



# University of the Philippines

## Financial Management Information System

### User Guide

#### Description:

Process ID	
Process Name	Generation of Report – UP Registry of Customers for College of Law
Information System	Financial Management Information System
Functional Domain	Accounts Receivables Module
Responsibility	Receivables Cash, UPD CoLaw
Purpose	Generated output will be a reference to see the list of customers of the unit
Data Requirement	Name and details of the customers
Dependencies	None
Scenario	User wants to generate a report to see the list of customers of their unit.

#### Revision History:

Date	Author	Version	Change Reference:
11 July 2017	Christopher Jay F. Garbo	1.0	Initial Issue
13 July 2017	Reah Mae Supnet	1.2	Revision

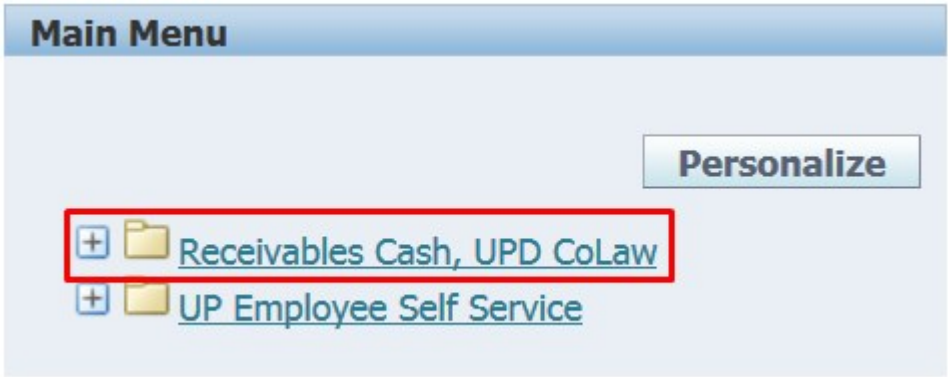
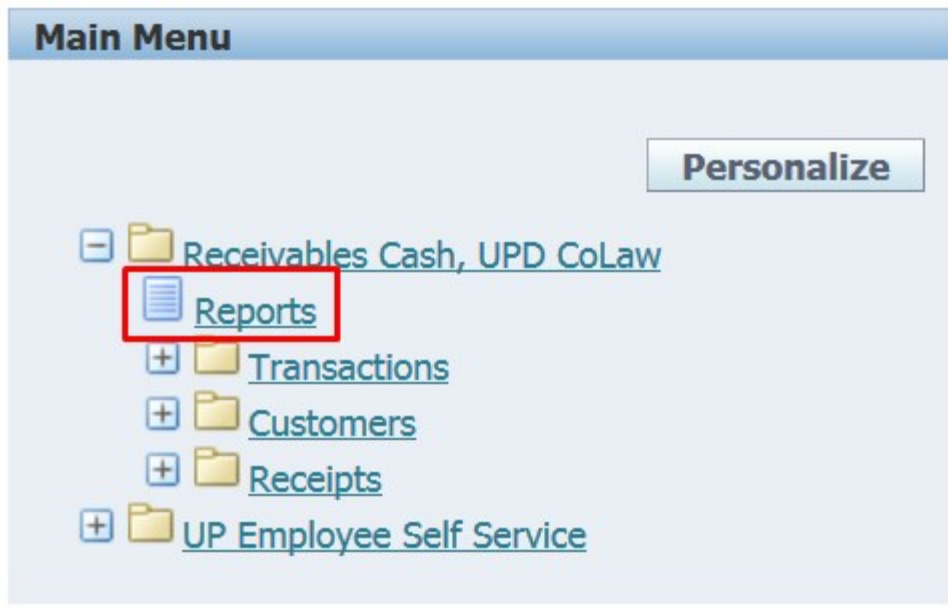
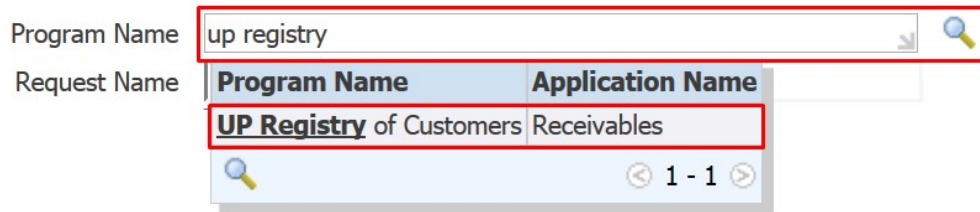
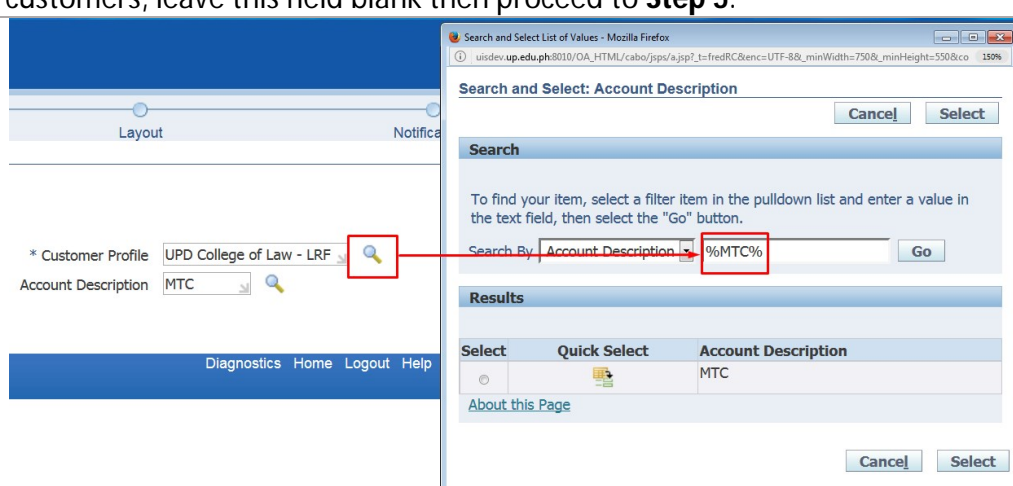
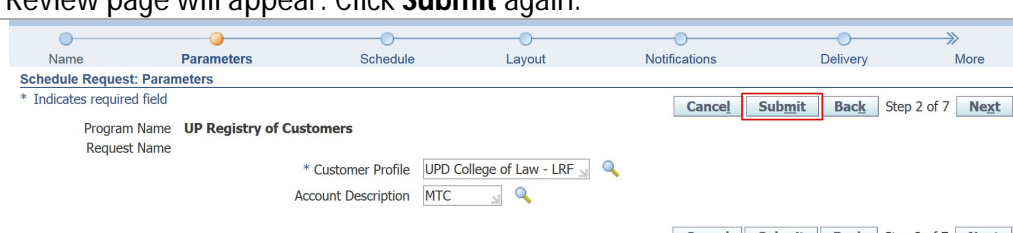
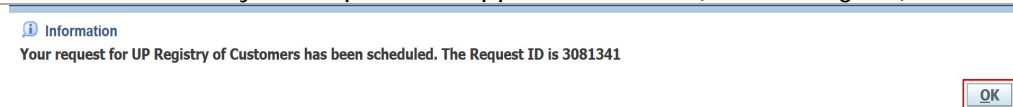
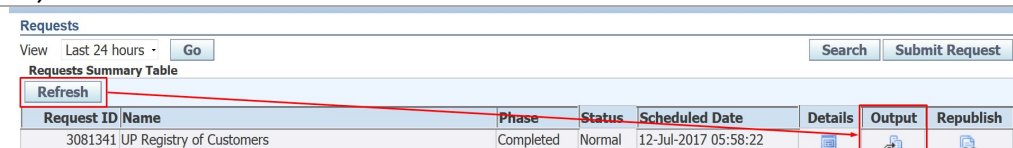
Process Steps	Process Details
1	From <b>UIS HOME</b> , proceed to <b>Main Menu</b> and click <b>Receivables Cash, UPD CoLaw</b> (Refer to Fig .01)
Fig. 01	 <p>The screenshot shows the 'Main Menu' interface. At the top is a blue header bar with the text 'Main Menu'. Below the header, there is a 'Personalize' button on the right. In the center, there are two menu items, each preceded by a folder icon and a plus sign in a blue box. The first item is 'Receivables Cash, UPD CoLaw' and the second is 'UP Employee Self Service'. The first item is highlighted with a red rectangular box.</p>
2	Click <b>Reports</b> (Refer to Fig. 02)
Fig. 02	 <p>The screenshot shows the 'Main Menu' interface. At the top is a blue header bar with the text 'Main Menu'. Below the header, there is a 'Personalize' button on the right. In the center, there are several menu items. The first item is 'Receivables Cash, UPD CoLaw' with a minus sign in a blue box to its left. Below it is the 'Reports' item, which has a document icon in a blue box to its left and is highlighted with a red rectangular box. Below 'Reports' are three more items: 'Transactions', 'Customers', and 'Receipts', each preceded by a plus sign in a blue box. At the bottom is the 'UP Employee Self Service' item, preceded by a plus sign in a blue box.</p>
3	<p>The request page will appear. In the <b>Program Name</b>, type the name of the report to be generated. (Refer to Fig. 03) You may also search for the name of the report by clicking the magnifying glass icon. A search window will appear, then type any word from the name of the report to be generated. Use %sign for the search results be filtered. (e.g. %customers%) Select the <b>UP Registry of Customers</b>. Then click <b>Next</b>.</p>

