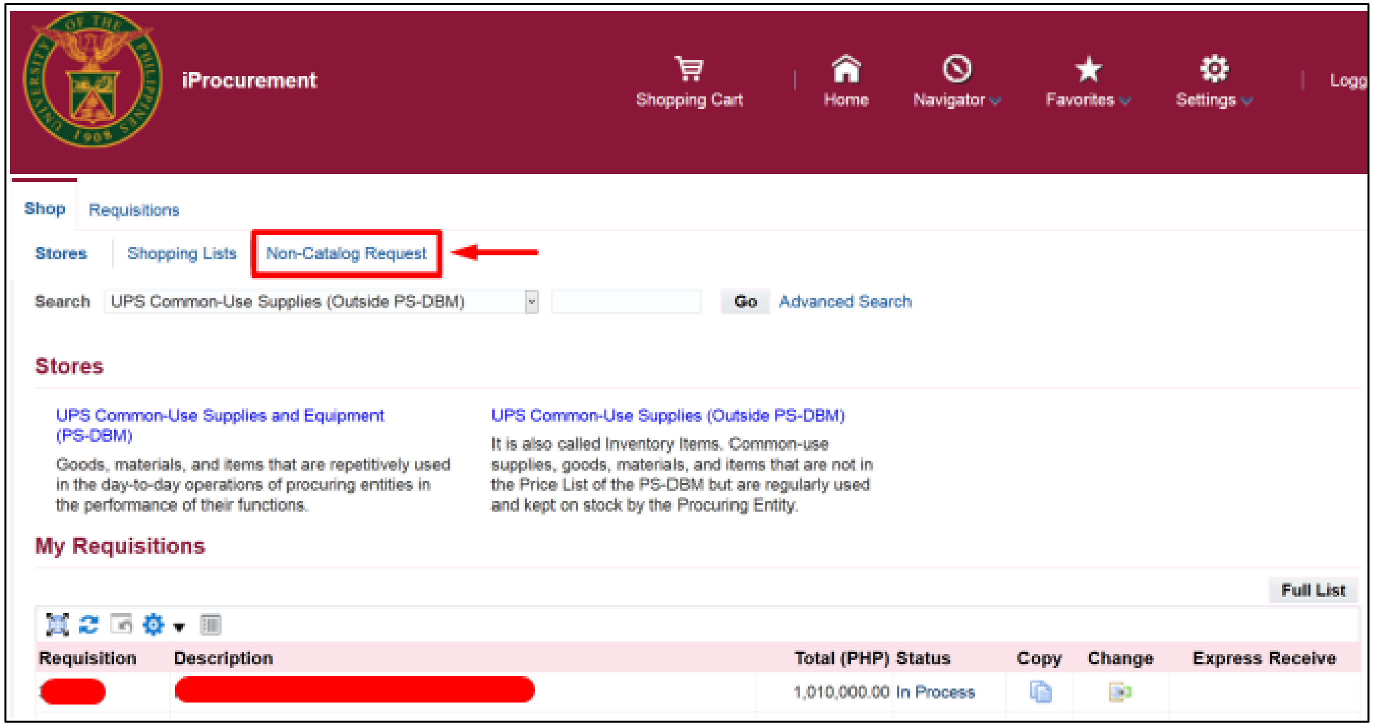
Step 1. Go to ***uis.up.edu.ph***

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

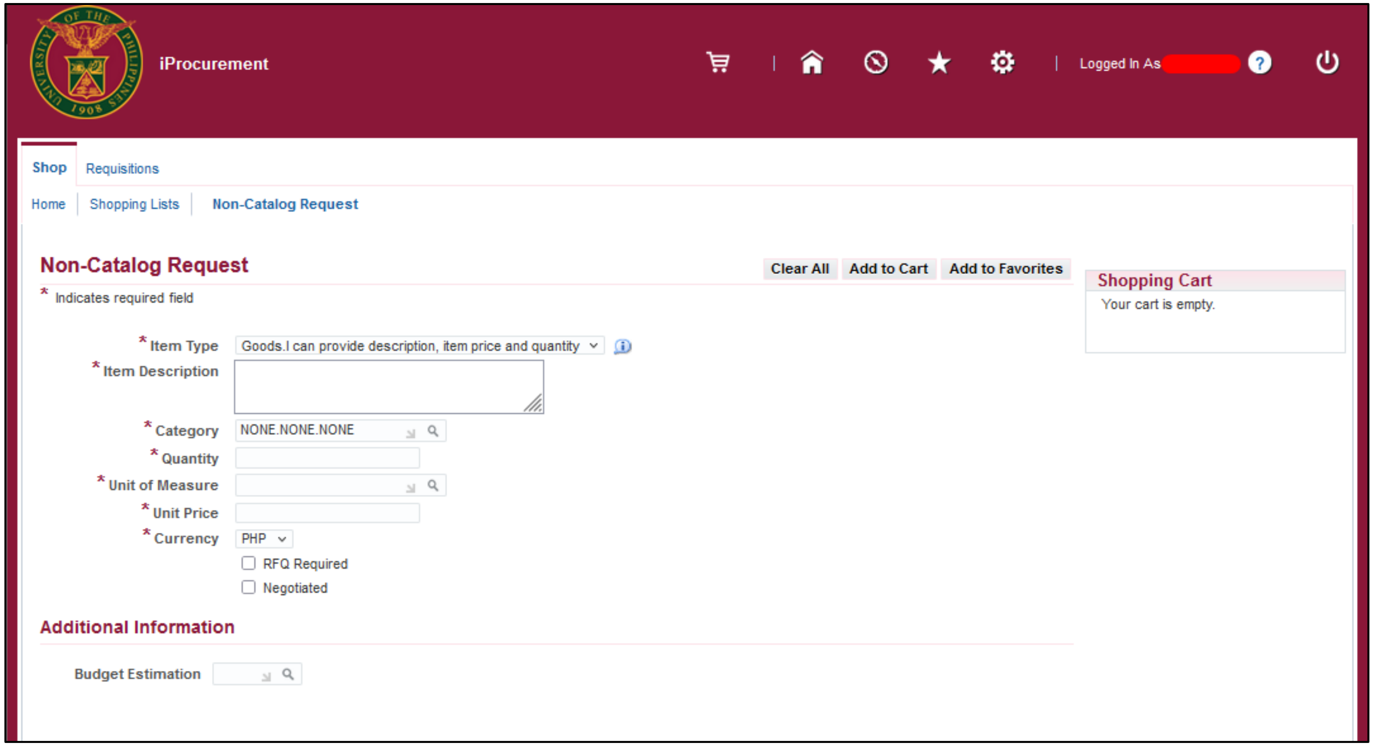
Step 3. On the homepage, go to Main Menu and select

iProcurement PPMP Requester, UP.

