



# University of the Philippines

## SPCMIS

**Supplies, Procurement, and Campus Management  
Information System**





# CREATION OF PURCHASE ORDER

# SPCMIS User Manual

## *iProcurement*

Author: Julius Ermitanio, Reah Mae Supnet &  
Carlo Martin Evangelista  
Creation Date: 07 February 2017  
Last Updated: 16 August 2019  
Document Ref:  
Version: 3.0

### Approvals:

Recommending Approval:

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Approved by:

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## 1. DOCUMENT CONTROL

### 1.1 Change Record

Date	Author	Version	Change Reference:
07 February 2017	Reah Mae Supnet, Carlo Evangelista & Emmanuel Lim	1.0	Initial Issue
01 March 2017	Reah Mae Supnet	2.0	Updated
16 August 2019	Reah Mae Supnet	3.0	Major Update

## 2. Description

<b>Script ID</b>	UGSP070211
<b>Script Name</b>	Create PO (Web version)
<b>Information System</b>	Supplies, Property and Campus Management Information System
<b>Functional Domain</b>	Purchasing
<b>Purpose</b>	To create Purchase Order
<b>Data Requirement</b>	Approved PR lines
<b>Dependencies</b>	Originator should be a Buyer  Responsibility: Purchasing Unit Buyer, <CU> Purchasing SPMO Buyer, <CU>
<b>Scenario</b>	The originator needs to create a PO from an Approved PR and RFQ
<b>Author</b>	Reah Mae Supnet, Carlo Evangelista & Emmanuel Lim



User Name

Password

Login

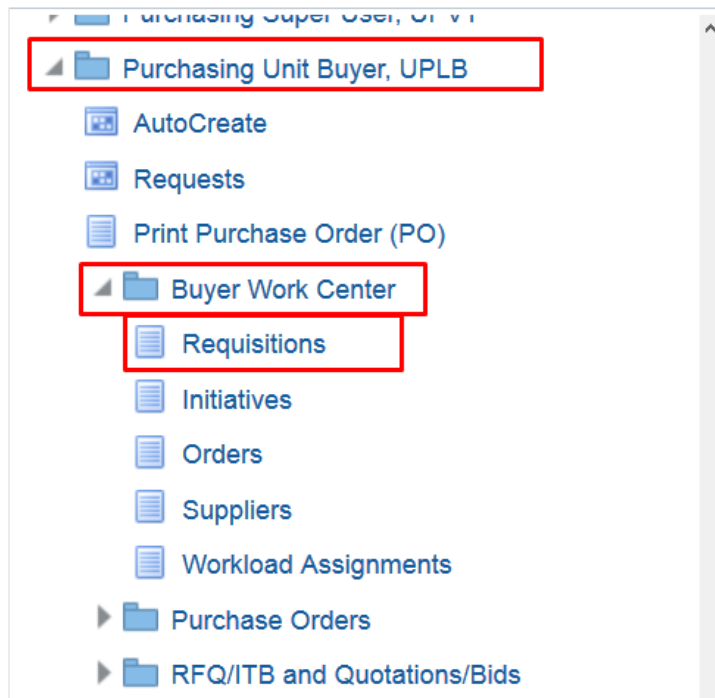
Cancel

**Step 1.** Go to [uis.up.edu.ph](http://uis.up.edu.ph)

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

**Note:** to create a **Purchase Order (PO)** the user should be a **Buyer** first.

To become a **Buyer** kindly contact your **SPMO/Procurement Office** to add you as a buyer.



**STEP 3.** In the **Main Menu**, select **Purchasing Unit Buyer, <CU>** or **Purchasing SPMO Buyer, <CU>**

Then select the **Buyer Work Center** folder

Then select **Requisitions**

**Requisitions** Initiatives Orders Suppliers Awards IDVs Initiatives

**Demand Workbench** Summary Amendments

### Demand Workbench

\* Indicates required field

### Saved Searches

Saved Search

<input type="checkbox"/> OU	Requisition	Item/Job	Qty	Unit	Price	Curr	Need-By	Assignment	Source	Options	Actions
No results found.											

