

### University of the Philippines

## SPCMIS

Supplies, Procurement, and Campus Management Information System



## CREATION OF APR FOR PSDBM



#### **SPCMIS User Manual**

#### *iProcurement*

Author:	Julius Ermitanio, Michael Angelo Soliven & Reah Mae Supnet
Creation Date:	14 January 2014
Last Updated:	19 April 2017
Document Ref:	SPCMIS User Manual – Creation of APR for (PS-DBM)
Version:	4.0

#### **Approvals:**

Recommending A	Approval
----------------	----------

Approved

Creation of APR for (PS-DBM)

#### 1. DOCUMENT CONTROL

#### 1.1 Change Record

Date	Author	Version	Change Reference:
14 January 2014	Julius Ermitanio & Michael Angelo Soliven	1.0	Initial Issue
30 January 2014	Julius Ermitanio & Michael Angelo Soliven	1.0	Minor Revision
28 October 2014	Julius Ermitanio & Michael Angelo Soliven	2.0	Update
01 December 2014	Julius Ermitanio & Michael Angelo Soliven	3.0	Update
19 April 2017	Reah Mae Supnet	4.0	Update

Creation of APR for (PS-DBM)

#### 2. Description

Script ID	UMSP060140
Script Name	Creation of APR for (PS-DBM)
Information System	Supplies, Property and Campus Management Information System
Functional Domain	Purchasing
Purpose	
Data Requirement	
Dependencies	
Scenario	
Author	Julius Ermitanio, Michael Angelo Soliven & Reah Mae Supnet

Creation of APR for (PS-DBM)



Step 1. Go to <u>uis.up.edu.ph</u>

**Step 2.** Log-in your credentials (Username and Password)

**NOTE:** After receiving notification of approved PR (PS-DBM), Buyer will create APR for the common-use item to be purchased in PS-DBM

To create an Agency Purchase Request (APR) the user should be a Buyer first.

To create a buyer follow Create Buyer User Guide.

Creation of APR for (PS-DBM)

University of the Philipp	ines					
			🚱 Favo	rites 🔻		Diagnostics Logout H
terprise Search All	G	)	Search Re	sults Dis	play Prefer	ence Standard 👻
acle Applications Home Page						Logged In AS KM30P
Main Menu	Worklist					
Personalize				Fu	ll List	
🕀 🗀 iProcurement PPMP Requester, UPS	From	Туре	Subject	Sent	Due	
🕀 🛅 iProcurement PR Requester, UPS	There are no notifications in this view.					
🕀 🛄 Purchasing Buyer, UPS		Tota	0			
System Administrator     JP Employee Self Service	✓TIP <u>Vacation Rules</u> - Redirect or auto-respo ≪TIP <u>Worklist Access</u> - Specify which users ca	nd to notific an view and	cations. I act upon y	our notif	ications.	

Step 3. In the *Main Menu*, select *Purchasing Buyer, UP* 

Creation of APR for (PS-DBM)



Step 4. Choose the *Buyer Work Center* folder

Creation of APR for (PS-DBM)



Creation of APR for (PS-DBM)

Requisitions Orders Agreements Deliverables Negotiations Suppliers		Step 6. Select Requisitions
Demand Workbench		tab and select <b>Demand</b>
Demand Workbench  Indicate required field	Document Builder	lab and select <b>Demand</b>
unurares required neid	* OU UP Diliman	<i>Workbench</i> subtab.
Views	Number of Lines 0	
New My Requiring Co. Derecondiza	Search	
Select Requests: Add Return Reassign Split Split		
Select All Select None		
Select OU Requisition Line Item/Job Qty Unit Price Curr/Need-By Source Actions		
UPD 43.4 4 Computer 100 pc 25000 PHP 30-Oct-2014 00:00:00		
UPD Stars A Fiber optic 2 1 lb 1000000 PHP 30-Oct-2014 00:00:00		
Purchasing		Click <b>Search</b> button
Requisitions Orders Suppliers  Demand Workbench Summary      Summary	.ogout Preferences Help Diagnostics	
Demand Workbench	Document Builder	
* Indicates required field	Type New Order	
Views	* OU UP System 🔄 🔍	
	Number of Lines 0	
Fearch	22	
Search		
View My Requisitions Concernment of		
Select OU Requisition Line Item/Job Qty Unit Price Curr Need-By Source On RFQ Actions		
No results found.		
Requisitions Orders Suppliers Home Logout Preferences Help Diagnostics		
About this Pane Privacy Statement	Convight (c) 2006 Oracle All rights recorded	
	oopyngin (c) 2000, Oracic. All rights reserved.	

