# University of the Philippines

# SPCMIS

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

# Creation of RFQ

# SPCMIS User Manual
## *iProcurement*

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Document Ref:         SPCMIS User Manual – Create RFQ

Version:               4.0

**Approvals:**

Recommending Approval:

_____

Approved by:

_____

# 1. DOCUMENT CONTROL

## 1.1 Change Record

| Date | Author | Version | 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 |
| 17 May 2019 | Reah Mae Supnet | 4.0 | Major Revision |

## 2. Description

| | |
|---|---|
| **Script ID** | UGSP090141 |
| **Script Name** | Create RFQ |
| **Information System** | Supplies, Procurement, and Campus Management Information System |
| **Functional Domain** | Purchasing Buyer |
| **Purpose** | To create a Request for Quotation |
| **Data Requirement** | Approved PR lines |
| **Dependencies** | Originator should be a Buyer<br><br>Responsibility:<br>Purchasing Unit Buyer, <CU><br>Purchasing SPMO Buyer, <CU> |
| **Scenario** | After creating a PR and having it approved the originator will create an RFQ that will be given to Suppliers |
| **Author** | Reah Mae Supnet & Carlo Martin Evangelista |

**User Name**

**Password**

Login    Cancel

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

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

**Navigator**

Personalize

▶ 📁 iProcurement PPMP Requester, UPS

▶ 📁 iProcurement PR Requester, UPS

▶ 📁 Payables DV, UPS

◢ 📁 Purchasing Buyer, UPS

　　🖼 AutoCreate

　　🖼 Requests

　　📄 Print Purchase Order (PO)

　　▶ 📁 Buyer Work Center

　　▶ 📁 Purchase Orders

　　▶ 📁 RFQ/ITB and Quotations/Bids
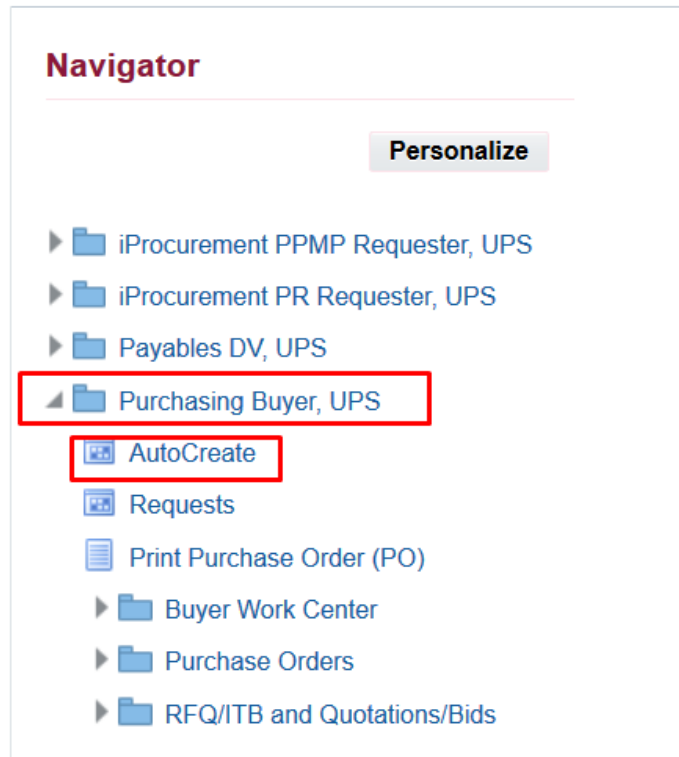
**Step 3.** In the *Main Menu*, select *Purchasing Buyer, UP*

