Power to your procurement

Digital Outcomes & Specialists (DOS) 5

RM1043.7

Report Management Information User guidance

Customer guidance

Crown Commercial Service

Contents

Introduction

Management Information (MI) submissions are a record of business contracted to/or invoiced by suppliers on all Crown Commercial Services (CCS) commercial agreements.

All CCS suppliers need to complete MI submissions on a monthly basis for any agreements they are listed on as a supplier. Submissions are made using Report MI to CCS.

The following sections outline the process of how to report MI for the framework each month, why it is important and how to solve any problems you may be facing when doing so.

Section 1

When do I need to submit MI?

Your MI needs to be submitted every month. A task for this is created at midnight on the first of each calendar month. Once created, a task is required to be completed within five working days and will ask for your previous month's contract or spend information. Your MI contact will be emailed a reminder on the first of the month and will need to log in to action outstanding tasks in the system.

How do I log in?

You can log in through the Report Management Information (RMI) portal, your username is the email address any reminder/notification emails have been sent to so far. If you have not received any emails, please check your spam/junk.

If you haven't received any notifications you may not have an account set up, and should contact us for support using the support email address given below.

When your account is set up, you can self-serve to access the system for the first time, using the below steps:

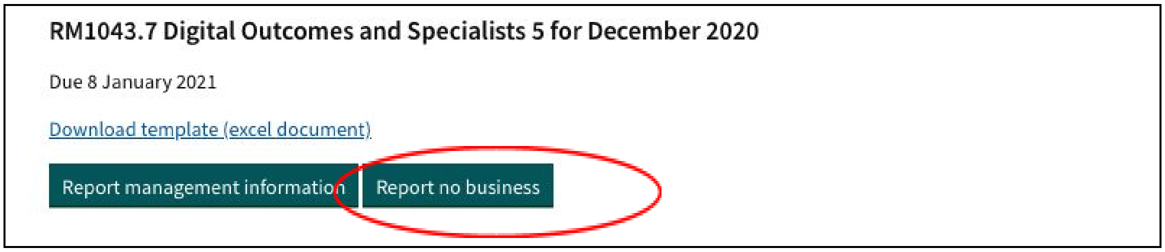
1. Go to: https://www.reportmi.crowncommercial.gov.uk/
2. Click: "Sign in", links at the top or bottom of the page
3. Click: "Don't remember your password?"
4. Enter your email address
5. Click: "send email"
6. Follow the instructions in the reset email you receive- this will come from a third party service called Auth0. If you don't receive this, check your spam or junk folders.

If you have any difficulty logging in, please get in touch with us for further assistance: report-mi@crowncommercial.gov.uk

Do I need to provide an MI report if I have not done any business on DOS this month?

Yes, it is a contractual obligation to provide MI on your organisation's activity on CCS agreements each month, even if you haven't done any business on the agreements.

If you haven't done any business on your agreement this month, login to the [RMI portal](), select the "Report no business" button against the relevant task, and confirm the submission:



I have done business on DOS this month, how do I submit a completed template file?

You can declare business conducted on a CCS agreement by selecting the "Report management information" button against the relevant task:

You can declare business conducted on a CCS agreement by selecting the "Report management information" button against the relevant task:

Report management information

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Upload a file

Choose a file to upload

Accepted file types are Microsoft Excel (.xls or .xlsx).

You'll be able to review a summary of the files before you submit.

Choose file No file chosen

Add a purchase order number

You have the option of adding a purchase order number to this return, which will appear on your invoice.

Purchase order number

This field is optional.

Upload and check file

The content of the file will be validated by the system, once this has completed you will be taken to a review screen, where you will need to check the value of the submission and finalise this:

Review & submit

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Your file has been checked and is ready to submit.

File Test Supplier RM1043.7 Dec20.xls

Submitted	Rows	Total
Invoices	1	£42,936.75
Contracts	0	£0.00
Others	0	

Submit management information

If any of this management information looks incorrect, check the data in your spreadsheet and start again.

Once finalised, the submission is marked as complete and will no longer be displayed in your task list.

Section 2

How do I get a blank MI template?

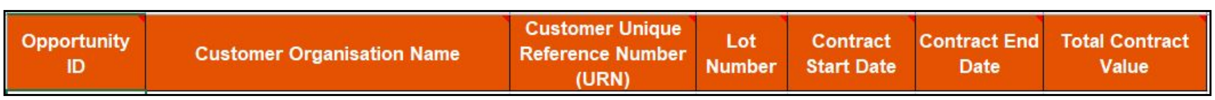
You can download a blank MI template for each outstanding task, by selecting the ‘download template’ immediately below the task:

How do I change the MI contact for my organisation?