Fig. 03	
4	<p>In the Parameters, type in the <b>Account Description</b> field the description (e.g. abbreviation) of the customer entered or you may search for the name by clicking the magnifying glass icon. (Refer to Fig. 04) A search window will appear, then type any word from the description of the customer. Use '%' sign for the search results be filtered. Then click <b>Go</b>. To view the list of all customers, leave this field blank then proceed to <b>Step 5</b>.</p>
Fig. 04	
5	<p>After selecting the account description, click <b>Submit</b>. (Refer to Fig. 05) The Review page will appear. Click <b>Submit</b> again.</p>
6	
Fig. 06	<p>A confirmation of your request will appear. Click <b>OK</b>. (Refer to Fig. 06)</p> 
7	<p>Requests page will appear where a summary table of report requests may be seen. Click the <b>Refresh</b> button until the output icon appeared. (Refer to Fig. 07)</p>
Fig. 07	

8

Click the output icon to view the output of the report. (Refer to Fig. 08)  
Output will be automatically downloaded from the system.

Fig. 08

Requests

View Last 24 hours Go


Search Submit Request

Requests Summary Table

Refresh

Request ID	Name	Phase	Status	Scheduled Date	Details	Output	Republish
3081341	UP Registry of Customers	Completed	Normal	12-Jul-2017 05:58:22			

Expected Result:



**UNIVERSITY OF THE PHILIPPINES**  
**DILIMAN**  
Diliman, Quezon City, Metro Manila, NCR  
VAT Reg. TIN: 000-000-864-00006

**UP Registry of Customers**  
UPD College of Law - LRF

Account Number	Name	Type	Description	Contact
1569	Municipal Trial Court of Virac	ORGANIZATION	MTC	Miss Ma. Elviza Yuga
1588	Quezon City Regional Trial Court	ORGANIZATION	MTC	Mr. Jose Dela Cruz