

MCIS Procurement Screen

ERDF-WI-8-005

Related Documents

Work Instruction	ERDF-WI-8-001 Claims Work Instruction for Grant Recipients
Guidance	ERDF-GN-1-008 MCIS Claim Editor User Guide

1. About the procurement screen

The procurement screen is a new development in MCIS which has been added to enable grant recipients to enter details of the project related procurement activity directly onto MCIS. The screen replaces the existing ERDF-Forms-8-005 Procurement Register and should be used going forward.

2. Where to find the procurement screen

To access the new procurement screen on MCIS you will need to have either “claim editor” or “project deliverer” roles. Once you are logged into MCIS in one of these roles the new procurement screen can be found in the profile section of any project record on MCIS.

| 0RZ - YES

Claims
Profile
Offer Details
History

Overview
Assets
Project Procurement
A16

Contractual Details

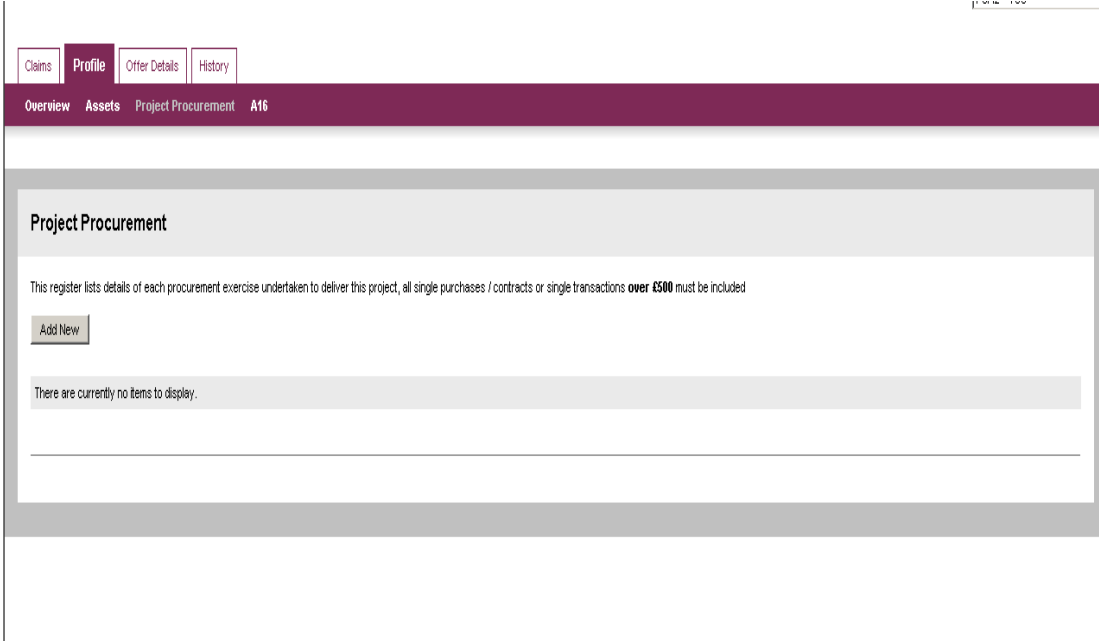
NB The information in this section can only be amended in the [Offer Details](#).

Applicant: Business & Enterprise North East

Address:

Unit 6, Spectrum Business Park, Seaham, Durham, SR7 7TT

Select “Project Procurement” from the profile tab to take you into the new screen.



Claims Profile Offer Details History

Overview Assets Project Procurement A16

Project Procurement

This register lists details of each procurement exercise undertaken to deliver this project, all single purchases / contracts or single transactions **over £500** must be included

Add New

There are currently no items to display.

3. How to use the procurement screen

The procurement register is designed to capture a full list of each procurement exercise undertaken to deliver the project. This includes procurements undertaken during the life of the project, but also anything that took place prior to the ERDF application where the contract is still in operation and for which costs incurred under this contract will be claimed through the ERDF project. The list needs to include all single purchases / contracts or single transactions **over £500**.

To enter items into the register click “add new” and the following screen will come up.

[Claims](#)
[Profile](#)
[Offer Details](#)
[History](#)

[Overview](#)
[Assets](#)
[Project Procurement](#)
[A16](#)

Project Procurement

This register lists details of each procurement exercise undertaken to deliver this project, all single purchases / contracts or single transactions over £500 must be included

[Add New](#)

Mode	Title of contract and / or brief description of goods and / or services procured	Name of Contractor / Service provider	Reference Number	Date of Contract / Purchase	Supplies, Services or Works?	Total Value of Contract (£, Net of VAT)	Procurement Method
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> (dd/mm/yyyy)	Supplies ▾	<input type="text"/>	Eligible Preferred Supplier ▾

Trusted sites | 100%

4. Completing the Procurement Register

The grant recipient must complete the fields below for each procurement which has been carried out with a value of over £500. All fields are mandatory and MCIS will not let you proceed until they are completed.