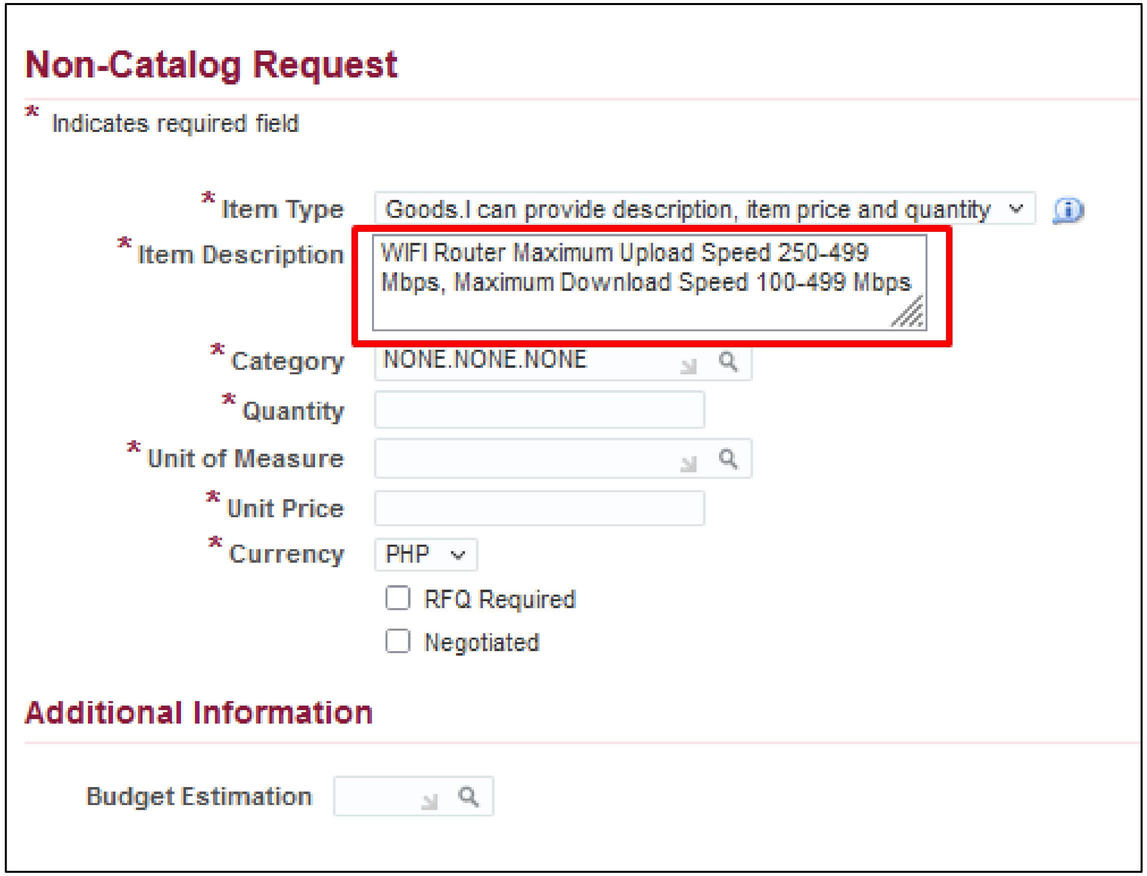
Step 4. Select ***iProcurement Home Page.***



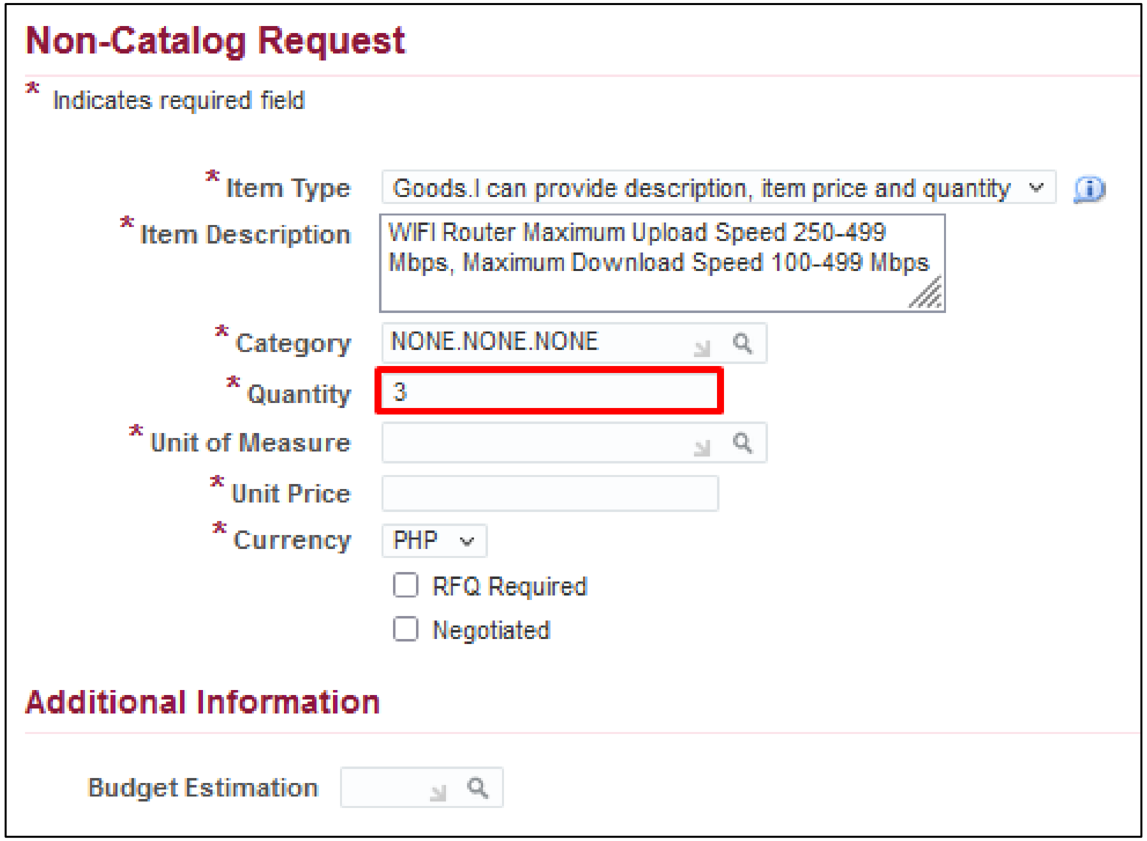
Step 5. Select ***Non-Catalog Request***.



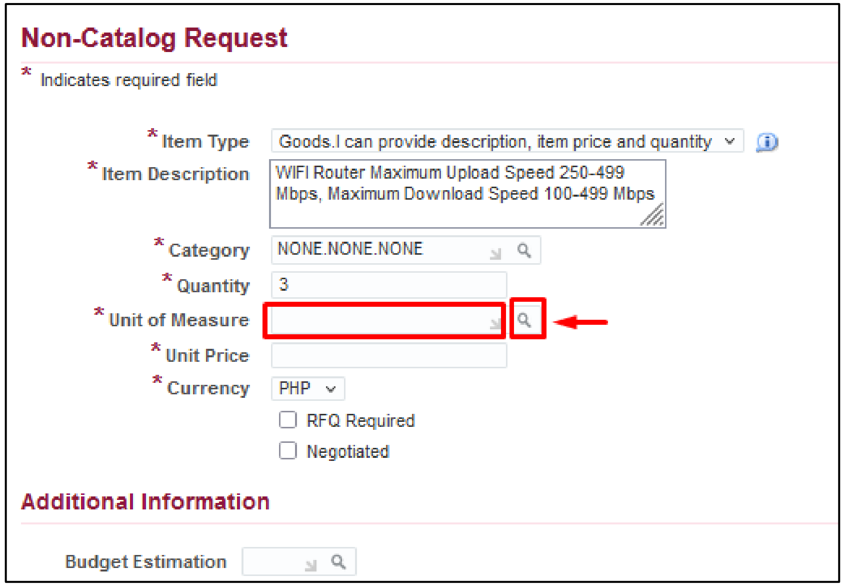
Non-Catalog Request window will appear.