Creation of APR for (PS-DBM)

	🔒 Navigator 🗸	🚱 Favorites 🔻	Home I	Logout Preferences Help Diagnostics	Step 7. Type the PR no. in
Requisitions Orders Suppliers					the <i>Requisition</i> field
Demand Workbench   Summary					
Requisitions: Demand Workbench >					Then click <b>Go</b>
Demand Workbench				Document Builder	
* Indicates required field			Save Search	Type New Order 🖌	
				* OU UP System 🚽 🔍	
Search				Number of Lines 0	
			Views		
Show table data when all conditions are met					
O Show table data when any condition is met.					
Buver is					
Requisition is 457					
Category is 🗸					
Supplier is					
	T				
Go Clear Add Another Buyer	Add				
Select OU Requisition Item/Job Qty Unit Price Curr Need-By Soc	urce Actions				
No results found.					

Creation of APR for (PS-DBM)

Demand Workbench     Summary       Requisitions: Demand Workbench >     Document Builder       Demand Workbench     Document Builder	
Requisitions: Demand Workbench > Demand Workbench Document Builder Document Builder	
Demand Workbench Document Builder	
* Indicates required field Save Search Type New Order	
Search Number of Lines 0	
Views	
Show table data when all conditions are met.	
O Show table data when any condition is met.	
Buyer is 🗸	
Requisition is V 457 V	
Category is V	
Supplier is V	
Go Clear Add Another Buyer V Add	
Select Requests: Add Return Reassign Split Split	
Select All Select None	
Select 00 Requisition Item/Job Qty Unit Price Curr Need-By Source Actions	
UPS 457.3 UPS OM-OM-000003 1 un 26000 PHP 07-Jun-2017 11:06:25 32.3	
UPS       457.2       UPS OM-OM-0000002       1       un       2500       PHP       07-Jun-2017 11:06:25       32.2         32.2       32.2       32.2       32.2       32.2       32.2       32.2	
UPS       457.1       UPS OM-OM-0000001       3       un       250000       PHP       07-Jun-2017 11:06:25       32.1       Image: Comparison of the com	

Creation of APR for (PS-DBM)

Requisitions Orders Suppliers	Step 9. then click Add
Demand Workbench   Summary	
Requisitions: Demand Workbench >	
Demand Workbench Document Builder	
* Indicates required field Type New Order V	
* OU UP System V	
Search Number of Lines 0	
Views	
Show table data when all conditions are met.	
○ Show table data when any condition is met.	
Buyer is 🗸	
Requisition is y 457 Q	
Calegory is V	
Supplier is v Supplier	
Go Clear Add Another Buyer V Add	
Select Requests: Add Return Reassign   Cancel Split Split	
Select All Select None	
Select OU Requisition Item/Job Qty Unit Price Curr/Need-By Source Actions	
UP Warehouse, UP WAREHOUSE	
UPS 457.3 UPS OM-OM-000003 1 un 260000 PHP 07-Jun-2017 11:06:25 32.3	
UP Warehouse, UP WAREHOUSE	
UPS 0M-0M-000001 3 un 250000 PHP 07-Jun-2017 11:06:25	

Creation of APR for (PS-DBM)

