

Central Repository

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1 Central Repository

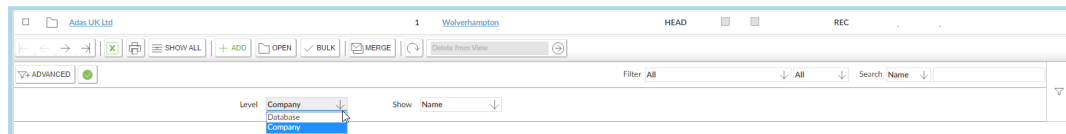
At the heart of COINS is the Central Repository. This has been designed specifically for the Construction Industry and provides a central location for static data and is shared by the primary business processes. It provides users with the information relating to companies, their offices and the projects. It has been designed to automatically update when events occur from other business processes.

The Central Repository uses the System Administrator module and can be configured to run with the operational modules such as Financials and Procurement.

2.1 Views

There are different views within COINS relating to the CIW. This can be used to restrict the User Views to specific levels; up to four levels are available.

In the example below, we have two levels, i.e. Database and Company level. The Company level in this case is an office or branch.

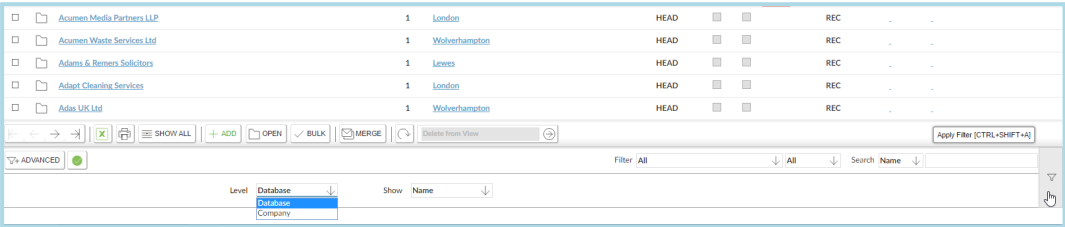


All records are held at the database level and therefore need to be located and selected by adding the record to your view. Without adding the record to your view you will not be able to place any orders for that supplier.

By maintaining your list, you can only use and list the local suppliers that you will use and therefore not have the additional list of subcontractors and plant hire companies.

2.1.1 Adding a Record to a View

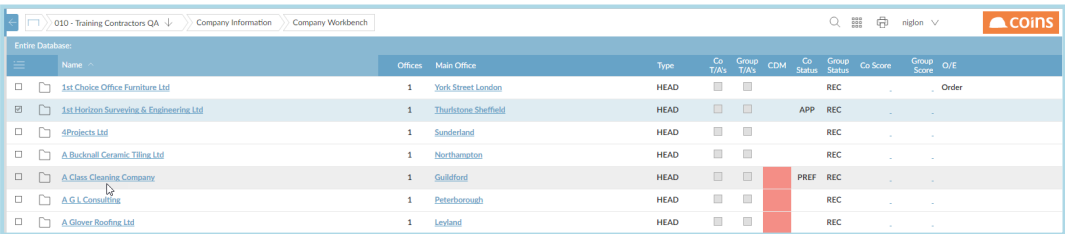
On the Companies Workbench, select the Database option from the drop-down list in the Level field and click the Apply Filter button.



You must apply the filter to enable the list to change to the database level.

You can also select an additional filter to display just the suppliers if required, or use the Name search field to reduce the list.

Locate the Supplier required and select the Tick Box adjacent to the record. This will highlight the record. (You can select a number of records by using the Ctrl key or the Shift key).



Select the Add to View option from the Action drop-down list and select the Apply Action button.

010 - Training Contractors QA Company Information Company Workbench

coins

Entire Database:

Name	Offices	Main Office	Type	Co. TABs	Group TABs	CDM	Co. Status	Group Status	Co. Score	Group Score	O/E
1st Choice Office Furniture Ltd	1	York Street London	HEAD					REC	-	-	Order
1st Horizon Surveying & Engineering Ltd	1	Thurstone Sheffield	HEAD				APP	REC	-	-	
4Projects Ltd	1	Sunderland	HEAD					REC	-	-	
A Bucknall Ceramic Tiling Ltd	1	Northampton	HEAD					REC	-	-	
A Class Cleaning Company	1	Guildford	HEAD				PREF	REC	-	-	
A G L Consulting	1	Peterborough	HEAD					REC	-	-	
A Glover Roofing Ltd	1	Levland	HEAD					REC	-	-	
A Plant Hire	1	Maldenhead	HEAD				PREF	REC	-	-	Order
A&H Demolition Services	1	Slough	HEAD					REC	-	-	Order
A1 Skip Hire Ltd	1	Accrington	HEAD					REC	-	-	
A1 Supa Skip Ltd	1	Lancaster	HEAD					REC	-	-	
AA Projects	1	Manchester	HEAD					REC	-	-	
AAC Flags	1	Irvine	HEAD					REC	-	-	
Abacus Design & Fabrication Ltd	1	Tyne & Wear	HEAD					REC	-	-	
Abacus Direct	1	Harrogate	HEAD					REC	-	-	
Abacus Solicitors	1	Manchester	HEAD					REC	-	-	
Abbeey Glass	1	Sheffield	HEAD				APP	APP	-	-	Order
Abi Paint Supplies	1	Brisbane	HEAD					APP	-	-	
Absolute Invoice Finance Limited	1	Manchester	HEAD					REC	-	-	
Absolute Invoicing Financial Limited	1	Maldstone	HEAD					REC	-	-	