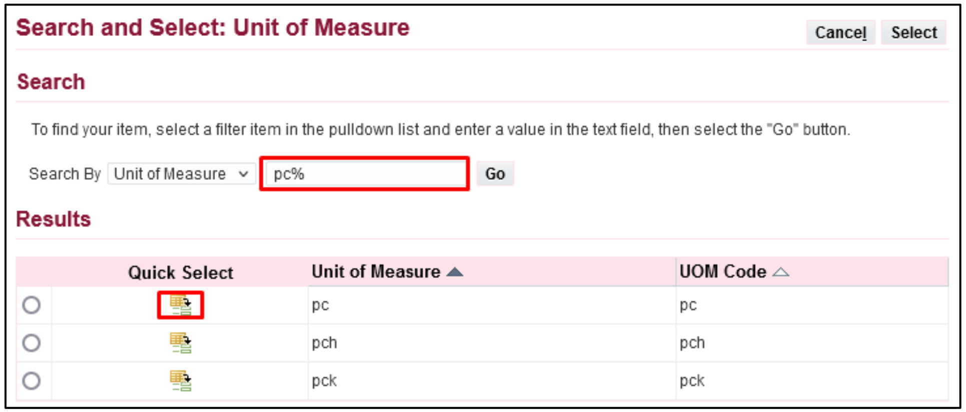


Step 6. Enter ***Item Description.***



Step 7. Enter the ***Quantity*** of the item**.**





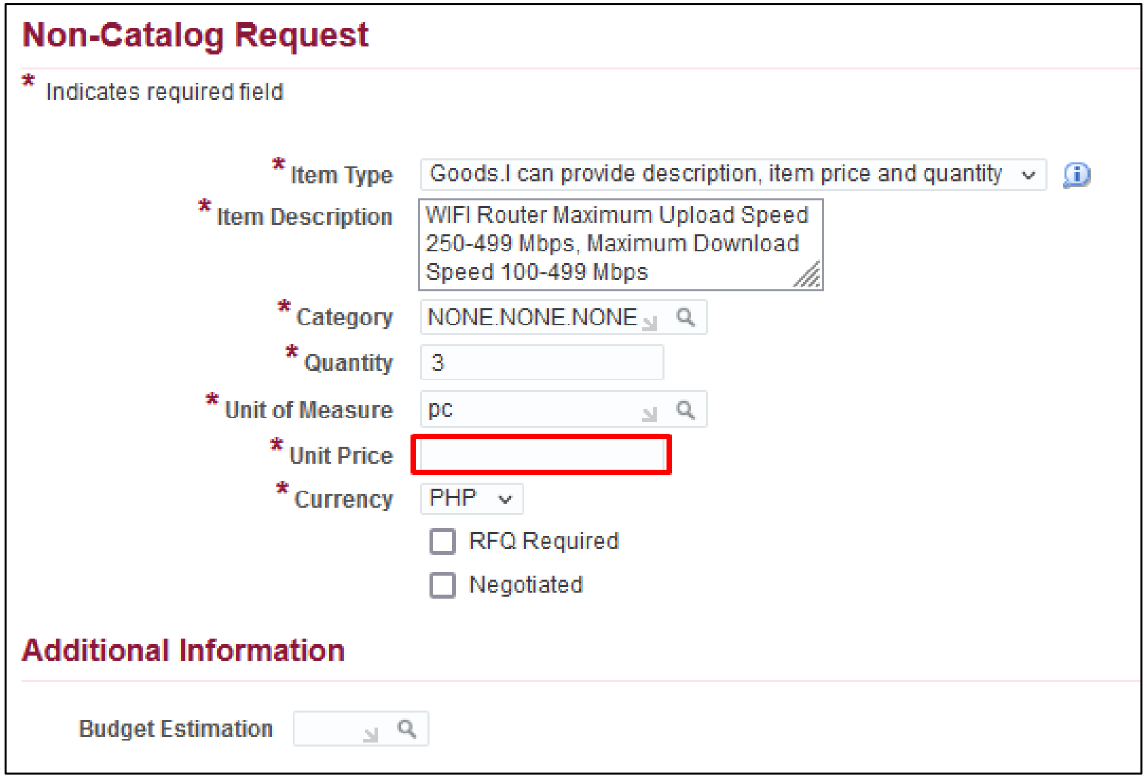
Step 8. For the ***Unit of Measure,*** click ( ) ***Search*** button.

To search ***Unit of Measure***, enter a key word with ***(%)*** to view all possible results.

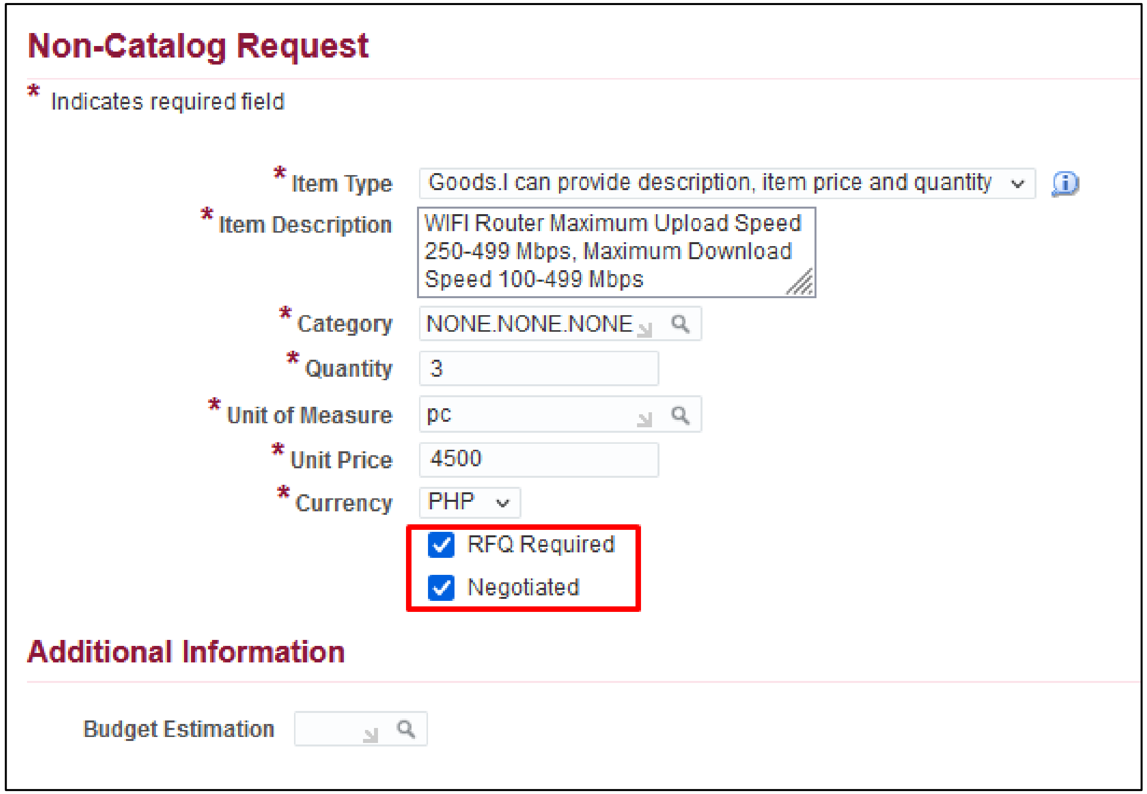
Example: pc%.

Click ***Go***.

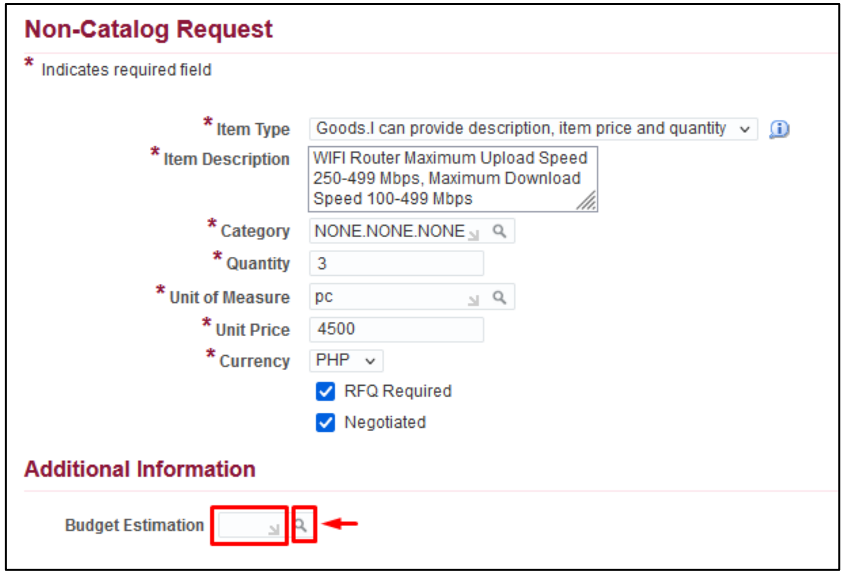
Click the ***Quick Select*** ( )icon beside the unit of measure.



