



# University of the Philippines



## **SPCMIS**

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



# Creation of RFQ



# SPCMIS User Manual

## *iProcurement*

Author: Julius Ermitanio, Michael Angelo Soliven, Reah Mae Supnet & Carlo Martin Evangelista  
Creation Date: 27 October 2014  
Last Updated: 17 May 2019  
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

<b>Script ID</b>	UGSP090141
<b>Script Name</b>	Create RFQ
<b>Information System</b>	Supplies, Procurement, and Campus Management Information System
<b>Functional Domain</b>	Purchasing Buyer
<b>Purpose</b>	To create a Request for Quotation
<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>	After creating a PR and having it approved the originator will create an RFQ that will be given to Suppliers
<b>Author</b>	Reah Mae Supnet & Carlo Martin Evangelista



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

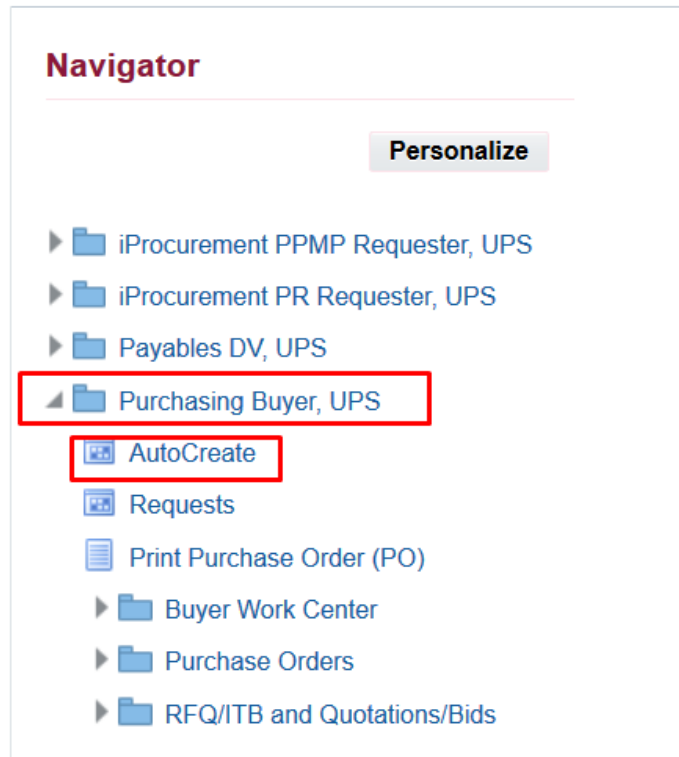
**Step 2.** Log-in your credentials (e.g. *username* and *password*)

User Name

Password

Login Cancel





**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**



The screenshot shows the 'Find Requisition Lines' window with the following fields and annotations:

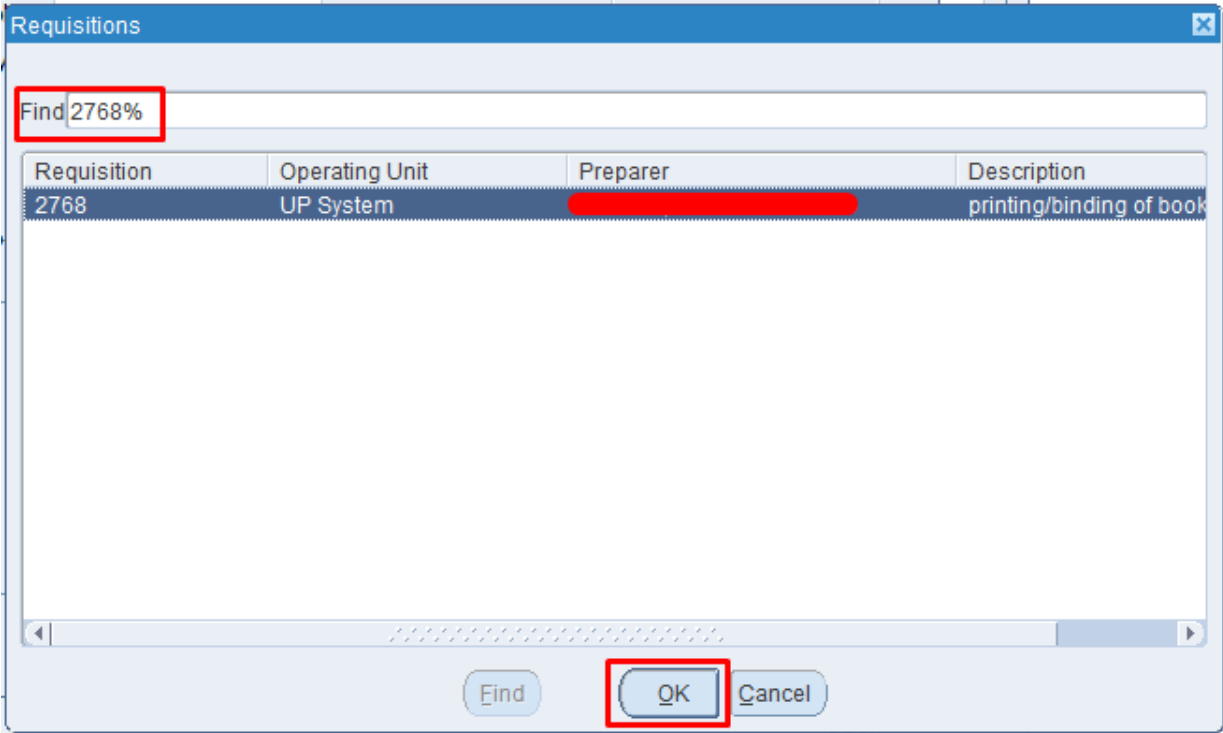
- Operating Unit:** UP System
- Approved:** Yes
- Requisition:** [Empty] with an ellipsis icon and a red arrow pointing to it.
- Buyer:** [Empty] with a red box around it and the text 'clear this field' above it.
- Requester:** [Empty]
- Preparer:** [Empty]
- Supplier Sourcing:** [Dropdown]
- Supplier List:** [Empty]
- Supplier Site:** [Empty]
- Document Type:** [Empty]