📅 Navigator 🔻 🇔 Favorites 🔻 🛛 Home	Logout Preferences Help Diagnostics
Requisitions Orders Suppliers	
Demand Workbench   Summary	
Demand Workbench	Document Builder
* Indicates required field Save Search	Type New Order OU UP System
Search	Agreement 💦 🔍
Views	Supplier UP Warehouse
Show table data when all conditions are met.	
Show table data when any condition is met.	
Buyer is 💌 🔄	* Style Standard Purcha
Requisition is 🖌 457 🔄 🔍	Group Shipments
Category is 🔽	Recently Added Items
Supplier is	Arconditioners 3 un Automatic Emergency 1 up
Go Clear Add Another Buyer	Lights 1 un Digital Duplicator 1 un
Select OU Requisition Item/Job Qty Unit Price Curr Need-By Source Actions	Number of Lines - D
No results found.	Total 1.012.500.00
	РНР
Save Search	Clear Update Create
Requisitions Orders Suppliers Home Logout Preferences Help Diagnostics	pourceorcate

**Step 10.** Added items will be reflected in the *Document Builder* found on the right side of the page

Creation of APR for (PS-DBM)

Document Builder Type New Order OU UP System	Search	Cance! Select	<b>Step 11.</b> On <b>Supplier</b> field, click <b>Search</b> button.
Agreement	To find your item, select a filter item in the pulldown list and Search By Supplier  Procurement Go	enter a value in the text held, then select the "Go" button.	Enter <b>Procurement%Service%</b>
Site UP WAREHOL Q	Results		Then click <i>Go</i> .
* Style Standard Purg Q	Select Quick Select Supplier  Procurement Service (PS-DBM	Supplier Num         On Hold           1)         990         No	
Recently Added Items Toilet Deodorant Cake, Deodorizer/Moth Proofer 80 pck	About this Page	Cancel Select	
Number of Lines 1 Total 1,872.00 PHP	Search To find your item, select a filter item in the pulldown list and	enter a value in the text field, then select the "Go" button.	Quick Select <b>Procurement Service</b> (PS-DBM).
	Search By Supplier Procurement Go		
	Colort Outer Outer	Coming Non On Unid	
	Select         Supplier           Image: Supplier         Procurement Service (PS-DBM)	Supplier num         On Hold           I)         990         No	

Creation of APR for (PS-DBM)



Creation of APR for (PS-DBM)

Step 13. Click Create button

Requisitions Orders		
Demand Workbench	Summary	
Demand Workbench		Document Builder
* Indicates required field	Save Search	Type New Order OU UP System
Search ● Show table data when a ○ Show table data when a	Il conditions are met.	Agreement Supplier UP Warehous Site UP WAREHOU Currency PHP
Buyer is	Bagsic, Mr. James Bened	* Style 🛛 Agency Procu 🔍
Requisition is Category is Supplier is		Recently Added Items Toilet Deodorant Cake, Deodorizer/Moth Proofer 80 pck
Go Select OU Re No results found.	Clear Add Another Buyer Add guisition Item/Job Qty Unit Price Curr Need-By Source Actions	Number of Lines 1 Total 1,872.00 PHP Clear Update Create

# Requisitions Orders S Demand Workbench Summary Marning The following warnings occurred when creating the document. Do you wish to ignore them and continue? S 34, 1: A greement or style referenced on this line is different than the agreement or style specified in the document. Duidler region. The line agreement or style reference will not be applied to the resulting document. No Yes Yes

Step 14. Click Yes.

Creation of APR for (PS-DBM)