**Step 4.** Select *Autocreate*

**Step 5.** Java Application form will prompt, tick checkbox then click *Run*

**Step 6.** *Find Requisition Lines* window will appear

**Step 7.** Clear the *Buyer* field

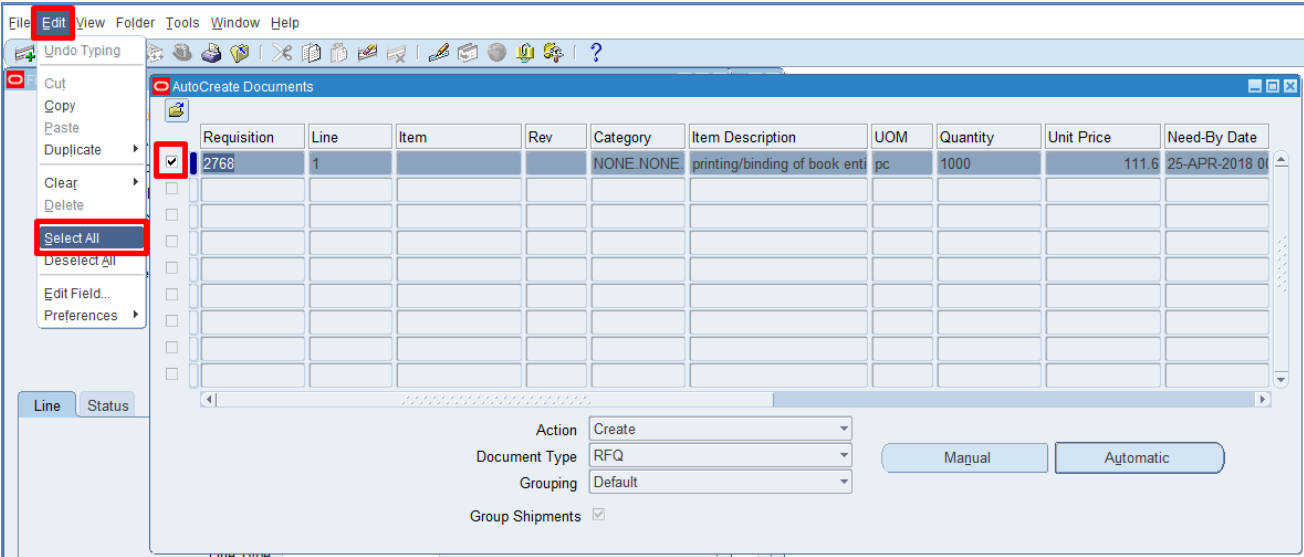In *Requisition* field, click *ellipsis* to search for the Purchase Request to be referenced
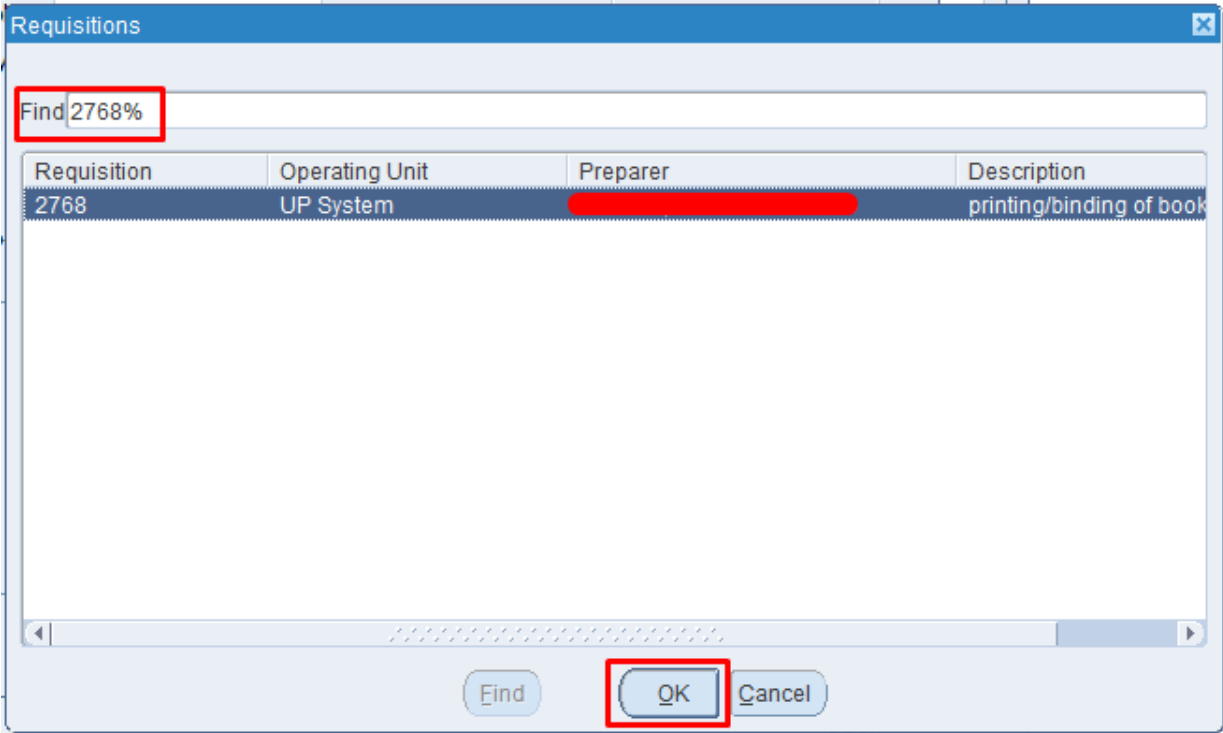
**Step 8.** Type the requisition number on *Find* field.