Title of contract and / or brief description of goods and / or services procured - This should be a clear and detailed description of the goods or services procured or the title of the contract if this provides sufficient information

Name of Contractor / Service provider – Please add the company name and contact details of the organisation providing the goods and / or service

Reference Number – Please include any unique internal reference number given to the procurement activity or in the case of OJEU procurements, the references which are automatically provided.

Date of Contract / Purchase - (dd/mm/yyyy) – This should be the date of the contract award or the date of purchase for the goods and / or service, in the correct format

Supplies, Services or Works? – Use the drop down box to select what category type you have procured.

Total Value of Contract (£, Net of VAT) – Add the total value of the contract you have procured net of VAT. Where the same supplier has been used for multiple procurements the aggregated value of the contract should be recorded here.

Procurement Method – Use the drop down box to select what procurement route you have followed. This will be either;

- eligible preferred supplier
- Formal tender
- Formal tender via supply2gov website – this can be tender via any web based procurement portal
- OJEU notice
- Single Tender Action
- Written quote
- Other – specified in description

If you select “Other – specified in description” you must ensure that you include a full description of the procurement process you followed. If the description is not sufficient the PDT may ask you to amend this.

Please refer to the procurement guidance to establish the most suitable selection for your procurements.

Once all of the relevant information for the record has been added click “update” and your record will be shown as below.

Claims Profile Offer Details History

Overview Assets Project Procurement A16

Project Procurement

This register lists details of each procurement exercise undertaken to deliver this project, all single purchases / contracts or single transactions over £500 must be included

Add New

Mode	Title of contract and / or brief description of goods and / or services procured	Name of Contractor / Service provider	Reference Number	Date of Contract / Purchase	Supplies, Services or Works?	Total Value of Contract (£, Net of VAT)	Procurement Method
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Materials for capital build	Bricks are us	2344123	24/10/2011	Supplies	10,000.00	Written Quote

Trusted sites 100%

5. Editing or deleting records

You will then have the option to either edit or delete that line. If you want to edit select “edit” and you will be taken back to the input screen. This should be done if you want to make any amendments to the record.

To delete the record completely select “delete”. The warning message below will appear and you should select your option.

Claims Profile Offer Details History

Overview Assets Project Procurement A16

Project Procurement

This register lists details of each procurement exercise undertaken to deliver this project, all single purchases / contracts or single transactions over £500 must be included

Add New

Mode	Title of contract and / or brief description of goods and / or services procured	Name of Contractor / Service provider	Reference Number	Date of Contract / Purchase	Supplies, Services or Works?	Total Value of Contract (£, Net of VAT)	Procurement Method
	Materials for capital build	Bricks are us	2344123	24/10/2011	Supplies	10,000.00	Written Quote

Message from webpage: Are you sure you want to delete the procurement?

OK Cancel

Done

Start, Inboxes - Microsoft Office, M C I S Project Pro..., Public Folders - Cog..., P:\, Document1 - Microsoft Word, 17:06 Monday

To add more records select “add new” and you will be taken back to the input screen at section 3.

Enhancing International Trade, North East - Regional Competitiveness and Employment Programme
Reference: NE006024 Status: Live

Other Public Sector
FoA2 - Yes

Claims Profile Offer Details History

Overview Assets Project Procurement A16

Project Procurement

This register lists details of each procurement exercise undertaken to deliver this project, all single purchases / contracts or single transactions over £500 must be included

Add New

Mode	Title of contract and / or brief description of goods and / or services procured	Name of Contractor / Service provider	Reference Number	Date of Contract / Purchase	Supplies, Services or Works?	Total Value of Contract (£, Net of VAT)	Procurement Method
	Materials for capital build	Bricks are us	2344123	24/10/2011	Supplies	10,000.00	Written Quote

Update Cancel

Supplies Eligible Preferred Supplier

(dd/mm/yyyy)

Done

Trusted sites, 100%

6. When can the procurement screen be updated?

As the screen is part of the project profile this can be updated at any point during the project lifetime. For all new projects this screen should be updated

MCIS Procurement Screen

Page 6 of 7

ERDF-WI-8-005

Version Number 1

Date Published 26.02.13

at the point that the project goes live on MCIS. At this point the grant recipient must record all procurements which have already taken place prior to the project starting and a list of any known procurements taking place in the future.

This screen should then be updated with each claims submission to include any procurement exercise which has taken place during the claims period.

For existing projects this screen should be updated prior to submission of your next claim to show any procurement that has taken place to date. If further procurements are then undertaken during a claim period the record must be updated each time a claim is submitted.

It is essential that this screen is completed with a full record of all procurement activity before your project comes to an end and payment of any retention monies will not be made until this is done.