- Document:** [Empty]
- Global:**
- VMI Only:**
- Shgw External Locations:**
- Minimum Amount:** [Empty]
- Currency:** [Empty]
- Rate Type:** [Empty]
- Ship-To:** [Empty]

At the bottom of the window, there are two buttons: 'Clear' and 'Find'.

**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



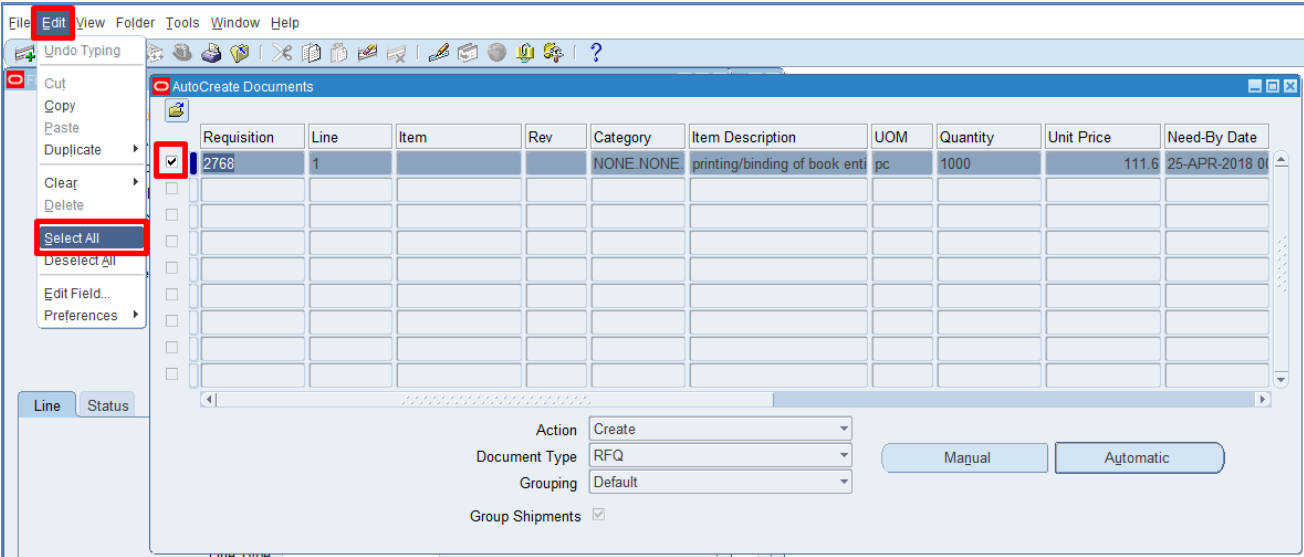
**Step 8.** Type the requisition number on **Find** field.