equisitions   Orders	Workhon	*						
pdate Agency Procure	ement Re	auest 39						
Indicates required fiel	ld						Cancel Actions Delete	- Co Save Approval Options Sub
							cancej Actions Delete	Go Save Approval options Sub
Search								
under Under Co	de a de de a	Distribution						
Header Lines So	chedules	Distribution	IS					
	C	perating Unit	JP System				Total	1,872.00 PHP 🚽 🔍
		Status	Incomplete				* Buver	Bagsic, Mr. James Benedict Esquerra
		Supplier	UP Warehouse		<u> </u>		Description	
		Supplier Site	UP WAREHOUSE		Q			
	Su	pplier Contact			<u> </u>			
C	Communic	ation Method	None 👻				Confirming Order	No 👻
Torme								
i ci ilio								
			Curkers				the fault of the Table and the	Curtar
		SII-10 Location	System		<b>`</b>		* Default Ship-To Location	System
	P	ayment Terms	Immediate		<u> </u>		Ship Via	
	F	ay On Receipt	No 🔻				Freight Terms	Q
	A	knowledge By					FOB	<b></b>
Req	quired Ac	knowledgment	None	-				
Details								
ObR/BUR N	umber							
UP Reference N	umber		_					
ther Terms and Con	ditions							
	Note			-				
* Mode of Procure	ement							
a Course of	Erund			<u> </u>				
Source of	Fund		<u> </u>					
Attachments							Notes	
							Note to Supplier	
Add Attachment								
Add Attachment	Tuna	Description	Catagoni	Undate	Delete	Dublish to Catalog		
Add Attachment	Туре	Description	Category	Update	Delete	Publish to Catalog		
Add Attachment itle o results found.	Type	Description	Category	Update	Delete	Publish to Catalog	Note to Receiver	ii.
Add Attachment tle o results found.	Type	Description	Category	Update	Delete	Publish to Catalog	Note to Receiver	ь
Add Attachment tle o results found.	Туре	Description	Category	Update	Delete	Publish to Catalog	Note to Receiver	A
Add Attachment tle o results found.	Туре	Description	Category	Update	Delete	Publish to Catalog	Note to Receiver	A

*Update Agency Procurement* Request window will appear.

Creation of APR for (PS-DBM)

Header Lines Schedules Distribu	ions		
Operating Unit Status Supplier	UP Philippine General Hospital Incomplete Decoursement Service (PC-DBM)	Total * Buyer	287,784.17 PHP 🔍 🔍 Sinarao, Ms. Fenie Andres 🔬 🔍
Supplier Site		Description	APR UP PGH Computer Software (1Q 2016)
Supplier Contact Communication Method	None I	Confirming Order	NO T

Search				
Header Lines Schedules Distribu	tions			
Operating Unit Status Supplier Supplier Site Supplier Contact Communication Method	UP Baguio Incomplete Procurement Service (PS-DBM) DBM-CAR DBM-CAR None	Total       120,432.00       PHP           * Buyer       Bagsic, Mr. James Benedict Esg          Description       APR UP Baguio (2Q 2015)		
Terms				
Bill-To Location Payment Terms Pay On Receipt Acknowledge By Required Acknowledgment	University of the Philippines Bag Q	Default Ship-To Location     University of the Philippines Bag     Ship Via     Freight Terms     FOB     Subscripts		

**Step 15.** Enter the **Description** of the APR.

In entering the description, follow this naming convention:

APR UP [Constituent Unit] [Item Category] Office (Quarter-Year)

Example: APR UP Diliman Office Equipment - Cash Office (1Q-2017)

Update **the Default Ship-To Location** field.

Creation of APR for (PS-DBM)

😻 Search and Select	Search and Select List of Values - Mozilla Firefox						
🛞 putodev. <b>up.edu</b>	🛞 putodev. up.edu.ph:8005/OA_HTML/cabo/jsps/a.jsp?_t=fredRC&enc=UTF-8&_minWidth=750&_minHeight=550&configName=OACor						
Search and Select	Search and Select: Default Ship-To Location						
				Cancel Select			
Search							
Search By Ship-	To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button. Search By Ship-To VUPB%Supply Go Becults						
nesures							
Quick Select Select	Ship-To	Org	Description	Address			
	UPB Supply and Property Management Office         UPB UPB Supply and Property Management Office         General Central Road, Baguio City, CAR 2600, Philippines						
About this Page							

Enter **CU%Keyword** in the Search field

then click Go button.

Example: UPV%Property or UPB%Supply or UPPGH%Property

Quick select the office.