ADVANCED

SHOW ALL

ADD

OPEN

BULK

MERGE

ADD TO VIEW

PRINT COMPANY TYPE: BACS FORM

APPLY ACTION

Filter: All

Search: Name

Level Database

Show Name

The supplier will be added to your view. (It will not remove the record from the Database list)

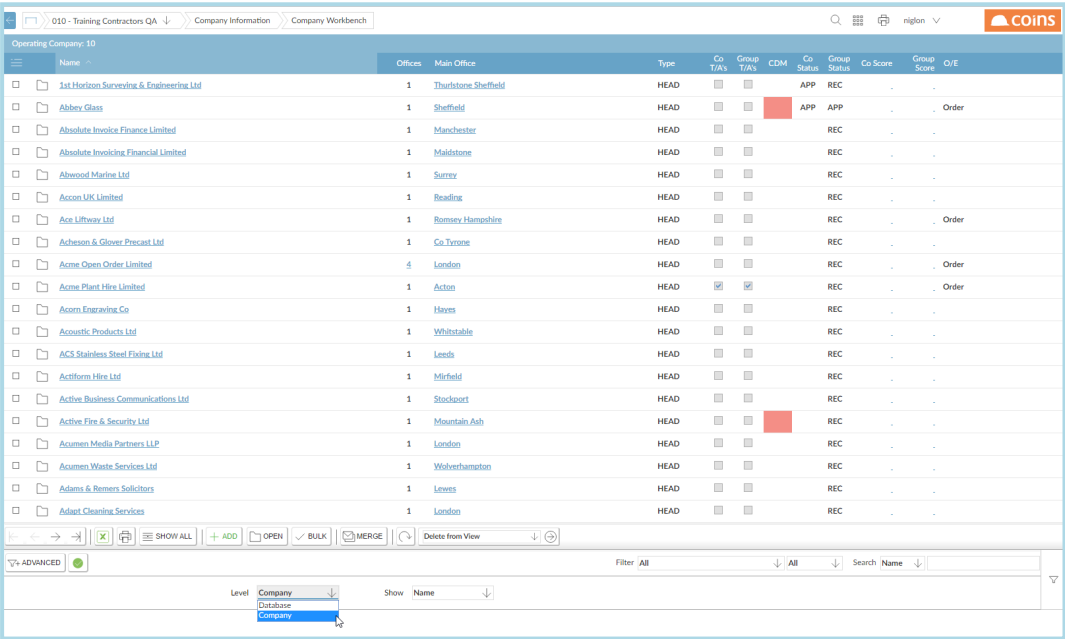
You should regularly maintain the views in the Company Information Workbench to keep the records that you require.

2.1.2 Deleting a Record from a View

To keep your list current and have only the records that you need you should maintain the list regularly. The easiest way to remove a supplier that you no longer use is to delete the record from your view.

This will not delete the record within the system. It will only remove it from your view. It will still be available in the Database.

On the Companies Workbench, select the view that you wish to maintain (any level below Database) from the drop-down list in the Level field and click Apply Filter.



The screenshot shows the COINS Companies Workbench interface. At the top, there are tabs for '010 - Training Contractors QA', 'Company Information', and 'Company Workbench'. Below the tabs is a table with columns: Name, Offices, Main Office, Type, Co. T/A's, Group T/A's, CDM, Co. Status, Group Status, Co. Score, Group Score, and O/E. The table lists various companies, including '1st Horizon Surveying & Engineering Ltd', 'Abbey Glass', 'Absolute Invoice Finance Limited', 'Absolute Invoicing Financial Limited', 'Abwood Marine Ltd', 'Accom UK Limited', 'Ace Liftway Ltd', 'Acheson & Glover Precast Ltd', 'Acme Open Order Limited', 'Acme Plant Hire Limited', 'Acorn Engraving Co', 'Acoustic Products Ltd', 'ACS Stainless Steel Fixing Ltd', 'Actiform Hire Ltd', 'Active Business Communications Ltd', 'Active Fire & Security Ltd', 'Acumen Media Partners LLP', 'Acumen Waste Services Ltd', 'Adams & Remers Solicitors', and 'Adapt Cleaning Services'. Below the table, there is a toolbar with buttons for 'SHOW ALL', '+ ADD', 'OPEN', 'BULK', 'MERGE', and 'Delete from View'. At the bottom, there is a 'Level' dropdown menu with options 'Company', 'Database', and 'Company'. The 'Company' option is selected, and the 'Show' dropdown menu is also visible.

Locate the record that you wish to remove from your view.

Select the Tick Box adjacent to the record you require. This will highlight the record. (You can select a number of records by using the Ctrl key or the Shift key).

Select the Delete from View option from the dropdown list and select the Apply Action button.