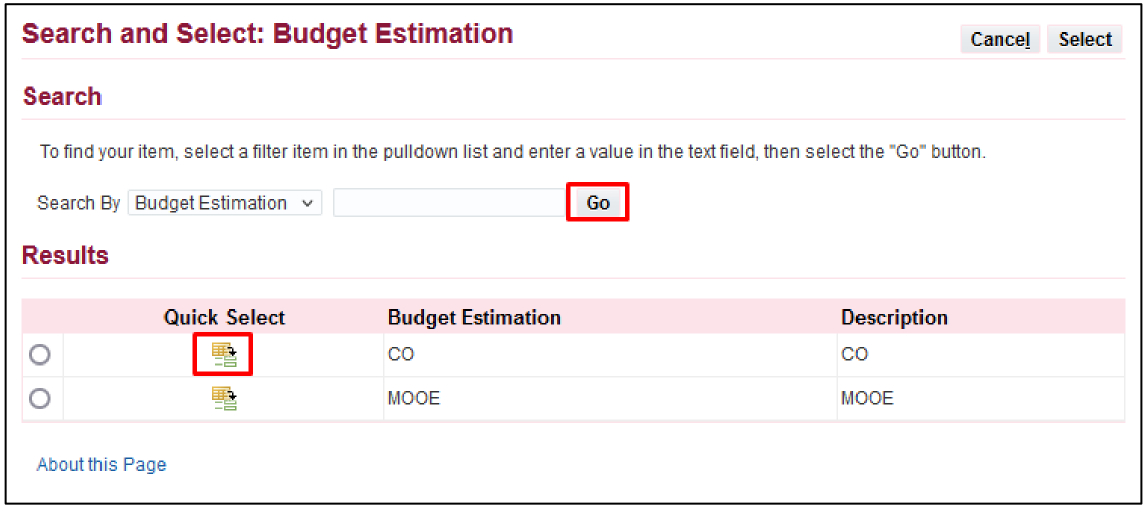
Step 9. Enter ***Unit Price***. The currency is automatically set to ***PHP***.



Step 10. Check ***RFQ Required*** and ***Negotiated*** boxes.

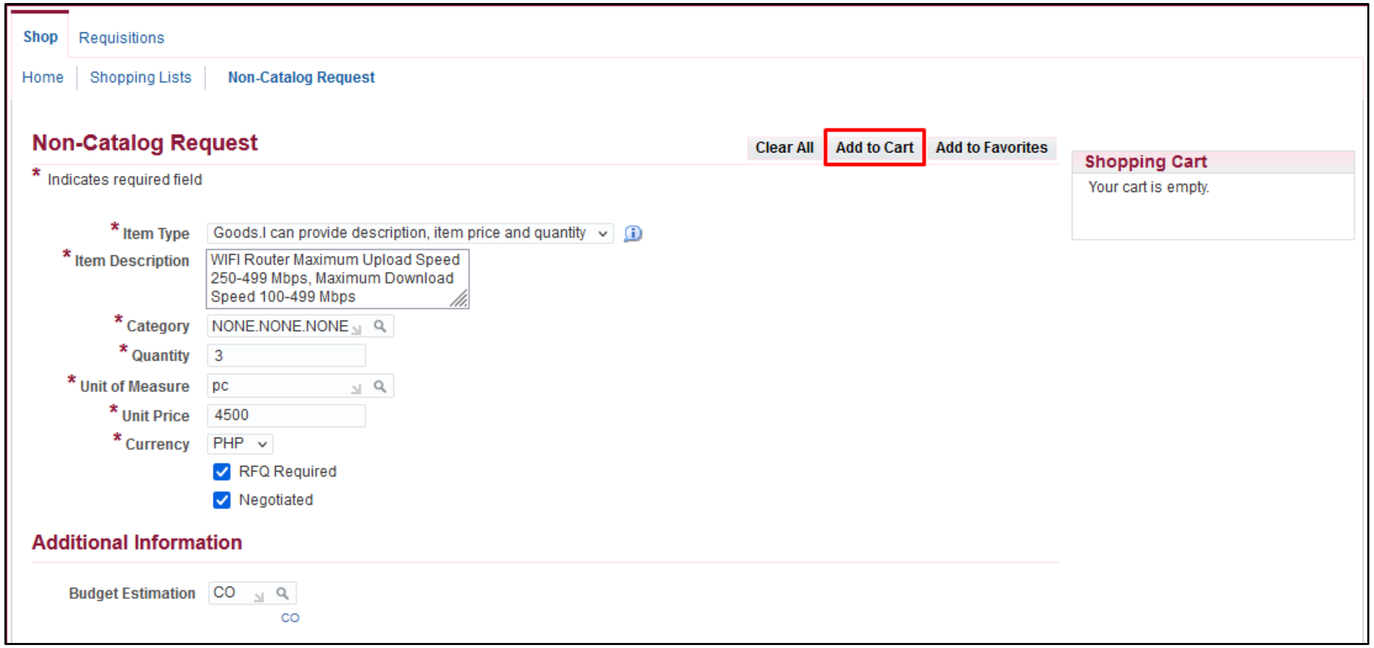


Step 11. For ***Budget Estimation,*** click ( ) ***Search*** button.

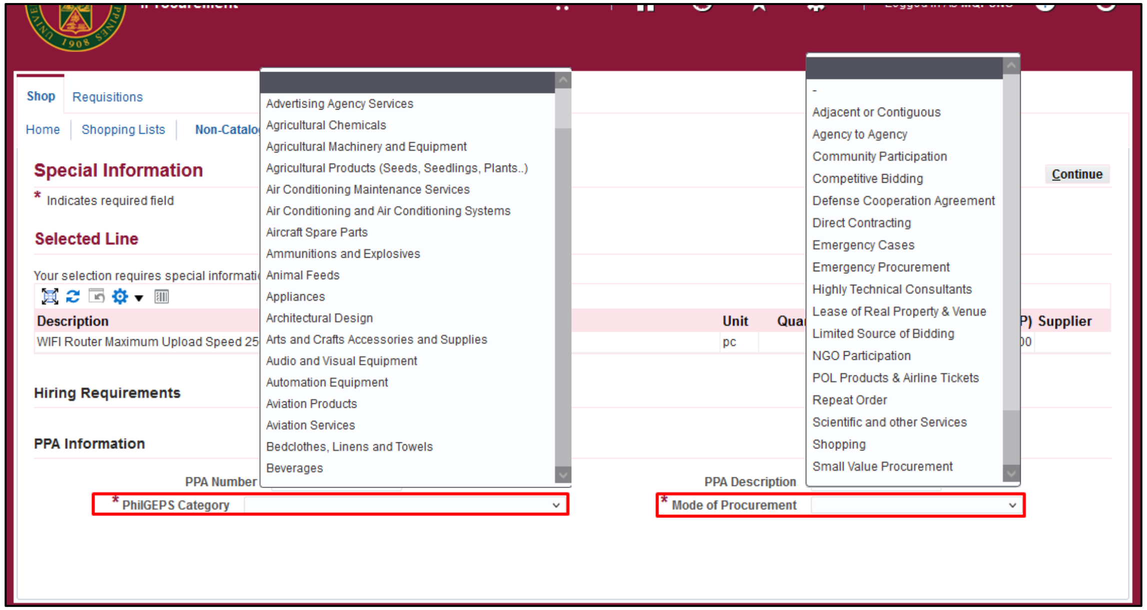


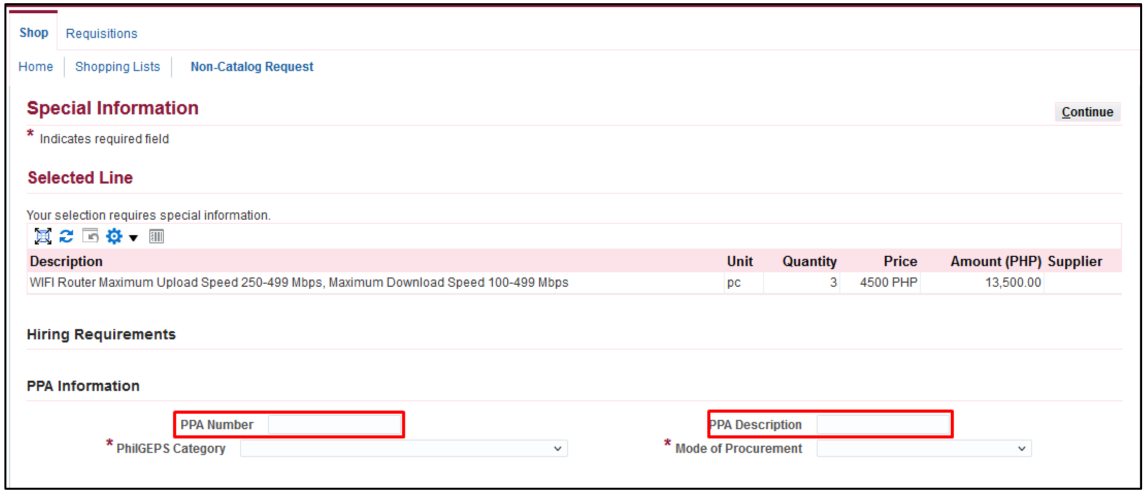
To select ***Budget Estimation***, click go to view all possible results.