Click *Find*

**Step 9.** Select a requisition then click *Ok*
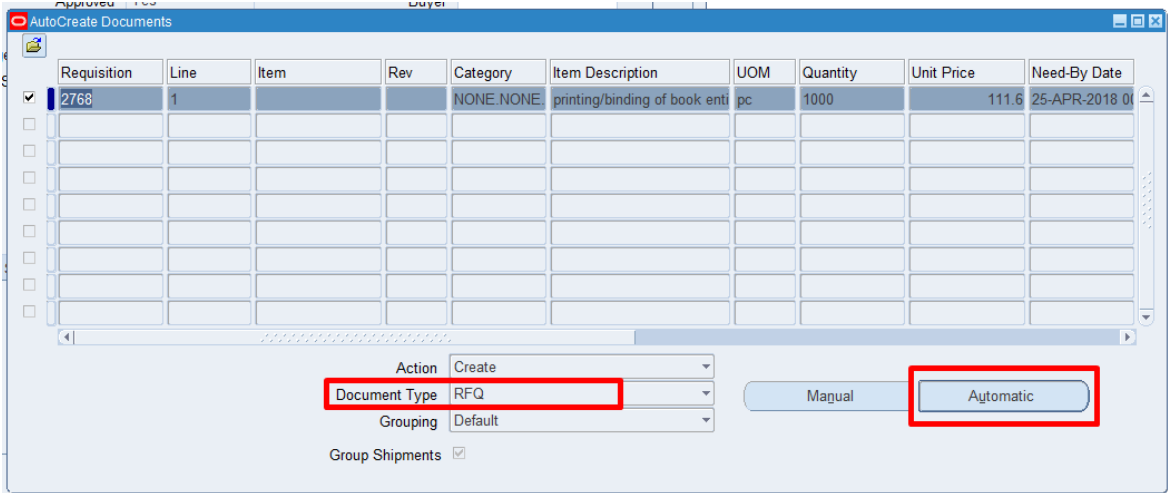
**Step 10.** Click *Find*

**AutoCreate Documents** window will appear

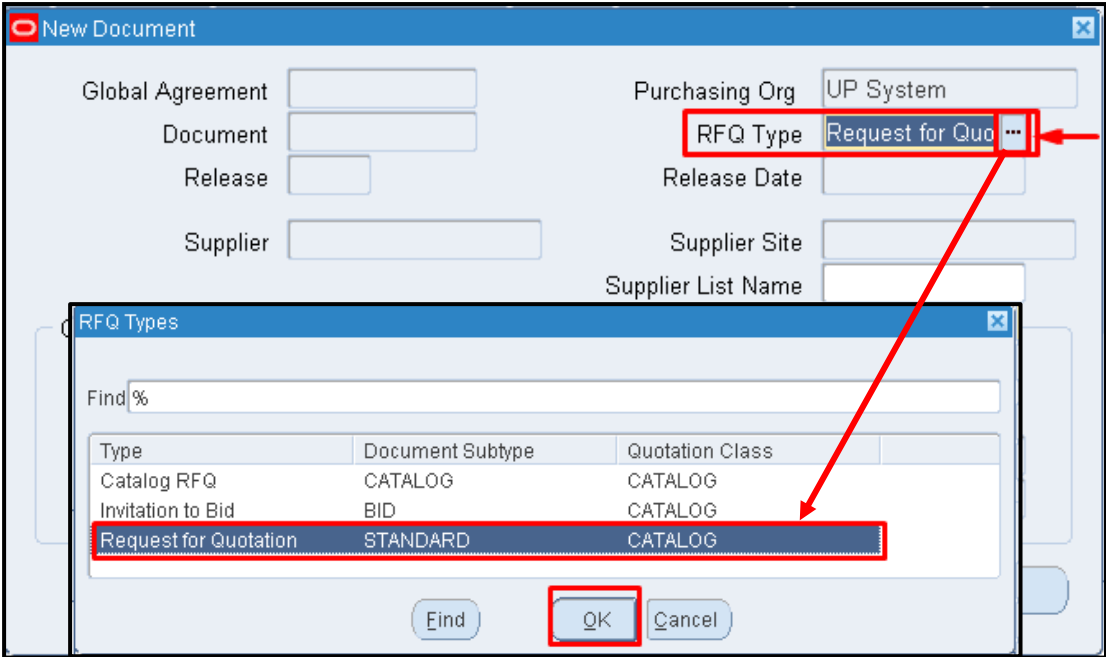**Step 11.** Select the line item that will be included in the RFQ