010 - Training Contractors QA Company Information Company Workbench

Operating Company: 10

Name	Offices	Main Office	Type	Co T/A	Group T/A	CDM	Co Status	Group Status	Co Score	Group Score	O/E
<input type="checkbox"/> 1st Horizon Surveying & Engineering Ltd	1	Thurstone Sheffield	HEAD	<input type="checkbox"/>	<input type="checkbox"/>		APP	REC	-	-	
<input type="checkbox"/> Abbey Glass	1	Sheffield	HEAD	<input type="checkbox"/>	<input type="checkbox"/>		APP	APP	-	-	Order
<input checked="" type="checkbox"/> Absolute Invoice Finance Limited	1	Manchester	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Absolute Invoicing Financial Limited	1	Maldstone	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Abwood Marine Ltd	1	Surrey	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Acorn UK Limited	1	Reading	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Ace Liftway Ltd	1	Romsey Hampshire	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	Order
<input type="checkbox"/> Acheson & Glover Precast Ltd	1	Co Tyrone	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Acme Open Order Limited	4	London	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	Order
<input type="checkbox"/> Acme Plant Hire Limited	1	Acton	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			REC	-	-	Order
<input type="checkbox"/> Acorn Engraving Co	1	Hayes	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Acoustic Products Ltd	1	Whitstable	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> ACS Stainless Steel Fixing Ltd	1	Leeds	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Actiform Hire Ltd	1	Mirfield	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Active Business Communications Ltd	1	Stockport	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Active Fire & Security Ltd	1	Mountain Ash	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Acumen Media Partners LLP	1	London	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Acumen Waste Services Ltd	1	Wolverhampton	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Adams & Remers Solicitors	1	Lewes	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	
<input type="checkbox"/> Adapt Cleaning Services	1	London	HEAD	<input type="checkbox"/>	<input type="checkbox"/>			REC	-	-	

ADVANCED

SHOW ALL

ADD

OPEN

BULK

MERGE

Delete from View

Print Company Type/BACS Form

Apply Action

Filter: All

Search: Name

Level: Company

Show: Name

The record will be removed from the view. (It will not remove the record from the Database list).



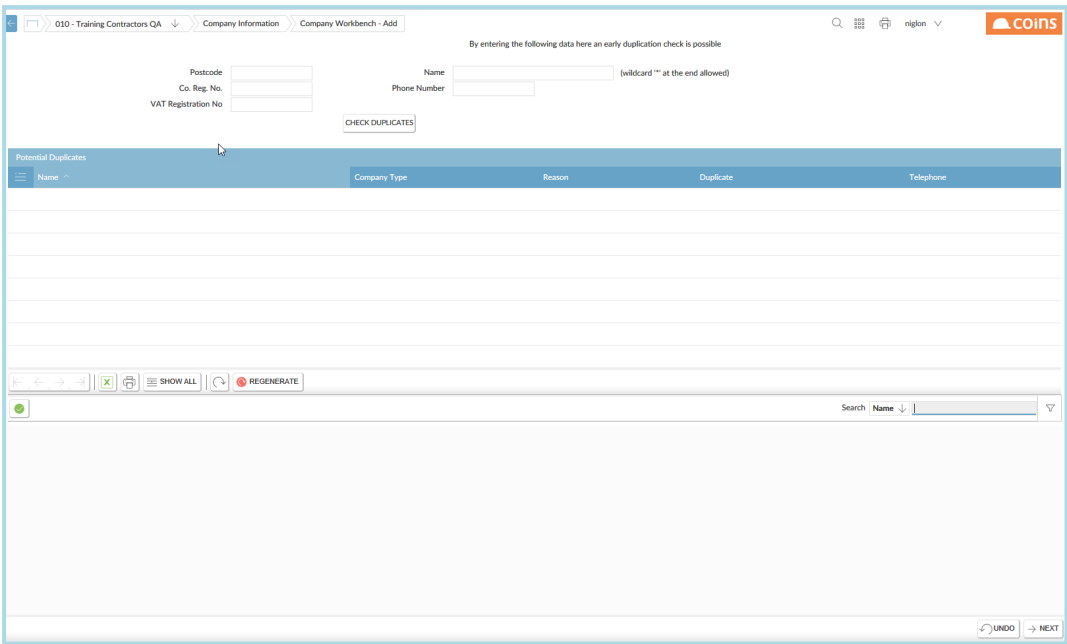
2.2 Overview

The Company Information Workbench is a database of all the companies you deal with; for example: suppliers, subcontractors, clients, architects, solicitors, and so on. The Company Information Workbench is "global" - that is, it is not restricted to a single COINS company (kco). You should only have one record in the Company Information Workbench for each company you deal with.

This explains how to add a new Supplier to the Central Repository.

The Central Repository can be separated into up to five levels of view, from Database/Group (Level 1), down to Region, or even Office level (Level 5 being the lowest level). Users are set up with a base view, between levels 2-5. A user will have access to go up levels, to view larger subsets of the Central Repository. When adding a new Supplier, it will be added to your base view as well as the levels above it. For example for a level 3 user (for example, Regional view), the new Supplier will be added to level 3, and also to level 2 (Company) and level 1 (Group/Database).