Click **Find**

**Step 9.** Select a requisition then click **Ok**

**Step 10.** Click *Find*

The screenshot shows a software window titled "Find Requisition Lines". The window contains several input fields and buttons. A red box highlights the "Requisition" field, which contains the text "2768". Another red box highlights the "Find" button at the bottom right of the window. Other visible fields include "Operating Unit" (UP System), "Approved" (Yes), "Buyer", "Requester", "Preparer", "Supplier List", "Supplier Site", "Document", "Minimum Amount", "Currency", "Rate Type", "Emergency PO Number", "Supplier Sourcing", "Supplier", "Document Type", "Ship-To", "Global", "VMI Only", "Show External Locations", "Item, Rev", "Job", "Category", "Description", and "Line Type". There are also "Clear" and "Find" buttons at the bottom.

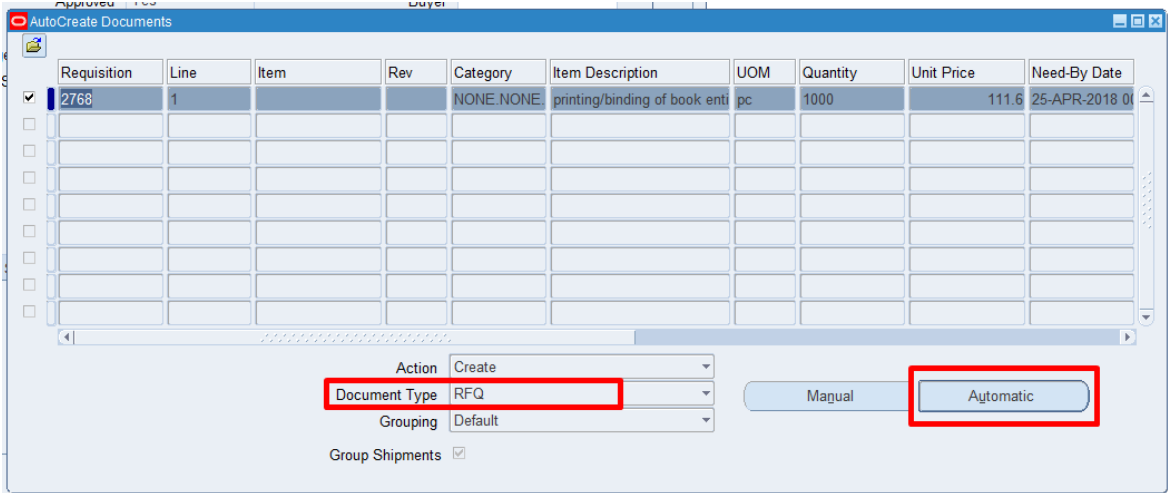


**AutoCreate Documents** window will appear

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

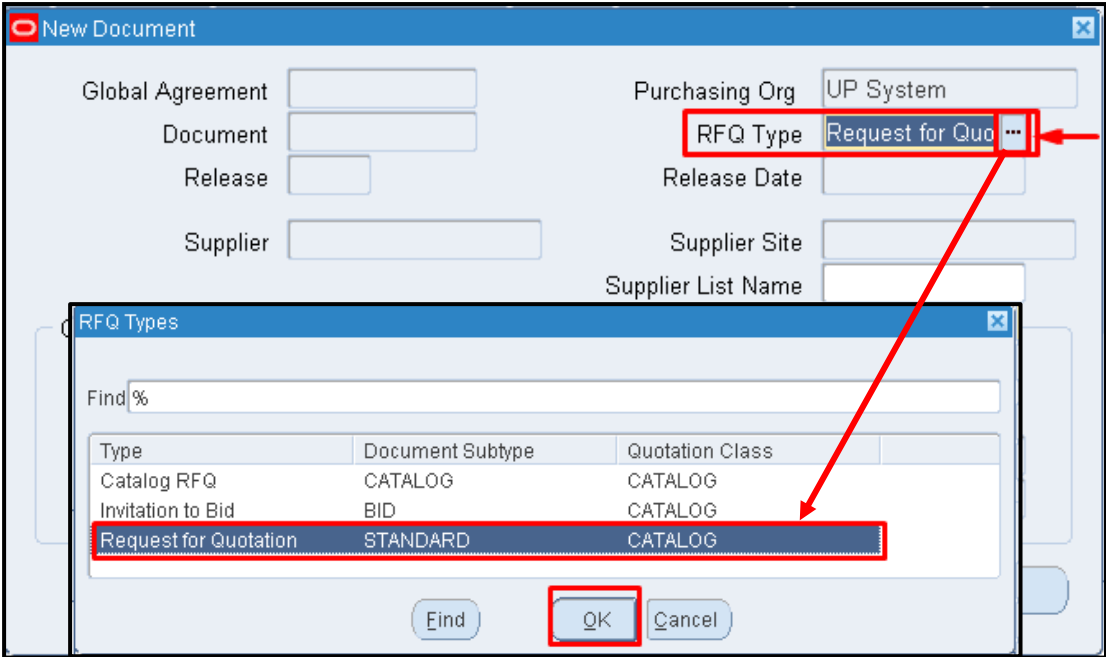
To select multiple line items, click **Edit** on the menu,

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**

The screenshot shows a 'New Document' dialog box with the following fields and values:

Global Agreement	<input type="text"/>	Purchasing Org	UP System
Document	<input type="text"/>	RFQ Type	Request for Quot...
Release	<input type="text"/>	Release Date	<input type="text"/>
Supplier	<input type="text"/>	Supplier Site	<input type="text"/>
		Supplier List Name	<input type="text"/>
<b>Currency</b>			
Source	Default	Line	<input type="text"/>
Requisition	<input type="text"/>	Rate Type	<input type="text"/>
Currency	PHP	Rate	<input type="text"/>
Rate Date	19-MAR-2019		

At the bottom of the dialog, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a red rectangular border.