Click the ***Quick Select*** ( )icon beside the unit budget estimation.



Step 12. After entering data on the required fields, click ***Add to Cart***.





Step 13. The ***Special Information*** page will appear.

Fill in the special information:

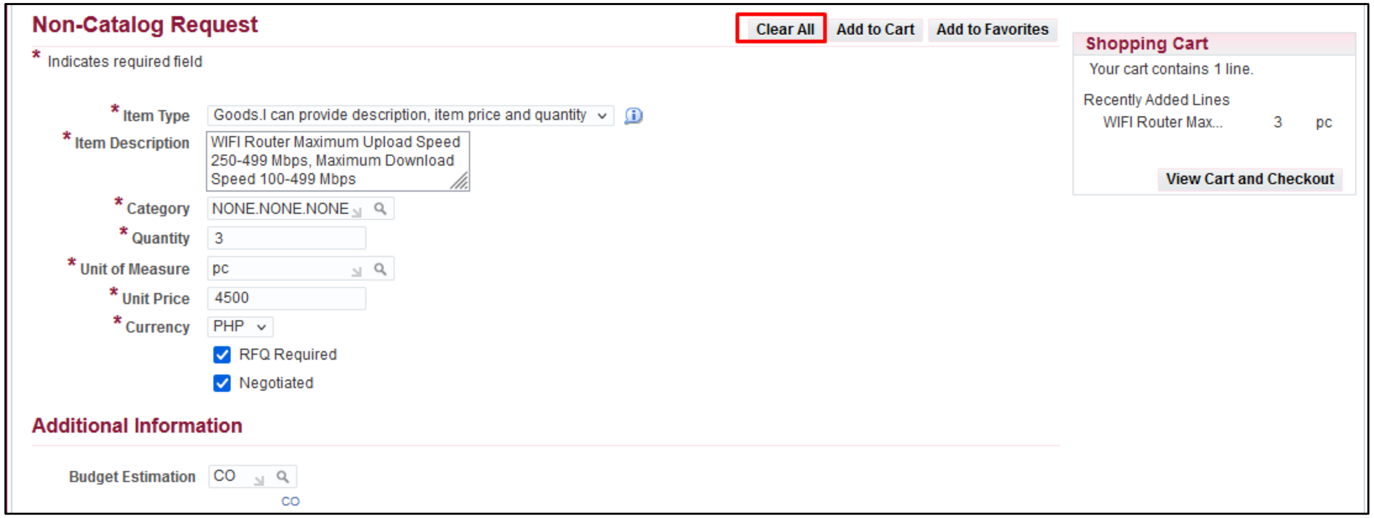
- PhilGEPS Category (required)

- Mode of Procurement (required)

- PPA number
Project Program Activity Number this is a user entered detail; Numbering according to activity, project or program.

- PPA Description
Project Program Activity Description this is a user entered detail; Description/Name of an activity, project or program

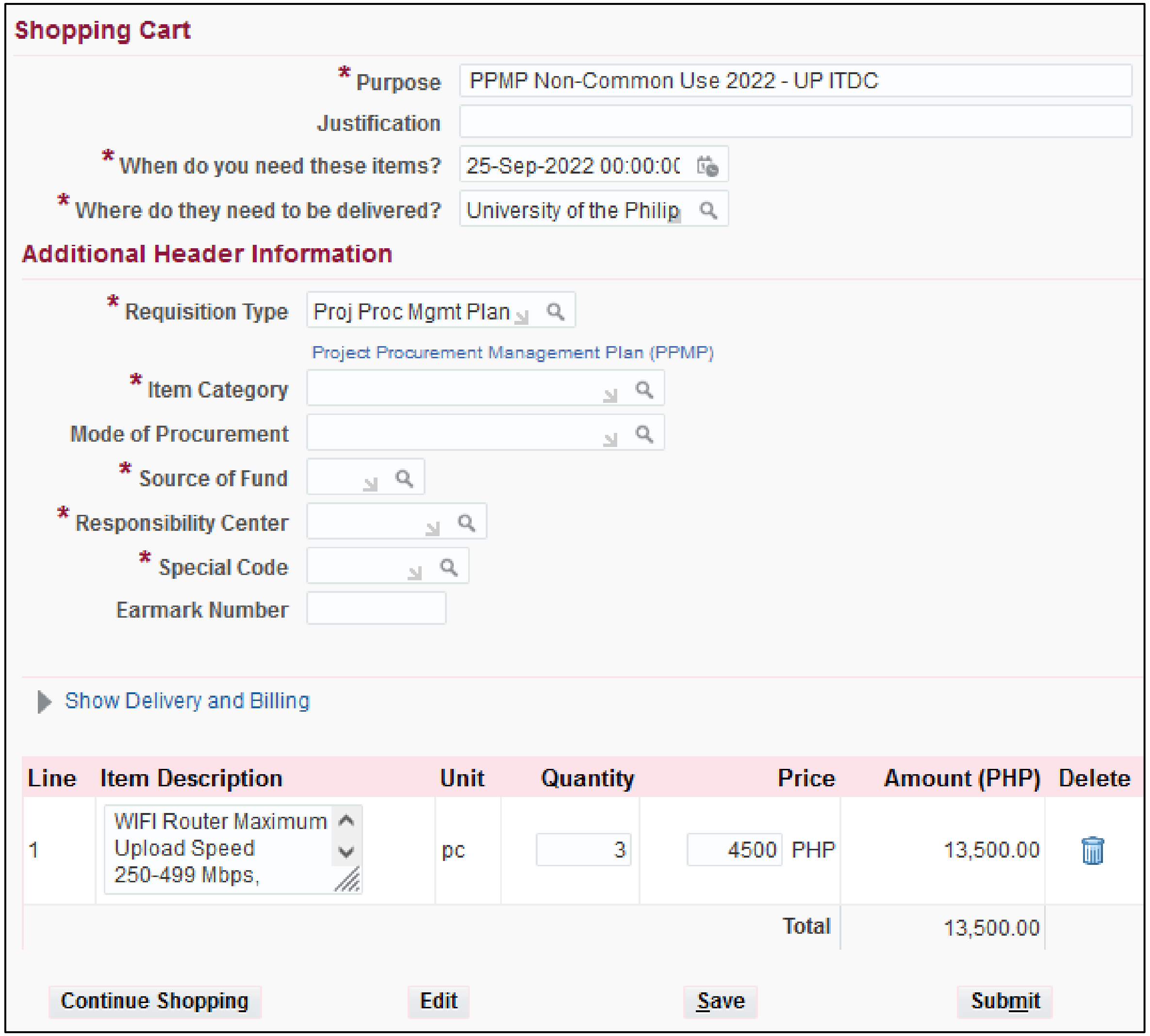
Then, click ***Continue***.



Step 14. To ***add*** item/s in the ***Shopping Cart***, click ***Clear All*** to empty the fields then repeat ***STEP 5*** to ***STEP 11***.

Items will then be reflected on the ***Shopping Cart***.

Step 15. Once done adding items, you may proceed in checking out by clicking ***View Cart and Checkout***.