**Document Builder**

Type

\* OU

Number of Lines 0

**Search**

**STEP 4.** Search your approved PR by clicking the **Search** button



**STEP 5. *Clear* the *Buyer* field**

Then enter the ***PR no.*** in the ***Requisition*** field

Then click ***Go***

**Requisitions** | Initiatives | Orders | Suppliers | Awards | IDVs | Initiatives

**Demand Workbench** | Summary | Amendments

Requisitions: Demand Workbench >

**Demand Workbench** Save Search

\* Indicates required field

**Search** Saved Searches

Match ☒ All ☐ Any

Buyer is  CLEAR

Requisition is

Category is

Supplier is

3 Go Clear Add Another  Add

OU	Requisition	Item/Job	Qty	Unit	Price	Curr	Need-By	Assignment	Source	On RFQ	Options	Actions
No results												

Requisitions Initiatives Orders Suppliers Awards IDVs Initiatives

Demand Workbench Summary Amendments

### Demand Workbench

\* Indicates required field

**Search**

Match ☒ All ☐ Any

Buyer is




Requisition is  30071

Category is

Supplier is

Add Another  Buyer

Select Requests:

<input checked="" type="checkbox"/>	OU	Requisition	Item/Job	Qty	Unit	Price	Curr	Need-By	Source	On RFQ	Actions
<input checked="" type="checkbox"/>	ULB	30071, 1	VR-0002	1	trip	4000	PHP	26-Feb-2018 09:22:22	UP Warehouse, UP WAREHOUSE 43,529		  

Save Search

## Document Builder

Type New Order

\* OU UP Los Banos

Number of Lines 0

**STEP 6.** To select the items to be included in the PO tick the box of the line item.

If you want to select all the item lines ***Tick*** the tick box in the header

**STEP 7.** Click ***Add*** button to add the item lines in your ***Document Builder***

Requisitions | Initiatives | Orders | Suppliers | Awards | IDVs | Initiatives

Demand Workbench | Summary | Amendments

### Demand Workbench

\* Indicates required field

#### Search

Match ☒ All ☐ Any

Buyer is

Requisition is  30071

Category is

Supplier is

Buyer

OU	Requisition Item/Job	Qty	Unit	Price	Curr	Need-By	Assignment	Source	On RFQ	Options	Actions
No results found.											

#### Document Builder

Type New Order  
OU UP Los Banos

Agreement

Supplier UP Warehouse

Site UP WAREHO

Currency PHP

\* Style Standard Pur

☒ Group Shipments

#### Recently Added Items

Vehicle Rental: UPLB to Quezon City, Caloocan and Manila	1	trip
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Number of Lines 1  
Total 4,000.00 PHP

**STEP 8.** Added items will be reflected in the **Document Builder** found on the right side of the page

In the **Document Builder**:

Fill in the **Supplier** field. To search for the **Supplier** click the search icon. Use the (%) for easier searching.

**Style** field should be **Standard Purchase Order**

After Click **Create**

### STEP 9. Update Standard Purchase Order page will appear.

#### Header Tab:

Fill in the *Description* field

Suggested naming convention:

**PO for PR no. – Item Category – Non Common Use Items (Quarter-Year) – Office – Fundcode**

(Example: **PO for PR 30071 Office Equipment Common Use Items (Q4 – 2019) – Cash Office - 9318911**)

#### Terms section:

Fill in **Payment Terms**

Click the **Search** icon then select the payment term (Example: **Immediate**)

Fill in the **Delivery Terms**

Click the **Search** icon then select the Delivery term (Example: **30 Calendar Days**)

**Update Standard Purchase Order 25820** Cancel Actions Delete Go Save Approval Options Submit

\* Indicates required field

► Search

**Header** Lines Schedules Distributions

Operating Unit	UP Los Banos	Creation Date	16-Aug-2019 14:12:24
Status	Incomplete	Total	4,000.00 PHP
Supplier	UP Warehouse	* Buyer	Supnet, Ms. Reah Mae Matubis
Supplier Site	UP WAREHOUSE	Description	PO for PR 30071
Supplier Contact			
Communication Method	<input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> E-Mail		

**Terms**

Bill-To Location	University of the Philippines Los E	* Default Ship-To Location	University of the Philippines Los E
Payment Terms	Immediate	Delivery Terms	30 Calendar Days

## Details

Purchase Request No.	30071	1
* Obr/BUR Number	123-4526	2
* Mode of Procurement	Small Value Procurement	3
	NP-53.9 Small Value Procurement	
* Source of Fund (1)	101	4
	General Fund	
* Responsibility Center	LB03020001	
	UPLB Information Technology Center	
* Special Code	-	
	Unspecified	
Pre-Bid Conference		
Eligibility Check		
Opening of Bids		
Bid Evaluation		
Post Qualification		
Notice of Award		
Notice to Proceed		
Contract Signing		
Item Category		