A Company should only be recorded in the Company Information Workbench once, although it is possible to have many offices linked to the company as required. For example, Jewson has a head office and many branch/offices around the UK.



In the top panel, enter the details of the account to be added. You may search on the following criteria:

Field	Description
Postcode	Enter a postcode to check whether the company you want to add has already been recorded in COINS.
Name	Enter a Name to check whether the company you want to add has already been recorded in COINS. Entered Name will be compared with the Company Name, Short Name and Legal Name of the companies in the database.
Co. Reg. No.	Enter a registration number to check whether the company you want to add has already been recorded in COINS.
Phone Number	Enter a Phone Number to check whether the company you want to add has already been recorded in COINS.
VAT Registration No	Enter a VAT registration number to check whether the company you want to add has already been recorded in COINS.

Once you have entered the details you wish to search on, click CHECK DUPLICATES.

The Potential Duplicates section shows a list of companies that have the same postcode, company registration number, VAT Registration Number, phone number or company name as you entered. If the company you want to add is shown here, click the hyper-link to update the details.

010 - Training Contractors QA

Company Information

Company Workbench - Add

By entering the following data here an early duplication check is possible

Postcode

Co. Reg. No.

VAT Registration No

Name Abbey

Phone Number

(wildcard "*" at the end allowed)

CHECK DUPLICATES

Potential Duplicates

Name	Company Type	Reason	Duplicate	Telephone
<input type="checkbox"/> Abbey Glass	Subcontractor	Short Name	Abbey	01642 887766

←

→

↺

↻

SHOW ALL

REGENERATE

Search Name

UNDO

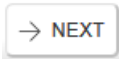
NEXT

If the company is not shown, click

→ NEXT

 to add a new one.

2.4 Creating a New Company

Once the Duplicates Check has been carried out and no duplicates found, clicking  on the duplicates check screen will allow you to add the new company details.

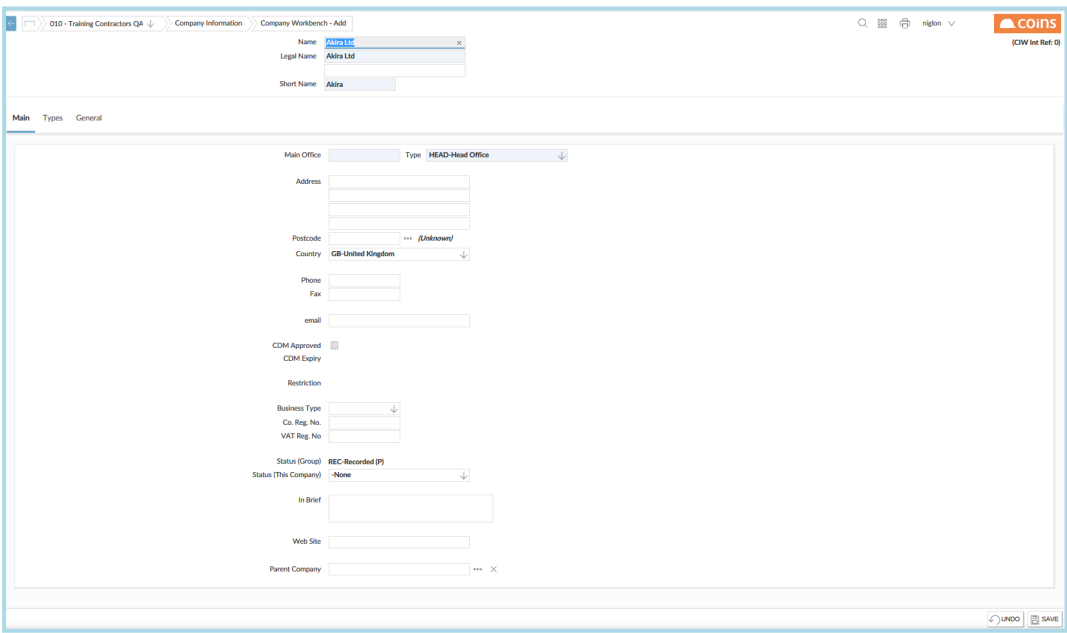
2.4.1 Header

The Header panel is at the top of the screen and will be static regardless of which tab you are viewing. This will have all the details relating to the name of the company.