To select multiple line items, click **Edit** on the menu,

select **Select All**. All items will be ticked



**Step 12.** On the field **Document Type**, select **RFQ**.

Then click **Automatic**

**Step 13.** On *RFQ Type*, click ellipsis.

Choose *Request for Quotation* then click *Ok*

**Step 14.** Click *Create*

| New Document | |
|---|---|
| Global Agreement | | Purchasing Org | UP System |
| Document | | RFQ Type | Request for Quot ⋯ |
| Release | | Release Date | |
| Supplier | | Supplier Site | |
| | | Supplier List Name | |

Currency
| Source | Default |
| Requisition | | Line | |
| Currency | PHP | Rate Type | |
| Rate Date | 19-MAR-2019 | Rate | |

Create        Cancel

**Step 15.** *AutoCreate to RFQs* window will appear. Enter required fields
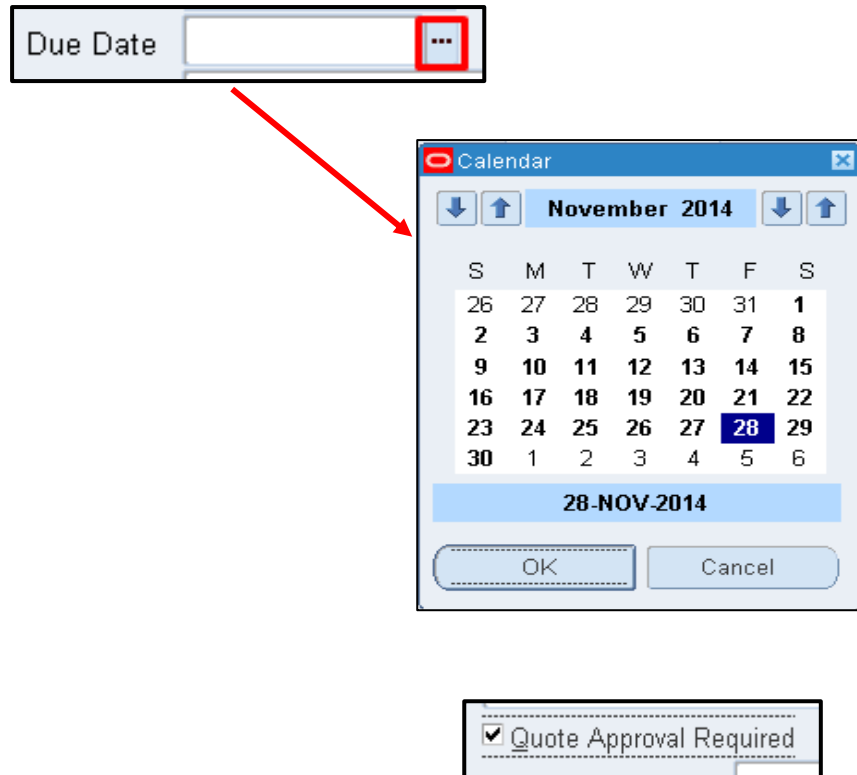
On **Due Date**, click ellipsis.