Creation of APR for (PS-DBM)

Doc Ref: SPCMIS User	Manual – Creation	of APR for (PS-DBM)
	Mariaal Oroalion	

Details          Requisition No.         ObR/BUR Number         * Mode of Procurement         * Source of Fund (1)		Step 16. On Mode of Procurement, click Search button
Search Search To find your item, select a filter item in the pulldown I Search By Mode of Procurement - Agency to Agen Results	Cance!       Select         st and enter a value in the text field, then select the "Go" button.         Icy       Go	Enter <i>Agency to Agency</i> then click <i>Go</i>
Search and Select: Mode of Procurement         Search         To find your item, select a filter item in the pulldown item         Search By Mode of Procurement <ul> <li>Agency to Agency</li> <li>Agency to Agency</li> </ul> Select Quick Select Mode of Procurement       Agency to Agency	Cancel       Select         st and enter a value in the text field, then select the "Go" button.         ncy       Go         Description         Section 53.1. Negotiated Procurement (Agency-to-Agency)	Quick Select Agency to Agency.

Creation of APR for (PS-DBM)

Details Requisition N ObR/BUR Numb * Mode of Procureme * Source of Fund ( Source of Fund (		Step 17. On <i>Mode of</i> <i>Procurement</i> , click <i>Search</i> button On <i>Source of Fund</i> , click <i>Search</i> button.
	Search and Select: Source of Fund	
	Cance! Select	
	Search To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button. Search By Source of Fund  Go	Click <b>Go</b> to view all possible results.
	Results	
	Search and Select: Source of Fund Cancel Select	
	Search To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.	Quick Select a source of fund
	Search By Source of Fund 💌 😡 Go	
	Results	
	Select Ouick Select Source of Fund Description	
	General Fund	
	C Revolving Fund	
	C Irust Fund	

Creation of APR for (PS-DBM)

Doc Ref: SPCMIS User Manual -	- Creation of APR for (PS-DBM)

Requisition No.	
* Obr/BUR Number	-
* Mode of Procurement	Agency to Agency
* Source of Fund (1)	Section 53.5. Negotiated Procurement (Agency-to-Agency) 101  General Fund
Responsibility Center	
Special Code	

Requisition No.	
* Obr/BUR Number	-
* Mode of Procurement	Agency to Agency 🔄 🔍
* Source of Fund (1)	Section 53.5. Negotiated Procurement (Agency-to-Agency) 101  General Fund
Responsibility Center	UPM PGH Purchasing Office
Special Code	<u>ч</u>

Step 18. On *Responsibility Center* click ( )*Search* button.

On Search By select Description

Enter the responsibility center with (%) to view all possible results.

Example: %UPS%Cash%

Then click Go.

If necessary, enter the **Special Project Code.** 

Creation of APR for (PS-DBM)

Requisitions Orders			^
Requisitions: Demand Workbench >			
Update Agency Procurement Request 39			
* Indicates required field		Cance! Actions Delete	Go Save Approval Options Submit
Search			
Header Lines Schedules Distribution	ns		
Operating Unit Status Supplier	UP System Incomplete UP Warehouse	Total * Buyer Description	1,872.00 PHP 🔟 🔍 Bagsic, Mr. James Benedict Esguerg 🔍
Supplier Site Supplier Contact	UP WAREHOUSE	Description	APR UP 200080 (1Q-2014)
Communication Method	None 🔻	Confirming Order	No 🔻
Terms			
Bill-To Location	System 🔟 🔍	* Default Ship-To Location	System
Payment Terms	Immediate 🔄 🔍	Ship Via	<u> </u>
Pay On Receipt	No 🔻	Freight Terms	<u> </u>
Acknowledge By		FOB	
Required Acknowledgment	None -		

**Step 19.** On *Mode of Procurement*, click *Search* button Click *Submit*.

Creation of APR for (PS-DBM)

Requisitions	Orders					
Demand Workb	Demand Workbench   Summary					
Confirmation	n curement Request 39 has been submitted for approval.					
Demand Workbe	Demand Workbench					
* Indicates requ	ired field					
Search						

Confirmation of submitted APR

#### **Result Information:**

#### **Expected Results:**

Agency Procurement Request created.

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

Creation of APR for (PS-DBM)

Creation of APR for (PS-DBM)