If you need to update your MI contact details, company name or add/remove/edit additional MI contacts, contact report-mi@crowncommercial.gov.uk and provide your supplier organisation name, email address, and the details of your request.

How do I complete the MI Template Contracts Tab

Once you have won business through DOS 5, please report the contract details to us in the next reporting window. You only need to complete the contract tab once per contract and do not need to repeat this when corresponding invoices are reported.



Opportunity ID	Customer Organisation Name	Customer Unique Reference Number (URN)	Lot Number	Contract Start Date	Contract End Date	Total Contract Value

The table below explains what you need to enter for each field:

Field Name	**Description**
Opportunity ID	The number found on the end of the URL for the opportunity on the Digital Marketplace for example: www.digitalmarketplace.service.gov.uk/digital-outcomes-and-specialists/opportunities/**13619** Please report all corresponding invoices with the same opportunity ID, this will allow us to see the full audit trail.
Customer Organisation Name	The name of the customers organisation.

Customer Unique Reference Number (URN)	The 8 digit URN which identifies Public Sector Customers who buy products/services through CCS. Details on how to find this can be found in Section 3 of this document.
Lot Number	The Lot the contract was awarded under: ● Lot 1: Outcomes ● Lot 2: Specialists ● Lot 3: User Research Studios ● Lot 4: User Research Participants
Contract Start Date	The date the contract is due to start.
Contract End Date	The date the contract is due to end.
Total Contract Value	The total value of the contract.

How do I complete the Invoices Raised Tab

Please report any invoices raised from a contract awarded through DOS 5 the month after you have raised the invoice. For example if you raised an invoice on 01 September 2021 please report this in the task generated at the beginning of October 2021.

Opportunity ID	Customer Organisation Name	Customer Unique Reference Number (URN)	Customer Invoice/Credit Note Date	Customer Invoice/Credit Note Number	Lot Number	Service Provided	Unit of Measure	Quantity	Price per Unit	Total Cost (ex VAT)

The table below explains what you need to enter for each field:

Field Name	**Description**
Opportunity ID	The number found on the end of the URL for the opportunity on the Digital Marketplace for example: www.digitalmarketplace.service.gov.uk/digital-outcomes-and-specialists/opportunities/**13619** Please report all corresponding invoices with the same opportunity ID, this will allow us to see the full audit trail.
Customer Organisation Name	The name of the customers organisation.
Customer Unique Reference Number (URN)	The 8 digit URN which identifies Public Sector Customers who buy products/services through CCS. Details on how to find this can be found in Section 3 of this document.