Field	Description
Name	The name of the Supplier
Legal	The legal name of the supplier, which is registered at Companies House
Short Name	The short name that will identify the Supplier on some enquiries and reports

2.4.2 Main Tab



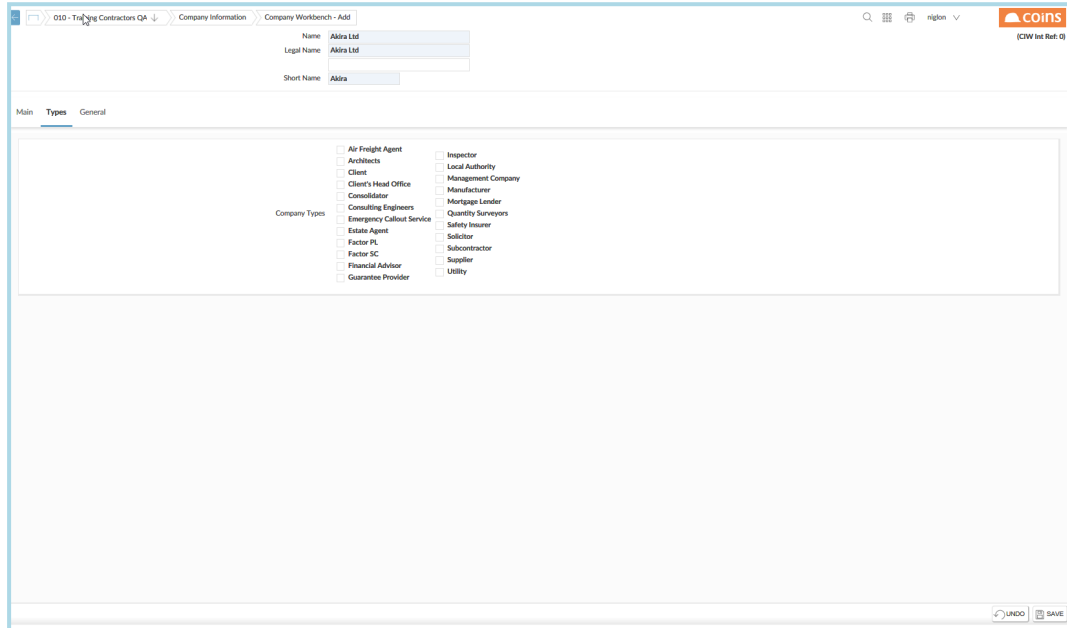
The Main tab shows the information regarding the details of the supplier such as the address, contact details, the office type and the status.

Fields	Description
Main Office	The location of the office, i.e. The Post Code Location
Type	The type of office (Head, Branch, Regional.....)

Fields	Description
Address Post Code Country	Four lines of address, a valid postcode and the Country
Phone Fax Email	General contact details for the suppliers office. Contact detail of individuals at this supplier may be added later.
Restriction	A message will be displayed here if this supplier has a restriction placed against them. When adding a supplier for the first time, this will be blank.
Business Type	What type of business is this supplier (Sole Trader, Partnership.....)
Company Reg. No.	If you have selected a business type above, this field will be mandatory and should be the number allocated to this supplier by Companies House.
VAT reg. No.	If the company is VAT Registered, enter their number here. This will be used when completing VAT returns
Status	Select the appropriate option that your company wants to allocate to this Supplier
In Brief	Brief details about the supplier may be entered here, such as the materials they supply or specific services offered to your company.
Website	The URL to the Suppliers Website
Parent Company	If this supplier is a subsidiary of another supplier select the Parent company account here. The Parent company must already exist in your Company Information Workbench, it cannot be added here.

2.4.3 Types Tab

The Company Types is available to enable you to search on types of companies. Select the company types that are associated with the Supplier, as you can allocate more than one. For example the company could be a supplier (materials), subcontractors or plant hire.

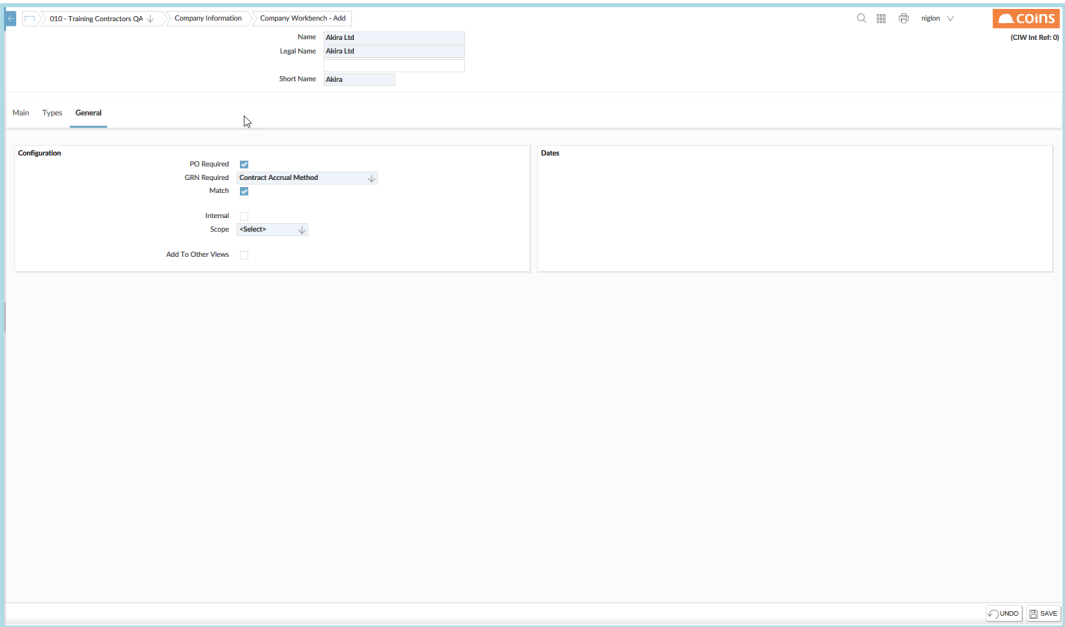


Select the Tick Box adjacent to all the required company types. A company must have at least one type, i.e. supplier.