The ***Shopping Cart*** page, contains the headers of the report and the summary of items in your shopping cart. Here you can:

- ***edit*** the ***quantity*** and ***price*** of the items, place the cursor in the quantity field and type the amount

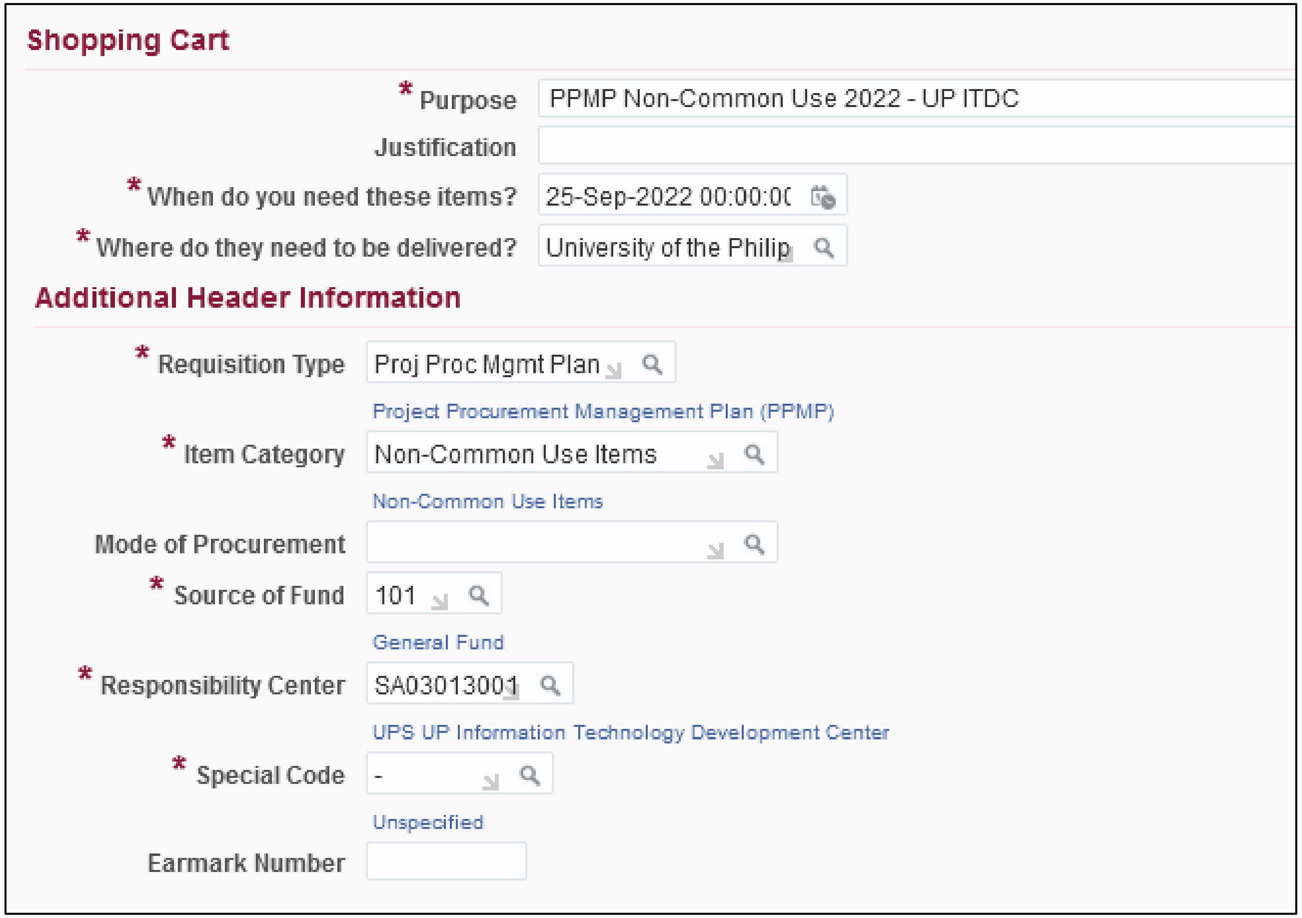
- ***delete*** a line, by clicking on the trash icon ( ) found on the right most column

- ***save*** your cart, by clicking ***save*** button then fill in the ***requisition description*** field using this naming convention:

PPMP Non-Common Use Items (Year) – office – project
(Example: **PPMP Non-Common Use Items 2022 – UP ITDC**)

Then click ***Save.***
- proceed to ***checkout*** by clicking ***Edit*** icon or,

- Click ***Continue Shopping***, to ***return*** to the ***iProcurement homepage*** to add more items



If you have previously saved the requisition, the ***Purpose*** field will be automatically filled

Step 16. Fill in the required details marked by an asterisk (*)

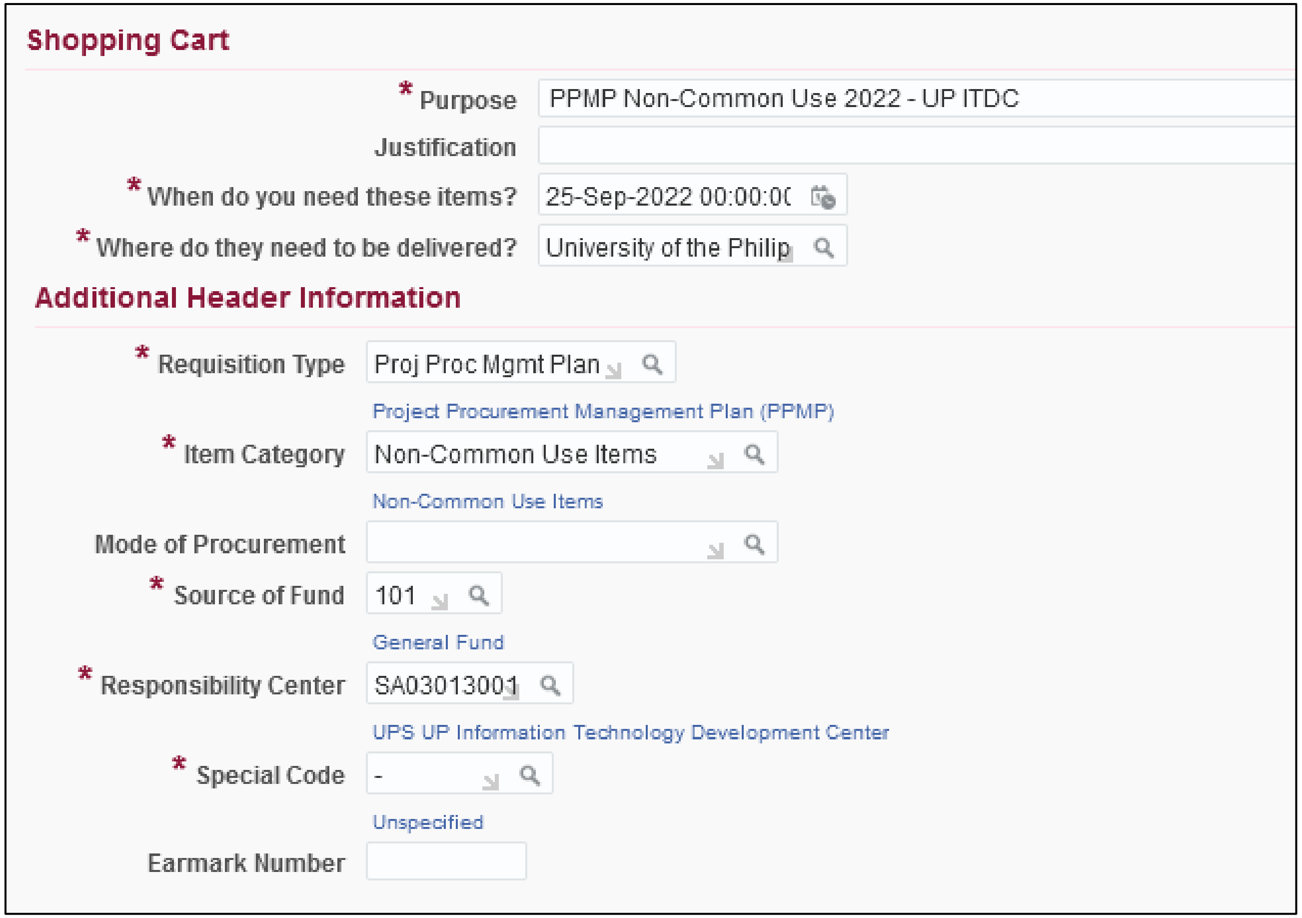
- ***Purpose*** following the naming convention below: ***<u>PPMP Non-Common Use Items (Year) – Office</u>***

Example:
PPMP Non-Common Use Items 2022 – UP ITDC

- ***Requisition Type*** is automatically set to ***Proj Proc Mgmt Plan.***

- ***Item Category*** click ( ) ***Search*** button and select ***Non Common-use Items***

- ***Source of Fund*** click ( ) ***Search*** button and ***select*** fund to be used (example: ***General Fund***)



Responsibility Center click ( ) ***Search***.