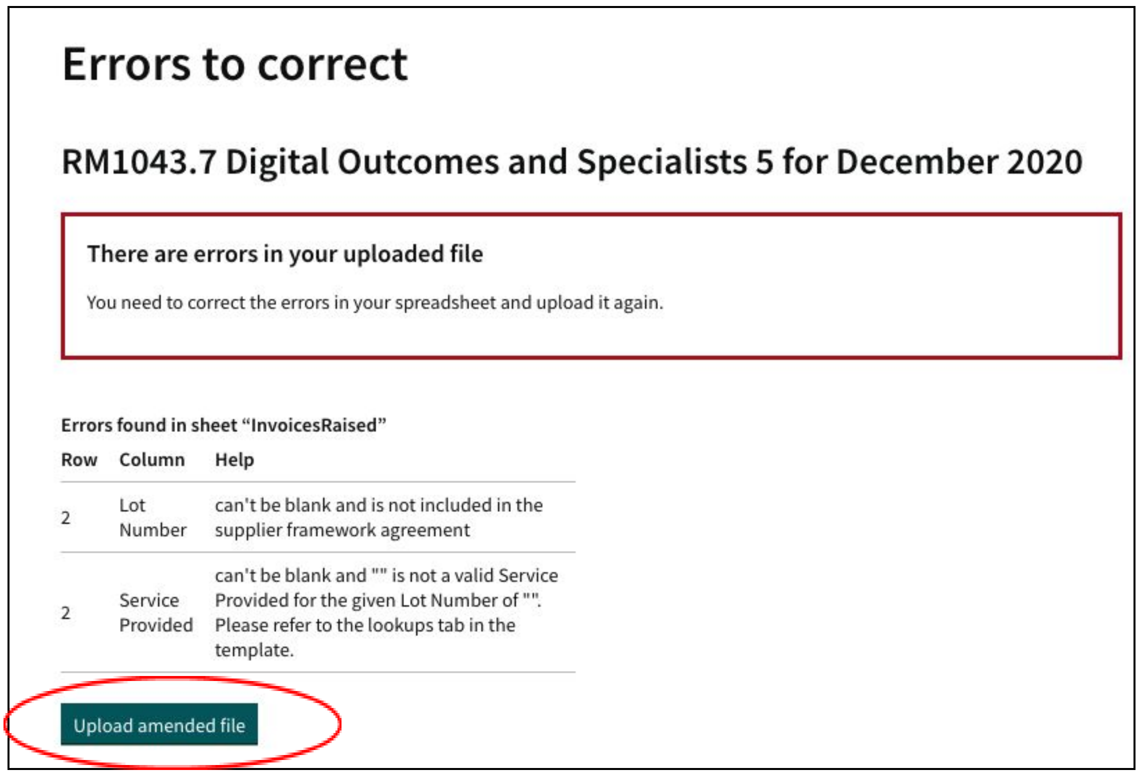
Customer Invoice/Credit Note Date	The date of the invoice/credit note.
Customer Invoice/Credit Note Number	The number for the invoice/credit note.
Lot Number	The Lot the contract was awarded under: ● Lot 1: Outcomes ● Lot 2: Specialists ● Lot 3: User Research Studios ● Lot 4: User Research Participants
Service Provided	Select the service you provided from the drop down list. The list of available services depends on the lot selected on each line item.
Unit of Measure	Select the unit of measure for the service being invoiced from the drop down list.
Quantity	The total quantity of units purchased for the service being invoiced. Quantity x Price Per Unit = Total Cost (ex VAT) For credit notes the Quantity should be entered as a negative number.
Price per Unit	The price paid per unit of purchase for the service being invoiced. Quantity x Price Per Unit = Total Cost (ex VAT) For credit notes the price per unit should still be entered as a **positive** number.
Total Cost (ex VAT)	The total amount (£) being invoiced for this service line item (ex VAT). Quantity x Price Per Unit = Total Cost (ex VAT) For credit notes the Total Cost should be entered as a **negative** number.

Section 3 - FAQs

My MI submission has failed the validation process and contains errors, what do I do?

If your MI submission has failed to pass validation checks, you will be notified of the “Errors to correct”. These errors will need to be addressed and amended within your MI submission before you can resubmit the updated submission for validation.

The image below provides an example of what you might see if there is an error within your submission. The information in the row and column sections indicate where the error can be found. While the help section provides information about why the content in that cell has not passed validation checks.



Validation failures are most commonly as a result of one or more of the following:

- A mandatory field has been left blank
- Data has been entered in the wrong format (for example entering text in a numeric field).
- Data entered is the wrong length (for example, a 30 character address has been entered into a postcode field, which has a limit of 8 characters).
- Data has been entered which does not match the criteria of the supplier organisations placed on the agreement (for example, data has been entered against framework lot 2, when the company submitting the data has only won a place on framework lots 1 and 3).
- Data has been entered which does not match a predefined list. (for example, a customer URN has been entered which is not recognised).

If you are certain that you are using the correct template file and ingest process is still failing, contact report-mi@crowncommercial.gov.uk for support; provide your company name, the agreement name, the task date, the nature of the error, and the template file that you are trying to load.

I can't see the tasks for an agreement that I need to report on.
Tasks for upcoming submissions are generated at midnight, UTC, on the first of each month. You will not be able to make a submission in advance of the task creation process.

If your organisation has more than one MI contact, check the return history, using the "history" button at the top of the screen, to see if another contact may have already completed the task(s).