**Step 14.** Click **Create**

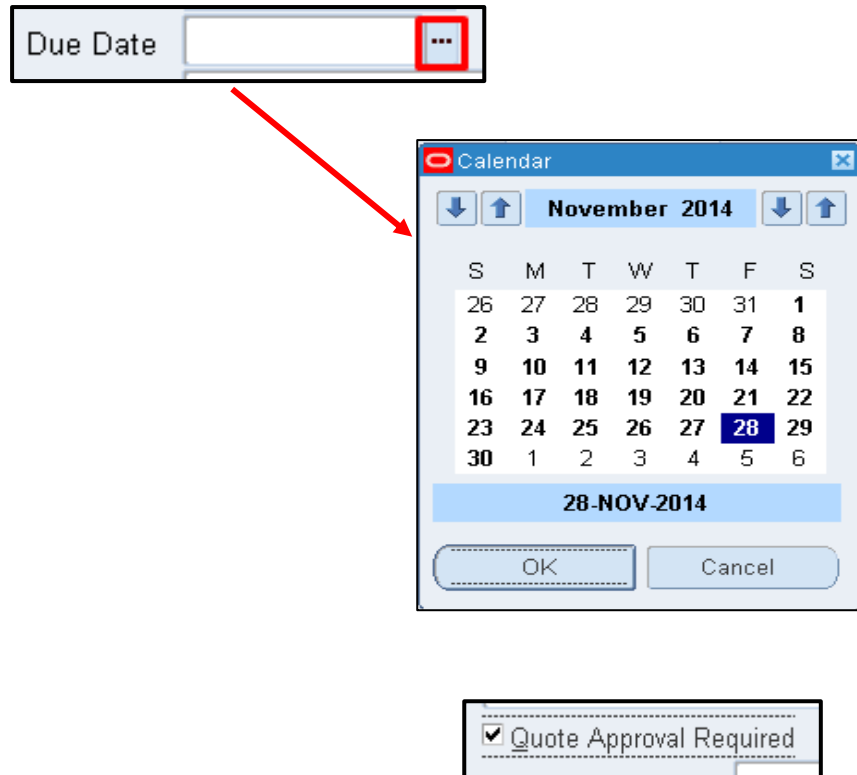
Operating Unit: UP System  
Number: 5  
Ship-To: University of the Ph  
Type: Request for Quotati  
Bill-To: University of the Ph  
Created: 19-MAR-2019  
Status: In Process  
Reply Via:   
Close Date:   
Buyer:   
Quote Approval Required:   
Quote Effectivity: -   
Currency: PHP

Num	Type	Item	Rev	Category	Description	UOM
1	Goods			NONE.NONE.NON	printing/binding of book	pc

Item: printing/binding of book entitled:Fantasy: Filipino fiction for Young Adults

Buttons: Currency..., Terms, Price Breaks, Suppliers

**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

Num	Type	Item	Rev	Category	Description	UOM
1	Goods			NONE.NONE.NON	printing/binding of book	pc

Select **Active** then click **Ok**

Status	Description
Active	Active
Closed	Closed
In Process	In Process

AutoCreate to RFQs - 5

Operating Unit: UP System

Number: 5      Type: Request for Quotati

Ship-To: University of the Ph      Bill-To: University of the Ph

Due Date: 19-MAR-2019      Created: 19-MAR-2019

Description: RFQ for PR 2768      Status: Active

Quote Approval Required      Reply Via: [ ]

Quote Effectivity: [ ] - [ ]      Close Date: [ ]

Buyer: [Redacted]      Currency: PHP

[...]

Num	Type	Item	Rev	Category	Description	UOM
1	Goods			NONE.NONE.NON	printing/binding of book	pc

Item: printing/binding of book entitled:Fantasy: Filipino fiction for Young Adults

Currency...    Terms    Price Breaks    Suppliers

**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**

The screenshot shows a window titled "PO Headers" with the following fields:

- Purchase Request No. (highlighted in red)
- Obr/BUR Number (highlighted in red)
- Mode of Procurement (highlighted in red)
- Source of Fund (1) (highlighted in red)
- Responsibility Center (highlighted in red)
- Special Code (highlighted in red)
- Pre-Bid Conference
- Eligibility Check
- Opening of Bids
- Bid Evaluation
- Post Qualification
- Notice of Award
- Notice to Proceed
- Contract Signing
- Item Category

Buttons at the bottom: OK, Cancel, Clear, Help.