Then, ***Search By Description.*** Enter a keyword from your responsibility center with (%) to view all possible results.

Example: ***%UPS%Cash%***
Click ***Go***.

Then, select the ***Responsibility Center.***

- ***Special Code*** click ( ) ***Search***.

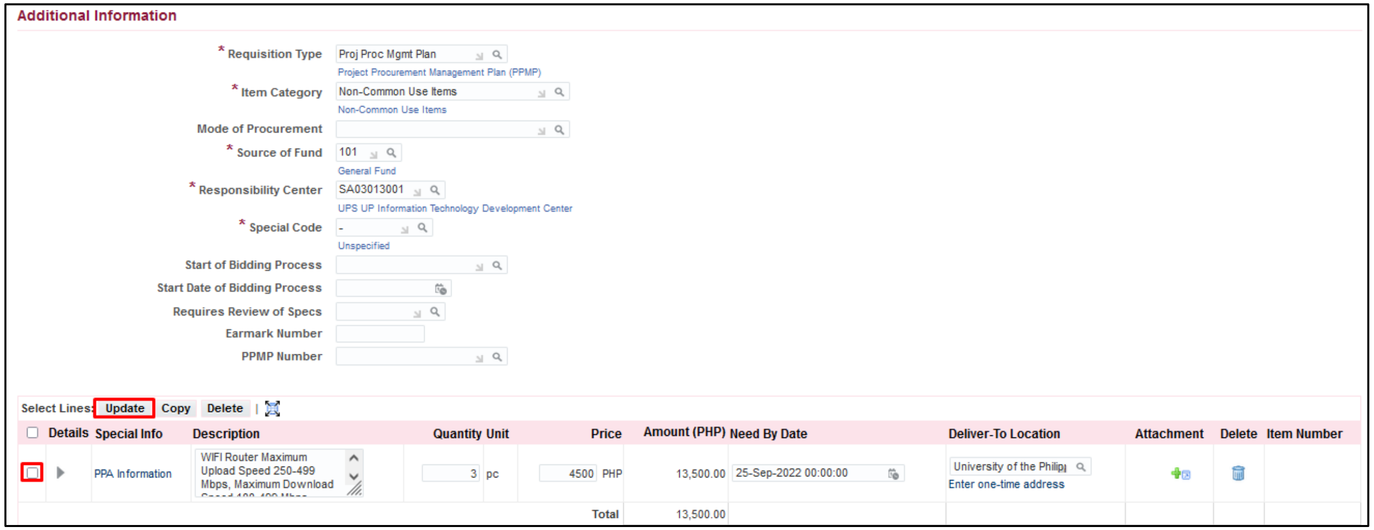
Search By Description.
Enter a key word with ***(%)*** to view all possible results.

Example: ***%Fee%***

Click ***Go.*** Select the special code.

NOTE: For office/s without special code, Click ***Go*** then select ***Unspecified*** or just type ***(-)*** on the field.

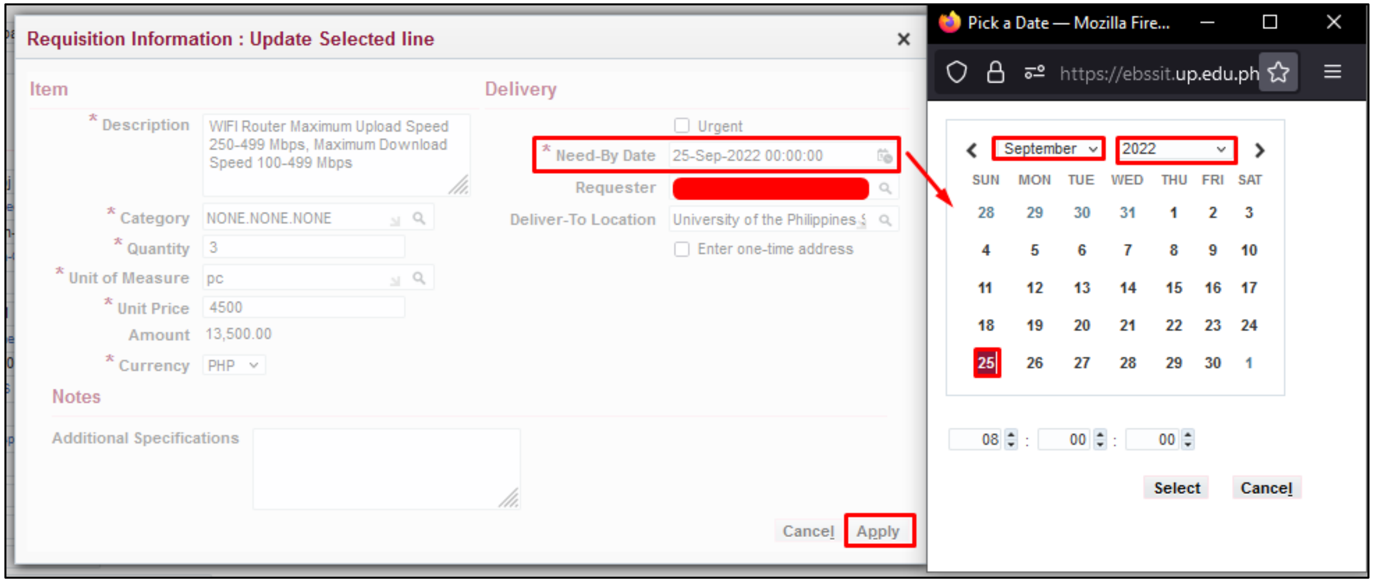
Step 17. Click ***Edit*** to proceed to ***Checkout.***



Step 18. The ***Edit and Submit Requisition*** page will appear. Here you may update the ***need-by-dates*** of the item lines.

To assign the ***need-by date***, select the item/s that will be purchased in the same quarter by ticking the ***check box***.

Then, click ***Update***.

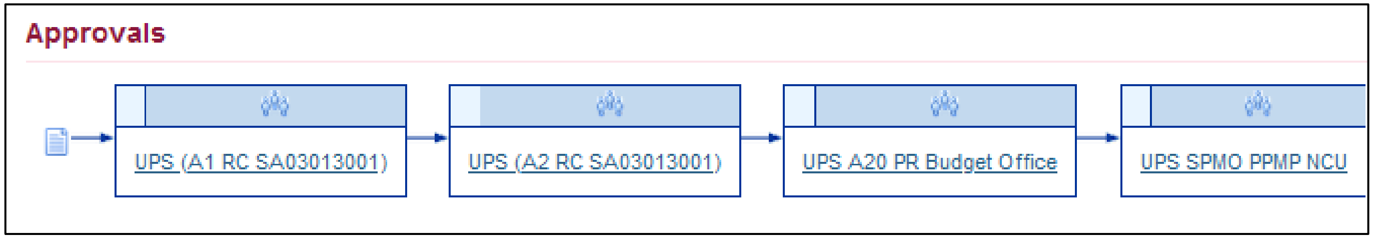


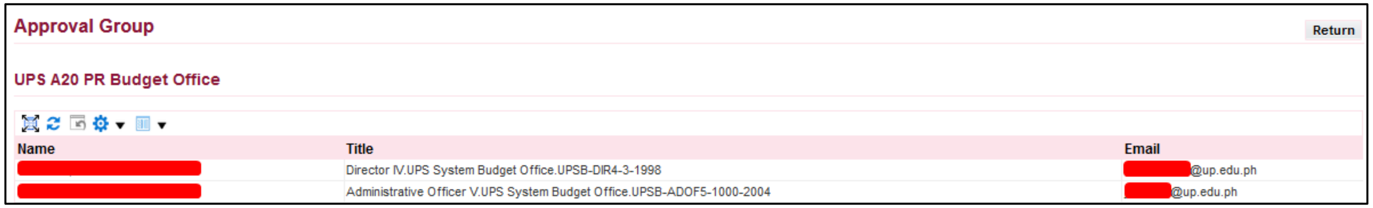
Update ***Need-By-Date*** by selecting the first working day of the month for each quarter.