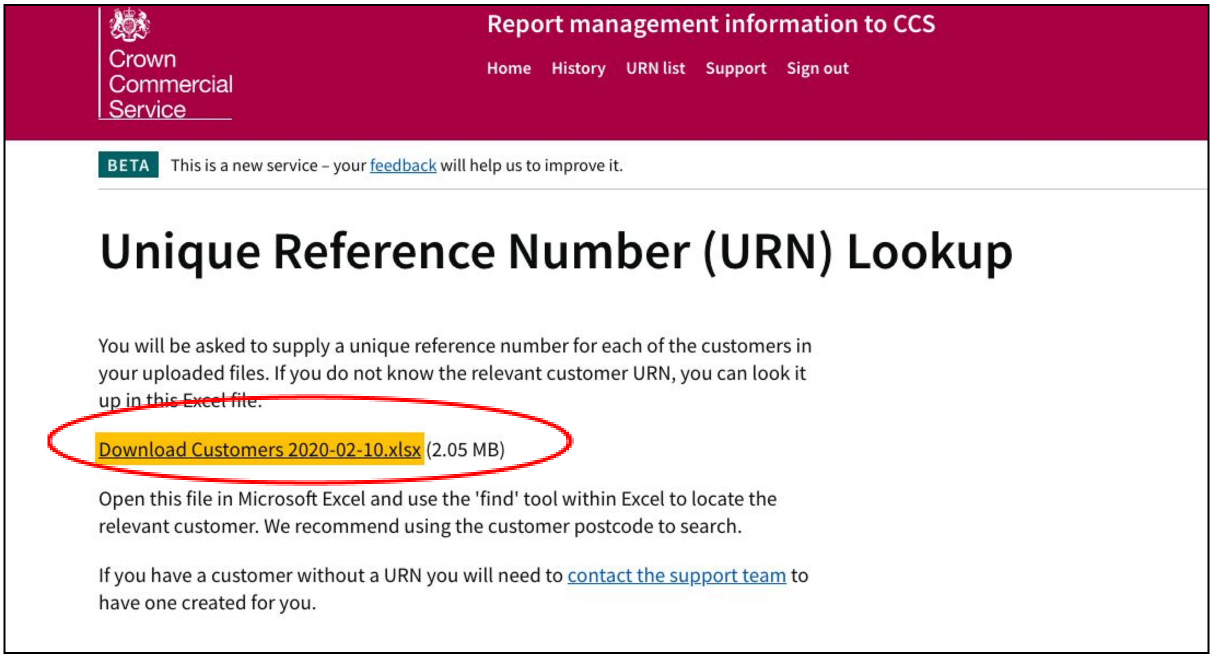
If you are certain that tasks should be displayed but are not there when you log in, contact report-mi@crowncommercial.gov.uk for assistance. Please provide your name, the email address you use to log into your account, your company name, the agreement(s) you were expecting to see tasks for and a description of the issue.

I don't know what to put in some of the columns on the template.
Each template file has orange coloured tabs which indicate where data is to be provided. If you scroll-over the column headers, tooltips will appear providing additional information about the requirements for each field. Some fields may have acceptable responses restricted to particular format types, such as numbers or dates, which is indicated at the bottom of the tooltips.

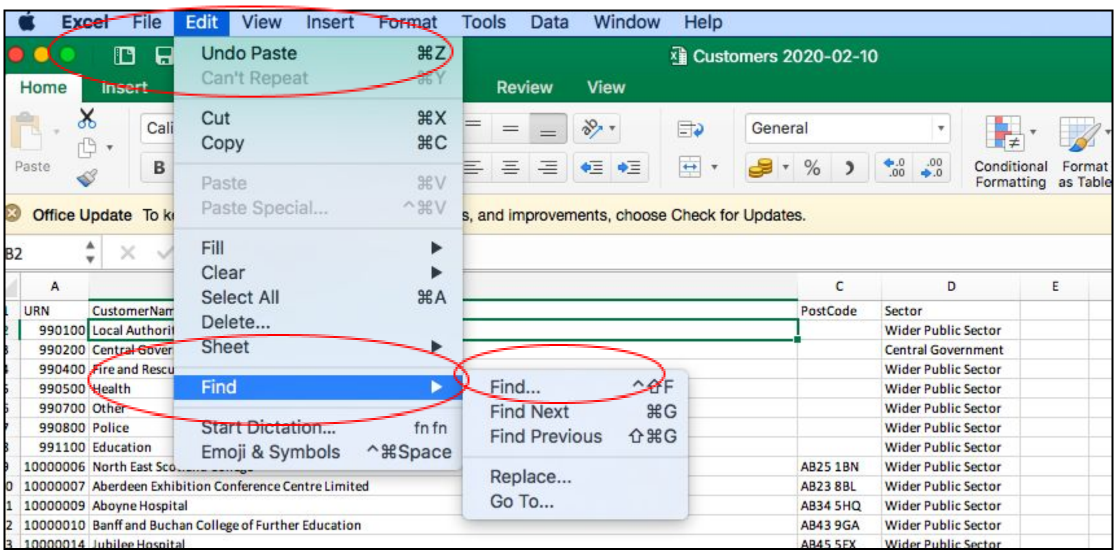
In addition, some fields have built in drop-down boxes, in order to ensure particular pieces of data are reported consistently by all suppliers on the agreement. If you automating the population of the template or creating a data export from your own internal system(s), a product or service table and a lookups tab (coloured red and black respectively) is provided in the template to assist you in automating lookups for these fields.