If you select the Save button without selecting a company type, a message is displayed stating "You must select a Company Type". Select the OK button. You will return to the Company Add screen. Select the Types Tabs to allocate the company types.

2.4.4 General Tab

The General tab enables more general information to be entered about the company. It relates to how the purchase orders are going to be processed, are GRN's required and other additional information.



Select the General tab and enter the additional information in the relevant fields.

Field	Description
PO Required	Do you require Purchase Orders? If this is selected, you MUST enter a valid PO number when entering invoices for this Company
GRN Required	Whether you want to process Goods Received Notes for the main office. By default COINS uses the setting on the contract, but you can override it here (for example, you would not expect to process GRNs for a telephone supplier).
Match	Whether COINS runs detailed Purchase Order Matching on invoices from the main office. Typically you would only NOT run Purchase Order matching for "internal" plant suppliers
Internal	Is this an Internal company?
Add To Other Views	COINS will automatically add information on this company to the views above your base level. If you want COINS to add the information to your views in other modules and operating companies as well, tick this box.



When all the information has been entered click . You will return to the Company Information Workbench. The Company is added to the list with the relevant drill downs.



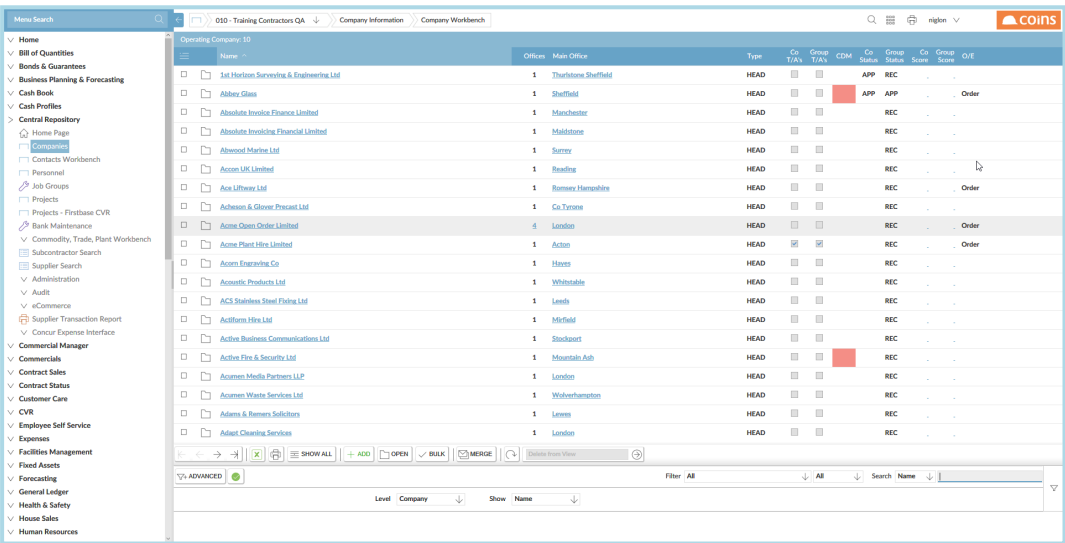
The company will now be available to the Financial Ledgers to create the appropriate trading accounts in COINS (Subject to the Types selected on the Types Tab).

2.5 Adding Offices to a Company

Companies can have many offices using the One to Many ratio, i.e. only one record for the Company and many office records.

You should not have the same company entered in the system more than once and therefore each office becomes an additional record against the main company record. It is on the office that the order is placed rather than the head office, so we recommend that you have all the offices entered into the system.

When adding an office, you will need to locate the company on the Company Information Workbench.



Name	Offices	Main Office	Type	Co T/A's	Group T/A's	CDM	Co Status	Group Status	Co Score	Group Score	O/E
3rd Horizon Services & Engineering Ltd	1	Thurstone Sheffield	HEAD				APP	REC	-	-	
Albany Glass	1	Sheffield	HEAD				APP	APP	-	-	Order
Absolute Invoice Finance Limited	1	Manchester	HEAD				REC	-	-	-	
Absolute Invoice Financial Limited	1	Maldenstone	HEAD				REC	-	-	-	
Alwood Marine Ltd	1	Sumner	HEAD				REC	-	-	-	
Ascom UK Limited	1	Reading	HEAD				REC	-	-	-	
Ace Liftway Ltd	1	Burnley Hampshire	HEAD				REC	-	-	-	Order
Adhansen & Glover Precast Ltd	1	Co Turnham	HEAD				REC	-	-	-	
Ascom Open Order Limited	6	London	HEAD				REC	-	-	-	Order
Ascom Plant Hire Limited	1	Acton	HEAD				REC	-	-	-	Order
Ascom Engineering Co	1	Mares	HEAD				REC	-	-	-	
Ascom Products Ltd	1	Whitstable	HEAD				REC	-	-	-	
ACS Stainless Steel Fittings Ltd	1	Leeds	HEAD				REC	-	-	-	
Actiform Lites Ltd	1	Midfield	HEAD				REC	-	-	-	
Active Business Communications Ltd	1	Stockport	HEAD				REC	-	-	-	
Active Fit & Security Ltd	1	Mountain Ash	HEAD				REC	-	-	-	
Ascom Media Partners LLP	1	London	HEAD				REC	-	-	-	
Ascom Waste Services Ltd	1	Wokingham	HEAD				REC	-	-	-	
Adams & Rovers Solicitors	1	Levens	HEAD				REC	-	-	-	
Ascom Cleaning Services	1	London	HEAD				REC	-	-	-	