Select a date. (Based on the calendar day mandated in RA9184)

Enter **Description** of the RFQ following this naming convention: **RFQ for <Description of the generated PR>**

Example:
***RFQ for PR 457 Office Equipment Common Use Items (Q1-2017) – Cash Office***

Click checkbox **Quote Approval Required**.

**Step 16.** On *Status* field, click ellipsis

Select *Active* then click *Ok*

**Step 17.** Click ellipsis for additional information found below the Buyer field

Enter the following details:

- *Purchase Requisition No*
- *Obr/BUR Number*
- *Mode of Procurement*
- *Source of Fund*
- *Responsibility Center*
- *Special Code*

**PO Headers** window will appear

**Purchase Requisition No.** field:
enter the number of the referenced **PR Number**

**Obr/BUR Number** field:
enter the **Obr/BUR Number** of the referenced Purchase Request Number

**Mode of Procurement** field:
to search for the **mode of procurement**, click the ellipsis on the said field, and select the appropriate value for the requisition

**Source of Fund** field:
to search for the **source of fund**, click the ellipsis on the said field, and select the appropriate value for the requisition

**PO Headers**

| Field | Value | |
|---|---|---|
| Purchase Request No. | 2768 | |
| Obr/BUR Number | 12345 | |
| Mode of Procurement | Small Value Procurement | Section 53.9. Negotiated Procure |
| Source of Fund (1) | 101 | General Fund |
| Responsibilitiy Center | SA01005001 | UPS Office of the President |
| Special Code | - | Unspecified |
| Pre-Bid Conference | | |
| Eligibility Check | | |
| Opening of Bids | | |
| Bid Evaulation | | |
| Post Qualification | | |
| Notice of Award | | |
| Notice to Proceed | | |
| Contract Signing | | |
| Item Category | | |

( OK )  ( Cancel )  ( Clear )  ( Help )

*Responsibility Center* field:
to search for the *responsibility center*, click the ellipsis on the said field, and select the appropriate code for the requisition

*Special Code* field:
to search for the *special code*, click the ellipsis on the said field, and select the appropriate code for the requisition

if there is none, select *(-) Unspecified*

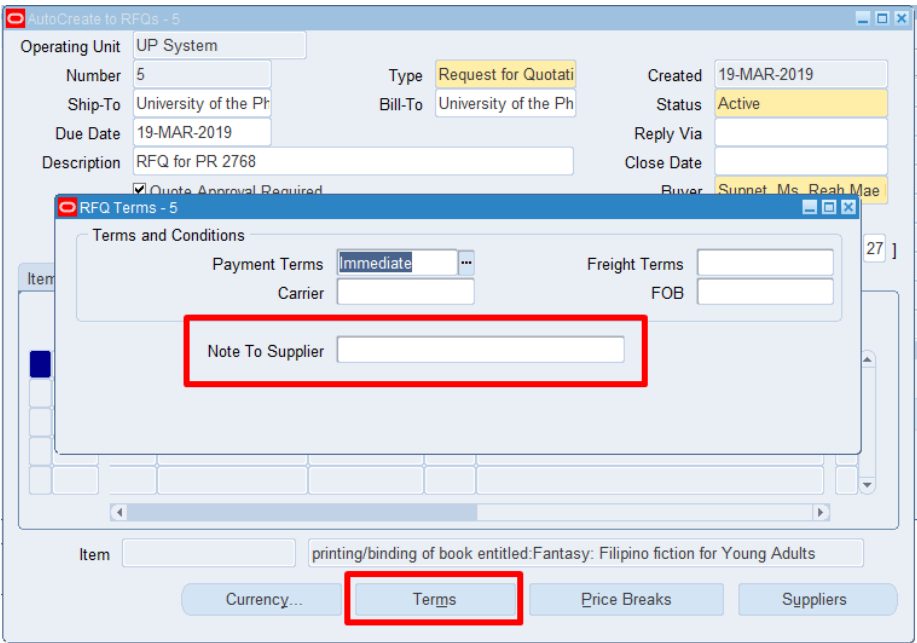**Step 18.** To add *additional information or specifications* to the item line -

click *More Tab* and scroll to the *Note to Supplier field* then enter additional details.