How do I find my customer URN(s)?
Public Sector Customers who buy products/services through CCS agreements are identified by a unique 8 digit integer – a Unique Reference Number (URN).

You can download a copy of the current URN list from the CCS Supplier Guidance Web Page, or from the Report MI system by selecting the URN List button from the top of the page.



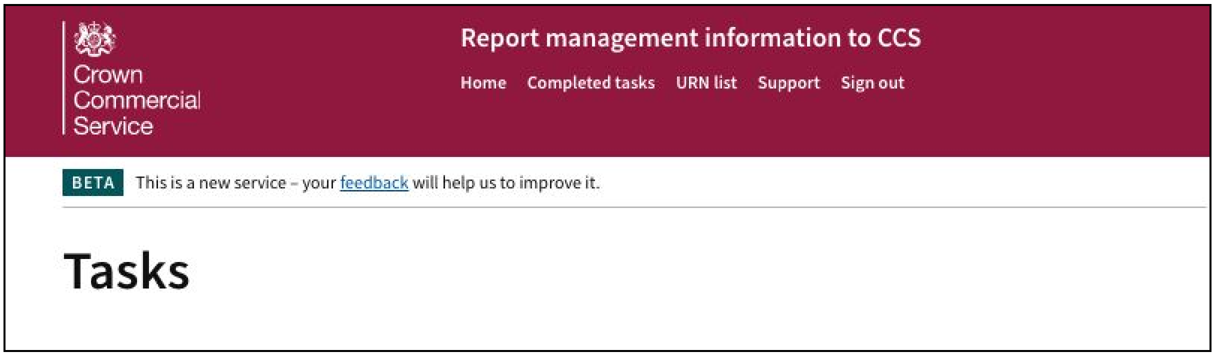
You will need to download the customer list each month as new customers will regularly be added to the list. Once you have downloaded the list follow the instruction as shown below to ‘find’ the new customer you need:



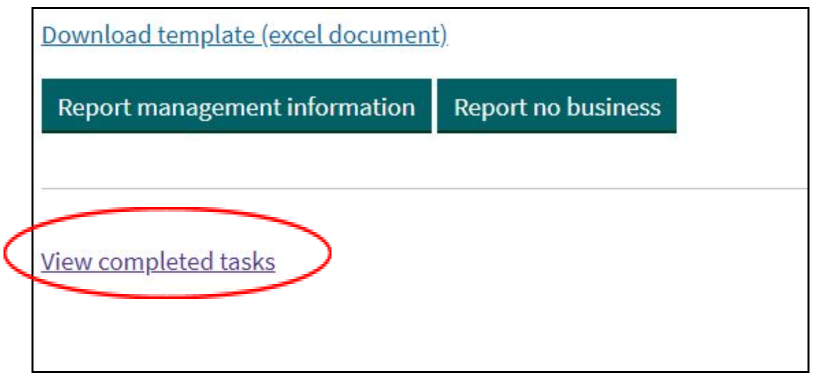
Once you’ve found the customer copy and paste the URN back into your MI Template form as required.

Generally, customers are listed using their full name, rather than abbreviations. For example, “Ministry of Justice”, instead of “MOJ”. If you believe one of your customers doesn’t have a URN, contact Report-mi@crowncommercial.gov.uk for support.

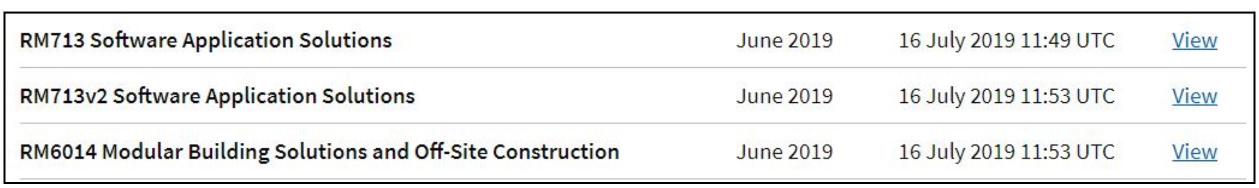
How can I see my historic submissions?
Your completed submission history is available by selecting the “Completed tasks” button at the top of the Report MI portal:



Alternatively, you can select “View completed tasks” at the bottom of your task list:

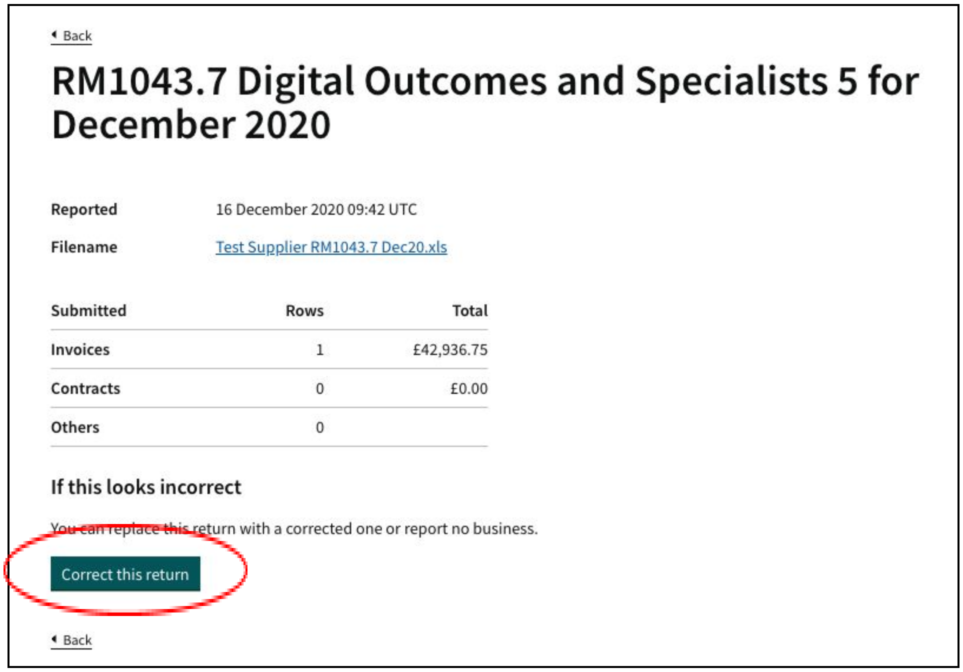


From this list, you can view further details about an individual submission, including the value and a copy of the file that was originally loaded, by selecting the “View” button, next to the task:

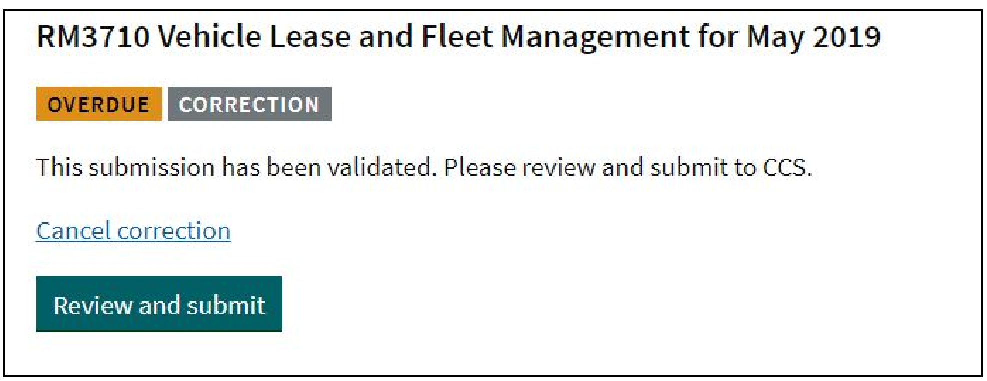


RM713 Software Application Solutions	June 2019	16 July 2019 11:49 UTC	View
RM713v2 Software Application Solutions	June 2019	16 July 2019 11:53 UTC	View
RM6014 Modular Building Solutions and Off-Site Construction	June 2019	16 July 2019 11:53 UTC	View

I have made a mistake on a Historic submission. How can I correct this?
As per the instructions above, locate the incorrect return in your history and select “View”.
At the bottom of the task summary page, there is an option to correct the submission:



Select this option, and you will be asked to load a corrected template file. Alternatively, you can declare no business for the selected submission if needed. If you have a correction in progress, but have navigated away, the detail will be shown in the task list for when you return:



Further information

If you require any further information please contact

info@crowncommercial.gov.uk 0345 410 222

You can also learn more about Crown Commercial Service at:

Website:	Twitter:	LinkedIn:
crowncommercial.gov.uk	@gov_procurement	Crown Commercial Service