**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

**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**

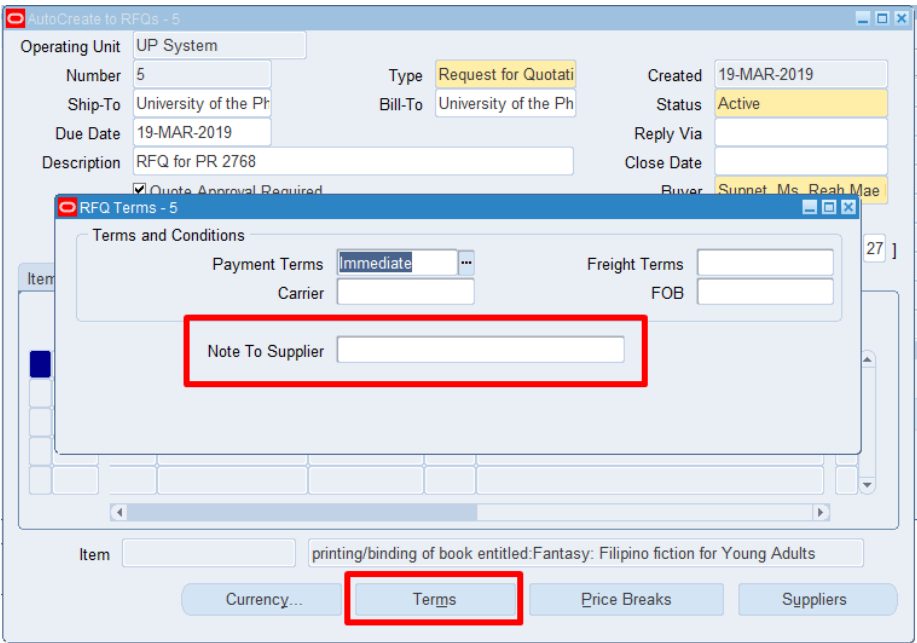
Num	Task Number	Contract Num	Rev	Note To Supplier
1				3 copies of Fantasy: Filipino fiction for Young Adu

**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.

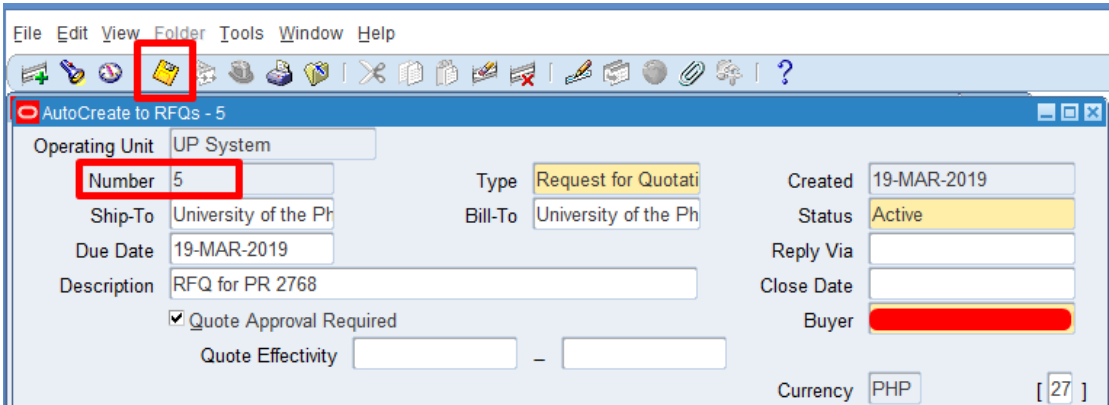
The field allows **480 characters**.

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:**

- All entries must be typewritten or in print.
- Delivery for a minimum period of 7 calendar days.
- 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.
- Price validity shall be for a period of 90 calendar days.
- PhilGEP's Registration Certificate shall be attached upon submission of the quotation (if applicable).
- Bidders shall submit original brochures showing certifications of the product being offered.
- Bidders must indicate the BRAND and MODEL NUMBER offered when appropriate.
- Others: Deliver on time

RFQ for PR 2768

ITEM NO.	GENERAL DESCRIPTION	UOM	QTY	Compliance with technical specifications (Pls. check)		UNIT PRICE	TOTAL PRICE	QUOTED UNIT PRICE	TOTAL QUOTED PRICE
				YES	NO				
1	printing/binding of book entitled: Fantasy: Filipino fiction for Young Adults 3 copies of Fantasy: Filipino fiction for Young Adults	pc	1000			PHP 111.80	PHP 111,600.00		
<b>TOTAL</b>							<b>PHP 111,600.00</b>		
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