Using the Company Name hyper-link in the Name column drill down into the Company Summary screen. The Company Summary screen is displayed with various tabs for the information available.

010 - Training Contractors QA - Company Information - Company Summary

Company: Acme Open Order Limited

Company Offices Accounts Shared SC Insurance CDM Orders Performance Trading Agreements Bidding History Capabilities Other

Name: Acme Open Order Limited
Legal Name: Acme Open Order Limited
Short Name: Acme

CTW Int Ref: 26

Main Types General

Main Office: London Type: HEAD-Head Office

Address:

Postcode: N20 8HN (LONDON NDO)
Country: GB-United Kingdom

Phone:
Fax:
email:

CDM Approved: ☐
CDM Expiry:
Restriction:

Business Type: Company
Co. Reg. No.: 324567890
VAT Reg. No.:

Status (Group): REC-Recorded (P)
Status (This Company):

OPEN

NEXT

Select the Offices Tab to view a listing of offices relating to the company.

010 - Training Contractors QA - Company Information - Company Summary

Company: Acme Open Order Limited

Company Offices Accounts Shared SC Insurance CDM Orders Performance Trading Agreements Bidding History Capabilities Other

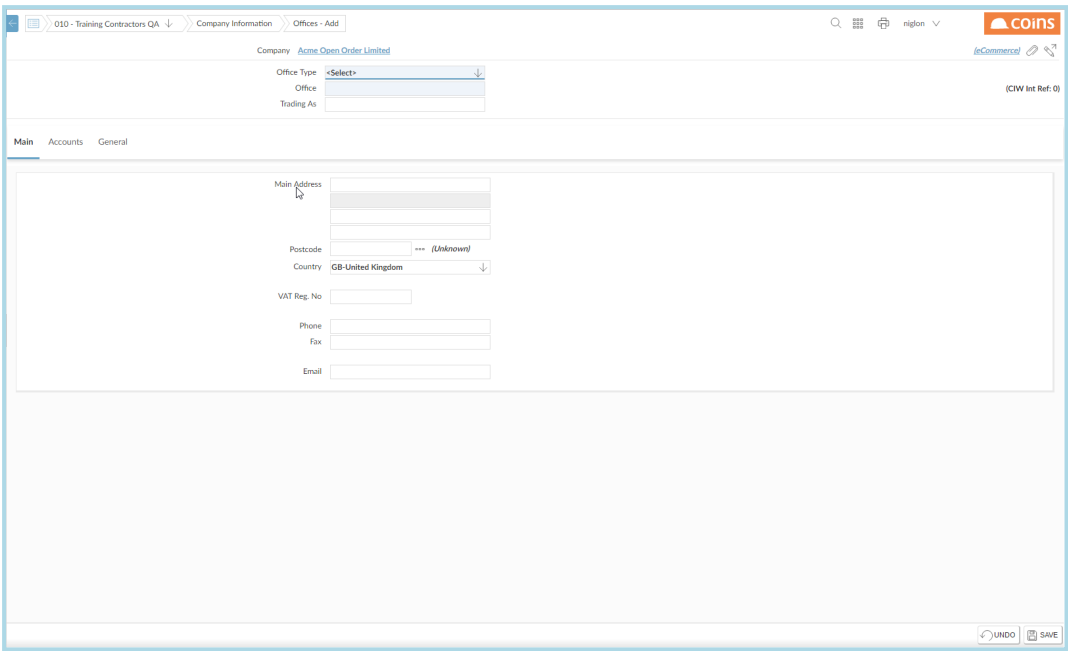
Office	Type	Telephone	Trading As	Co Status	Group Status	Co Score	Group Score	PL Account	SC Account	SL Account
<input type="checkbox"/> London	HEAD			REC				ACM001	ACM001	ACM001
<input type="checkbox"/> .	ECOMM			REC				acm001	ACM123	ACM123
<input type="checkbox"/> 2waymatch	ECOMM			REC				acm006	acm006	acm006
<input type="checkbox"/> 3waymatch	ECOMM			REC				acm004	acm004	acm004

SHOW ALL + ADD COPY OPEN BULK DETAIL Transfer Offices

Search: Office

NEXT

To create new offices click 



The Offices - Add screen is displayed to enter the details of the new office. The fields are grouped into different panels and tabs for grouping information together.

The Header record will display the Company name in the Company field and also if any documents are attached. This will be displayed constantly as you go through the tabs.