### Details section:

Fill in the required fields indicated by an **asterisk (\*)**

**1. Requisition No:** field type the **PR. No** (Example: 30071)

**2. Obr/Bur no:** Enter the **Obr/Bur no.** or (-) for unspecified

**3. Mode of Procurement:** Enter the correct **Mode of Procurement**

To search click the **Search** icon (🔍),

click **Go** then select the **MoP**



















(Example: **Public Bidding** or **Shopping**)

**4. Source of fund:** Enter the correct **Source of Fund**


To search click the **Search** icon (🔍), click **Go** then select the **SoF**

(Example: **101-General Fund**)

## Details


Purchase Request No.	30071
* Obr/BUR Number	123-4526
* Mode of Procurement	Small Value Procurement  
	NP-53.9 Small Value Procurement
* Source of Fund (1)	101  
	General Fund
* Responsibility Center	LB03020001   5
	UPLB Information Technology Center
* Special Code	-   6
	Unspecified
Pre-Bid Conference	
Eligibility Check	
Opening of Bids	
Bid Evaluation	
Post Qualification	
Notice of Award	
Notice to Proceed	
Contract Signing	
Item Category	 

**5. Responsibility Center:** Enter the correct **Responsibility Center**

To search click the **Search** icon () ,  
click **Go** then select the **RC Code**

(Example: **LB3020001-UPLB Information Technology Center**)

**6. Special Code:** Enter the correct **Special Code**

To search click the **Search** icon () ,  
click **Go** then select the **SP Code**

(Example: **UPLB 8215900 - Funding Requirements for the Interactive Multimedia**)

**Without SP Code:** type (-) for **unspecified**

**7. Additional Information**

Requisitions: Demand Workbench &gt;

**Update Standard Purchase Order 25820**

Cancel Actions Delete Go Save Approval Options Submit

\* Indicates required field

## Search

Header **Lines** Schedules Distributions

Operating Unit UP Los Banos

Status Incomplete

Total 4,000.00 PHP

Add Lines: From Catalog										Go	Update with Excel			
* Line	* Type	Item/Job	* Description	* Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions				
1	Goods	VR-0002	Vehicle Renta	SERVICES.OTH GEN SERV.VEHICLE RENTAL	1	trip	4000	4,000.00	26-Feb-2018					

## Attachments

Add Attachment...					
Title	Type	Description	Category	Update	Delete
No results found.					

## Notes

Additional Specifications

Cancel Actions Add Another Line Go Previous Line Next Line **Apply**

**STEP 10.** To review and make necessary changes to the item lines go to the **Lines** Tab  
Here you may edit the items':

- **Description**
- **Quantity**
- **Price**

based from the approved **Abstract of Quotation** or Result of Bidding process

To review the items per line click on the **Update icon** (✎)

Check if the item has a **long description or additional specifications** found in the **Notes** section

The field allows **480 characters**. You may add or edit the details. Use a **semi-colon (;)** to indicate **next line/Enter**

Click **Apply** to apply the updates done. Then click **Save**.

**Attachments**

**Add Attachment...**

Title	Type	Description	Category	Update	Delete
No results found.					

**Notes**

Note to Supplier

Note to Receiver

Cancel Actions Delete Go Save Approval Options Submit

**STEP 11.** To add attachments,

Go back to the **Header tab** then scroll down to see the **Attachments** section

To add attachments click **Add Attachment** button

Enter a **Title/Subject** and **Description** to provide more details.

Click **Browse** and choose the file to be attached.

**Attachments**

**Add Attachment...**

**Add Attachment**

Attachment Type: File

Title:

Description:

Category: Documents

File:  No file selected.

Cancel Add Another Apply

Category Update Delete

Note to Receiver

Cancel Actions Delete Go Save Approval Options Submit

**Note:** **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**

To add more attachments click **Add Another**. Then repeat the steps in adding description and the files.

Click **Apply** after adding the attachments



Orders >

**Update Standard Purchase Order 25820**

\* Indicates required field

Cancel Actions Delete Go Save Approval Options **Submit**

► Search

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**Header** Lines Schedules Distributions

Operating Unit	UP Los Banos	Creation Date	16-Aug-2019 14:12:24
Status	Incomplete	Total	4,000.00 PHP
Supplier	UP Warehouse	* Buyer	Supnet, Ms. Reah Mae Matubis
Supplier Site	UP WAREHOUSE	Description	PO for PR30071
Supplier Contact			
Communication Method	<input type="checkbox"/> Print		
	<input type="checkbox"/> Fax		
	<input type="checkbox"/> E-Mail		

**STEP 12. Click *Submit***

**Confirmation** page will appear.  
Take note of the **PO number**

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