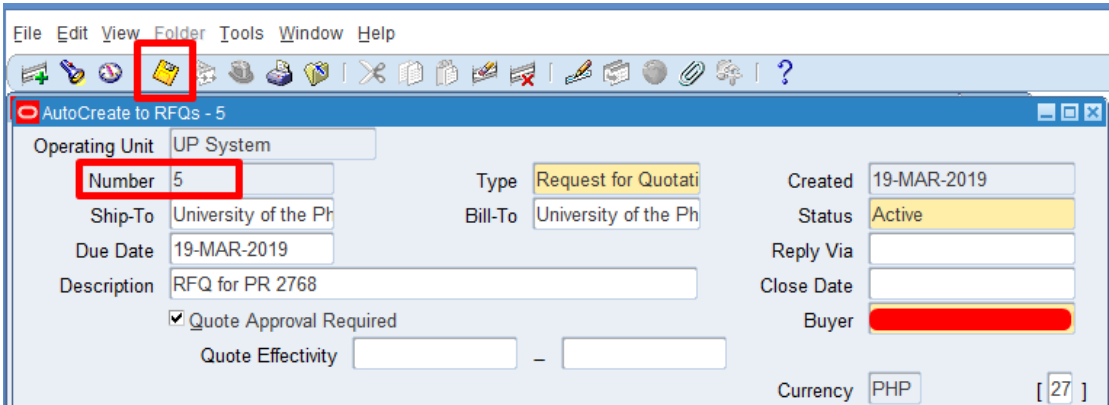The field allows 480 characters.

When adding details use a *semi-colon (;)* to indicate *next line/Enter*

**Step 19.** To add *Notes to Supplier*

click *Term button* and enter additional information in the *Note to Supplier* field then enter additional details.



**Step 20.** Click *Save icon (⬚ )*.

Confirmation of saved RFQ will appear on the lower part of the page

Take note of the RFQ number

## UNIVERSITY OF THE PHILIPPINES
### SYSTEM
Diliman, Quezon City, Metro Manila, NCR
VAT Reg. TIN: 000-864-006-00000

### REQUEST FOR QUOTATION
UPS Office of the President

| | |
|---|---|
| Date | MAR. 19 2019 |
| RFQ No.: | 5 |
| MOP: | Small Value Procurement |

Please quote your lowest price on the item/s listed below, subject to the General Conditions below, stating the shortest time of delivery and submit your Quotation duly signed by your representative not later than (MAR. 19 2019) in the return envelope attached herewith.

Note:
1. All entries must be typewritten or in print.
2. Delivery for a minimum period of 7 calendar days.
3. Warranty shall be for a period of six (6) months for supplies and materials, one (1) year for equipment, from the date of acceptance by the procuring entity.
4. Price validity shall be for a period of 90 calendar days.
5. PhilGEPS Registration Certificate shall be attached upon submission of the quotation (if applicable).
6. Bidders shall submit original brochures showing certifications of the product being offered.
7. Bidders must indicate the BRAND and MODEL NUMBER offered when appropriate.
8. Others: Deliver on time

RFQ for PR 2768

| ITEM NO. | GENERAL DESCRIPTION | UOM | QTY | Compliance with technical specifications (Pls. check) YES | Compliance with technical specifications (Pls. check) NO | UNIT PRICE | TOTAL PRICE | QUOTED UNIT PRICE | TOTAL QUOTED PRICE |
|---|---|---|---|---|---|---|---|---|---|
| 1 | printing/binding of book entitled: Fantasy: Filipino fiction for Young Adults  3 copies of Fantasy: Filipino fiction for Young Adults | pc | 1000 | | | PHP 111.60 | PHP 111,600.00 | | |
| | | | | | | TOTAL | PHP 111,600.00 | | |

TOTAL QUOTED AMOUNT IN WORDS: One Hundred Eleven Thousand Six Hundred

Please quote at your government price (including VAT) and state the time within which you can make delivery. It will be appreciated if we can have your quotation in the office as soon as possible on or before the deadline stated herein.

ASSOCIATE PROFESSOR 7

After having carefully read and accepted your General Conditions, I/We quote you on the items at prices noted above.

| | | | |
|---|---|---|---|
| Name of the Company: | | Tel. No. : | |
| Address: | | Fax No. : | |
| Name of Representative: | | Email Address: | |
| Position: | | | |
| Signature: | | Date: | |

**Result Information:**

The line of items you have chosen will appear on the document like this