Then, click ***Apply***.

Perform the same steps in updating the need-by-dates of the remaining items.

Click ***Apply***.




Approval Group

Return

UPS A20 PR Budget Office

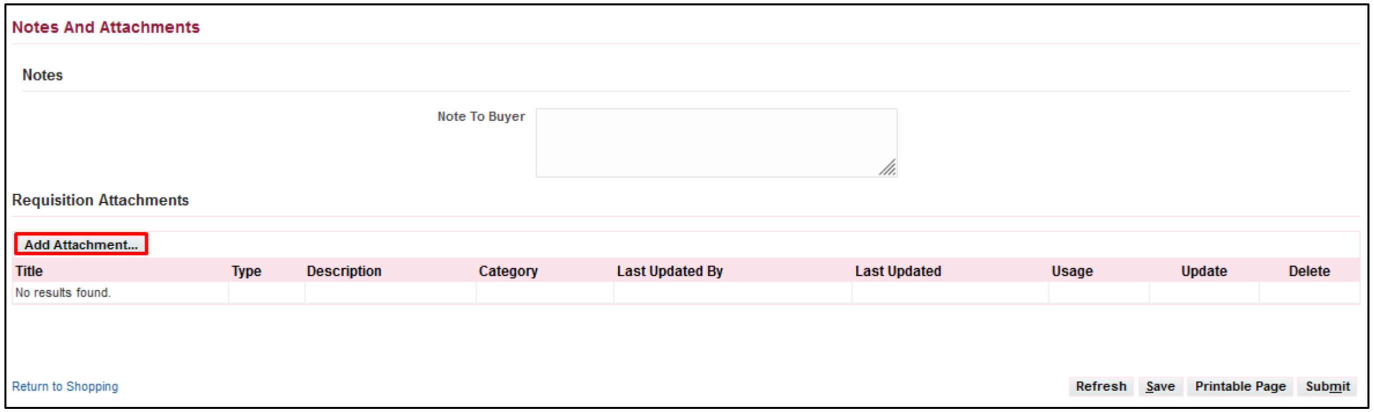
Name	Title	Email
[redacted]	Director IV.UPS System Budget Office.UPSB-DIR4-3-1998	[redacted]@up.edu.ph
[redacted]	Administrative Officer V.UPS System Budget Office.UPSB-ADOF5-1000-2004	[redacted]@up.edu.ph

Step 19. Scroll down the ***Edit and Submit Requisition*** page to review the requisition's Approval path.

To view the Approvers, click on an approval group (blue link).

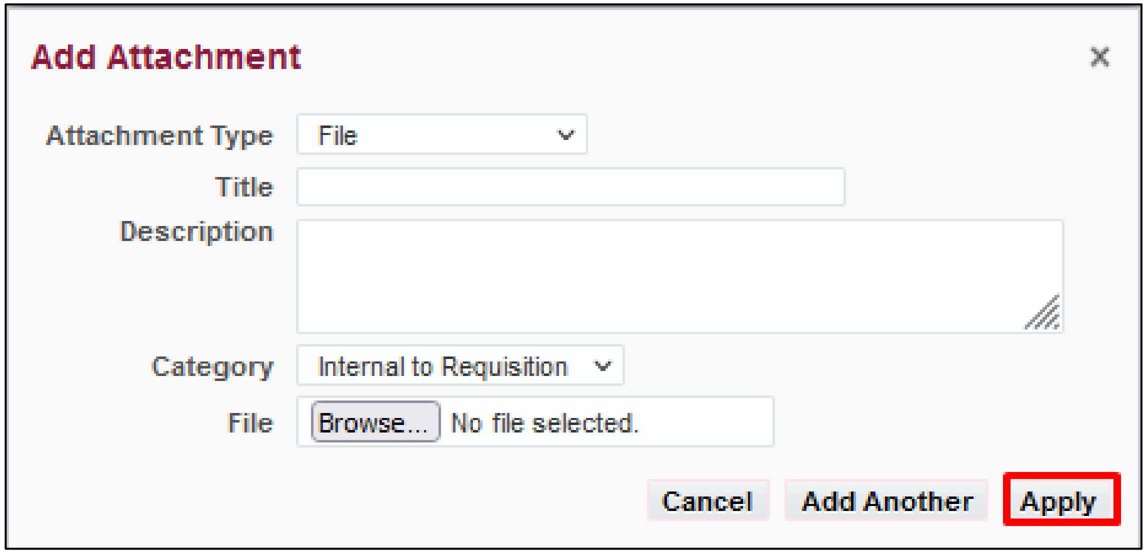
Approval Group window will appear. Check the approver’s details. To return from previous page, click ***Return***

NOTE: Review the approval path. For **incorrect** approval paths, check and verify the details entered in the requisition header. These details are: **Responsibility Code, Special Project Code, Item Category and Requisition Type.**



Step 20. To add attachments, scroll down the ***Edit and Submit Requisition*** page to view the ***Notes and Attachments***

Click ***Add Attachment*** button on the lower left.



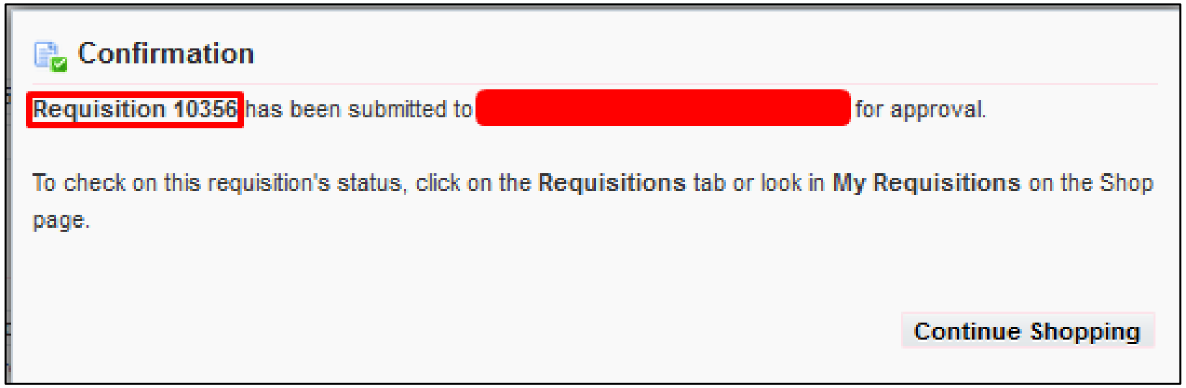
Step 20. Enter a ***Title/Subject*** and ***Description*** to provide more details to your PR.

To attach a file, click on the ***Browse*** button. ***JPG, PNG,*** and ***PDF*** are the only file types accepted. File size must be ***8MB or smaller*** and the ***maximum file size*** for all attachments is ***25MB.***

You can add more attachments by clicking ***Add Another.*** Click ***Apply*** once finished.

The attachment/s will appear in the ***Attachment*** section.

Click ***Submit***.



Expected Result:
A ***Confirmation*** will appear.
Take note of the ***Requisition number***.

Click ***Continue Shopping*** to go back to the ***iProcurement Homepage***

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