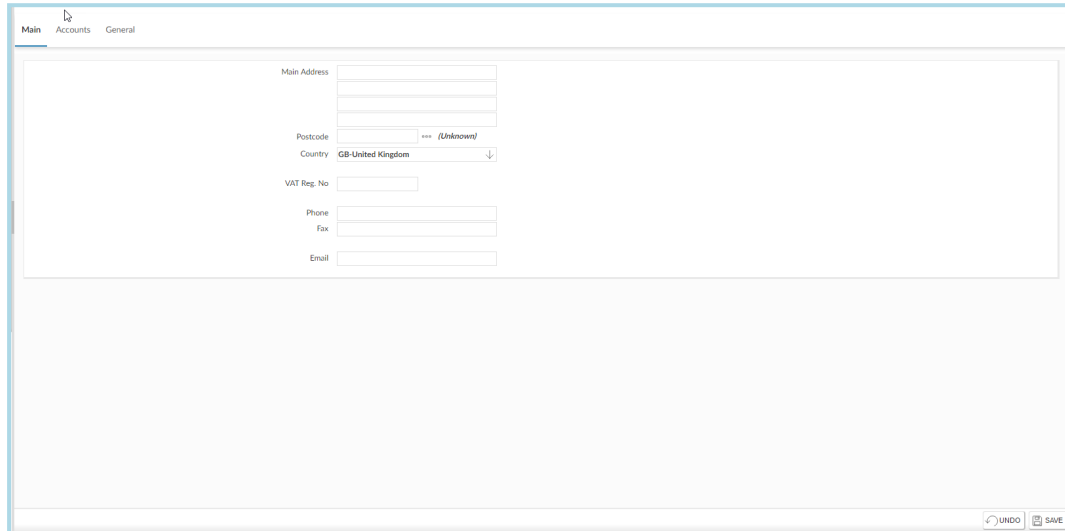


The Office name and type is displayed in a separate panel and will be also be available as you go through the tabs.



2.5.1 CIW Offices - Main Tab

The information in the Main tab is the general information regarding the office.



Fields	Description
Office Type	The type of office, i.e. Head Office, Branch, Regional
Office	The location of the office, i.e. the post code description
Trading As	The name under which this Office trades if different to the Header Company Name.
Main Address	There are 4 lines for the address.
Post Code	The valid Post Code
Country	The Country
VAT Reg. No	If the Office is VAT registered enter the number, if different to the main Company VAT Number.
Phone	The phone number of the Office (Switchboard)
Fax	The fax number of the Office (reception or office manager)
E-Mail	The general email of the Office (reception or office manager)

When all the information has been entered, select the Accounts Tab

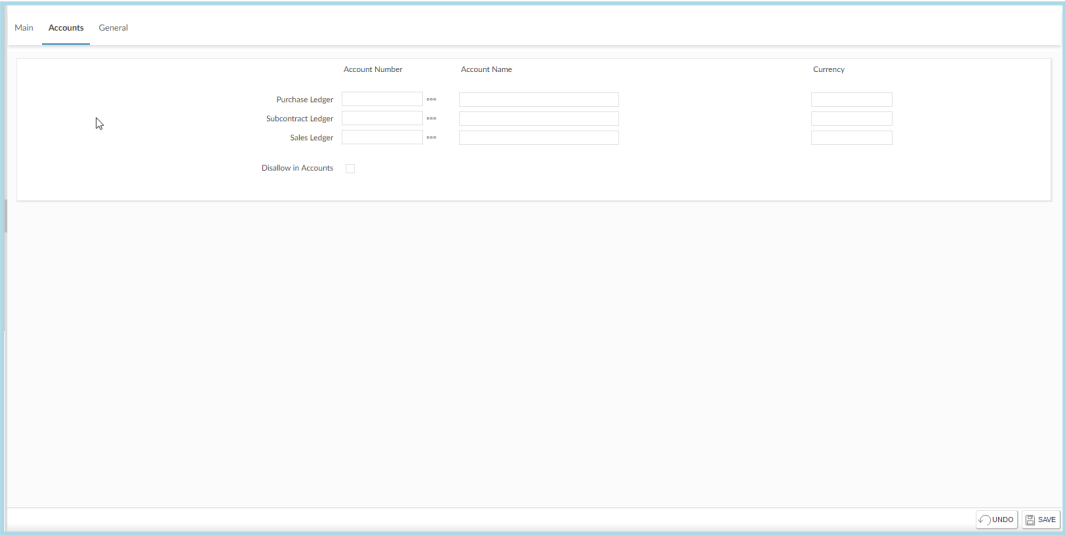
2.5.2 CIW Offices - Accounts Tab

Offices - Accounts Tab shows details of the ledger account numbers that have been assigned for this office.

These could either be manually allocated before the actual accounts are set up, or populated by COINS when a ledger account is created.

For the US only: You must use this screen to link Purchase Ledger (supplier) and/or Subcontract Ledger (subcontractor) account numbers to a company or office so that transactions can be related to a company when 1099 data is generated. For more information, see 1099 Processing.

You cannot place orders on the office if the account has not been assigned.

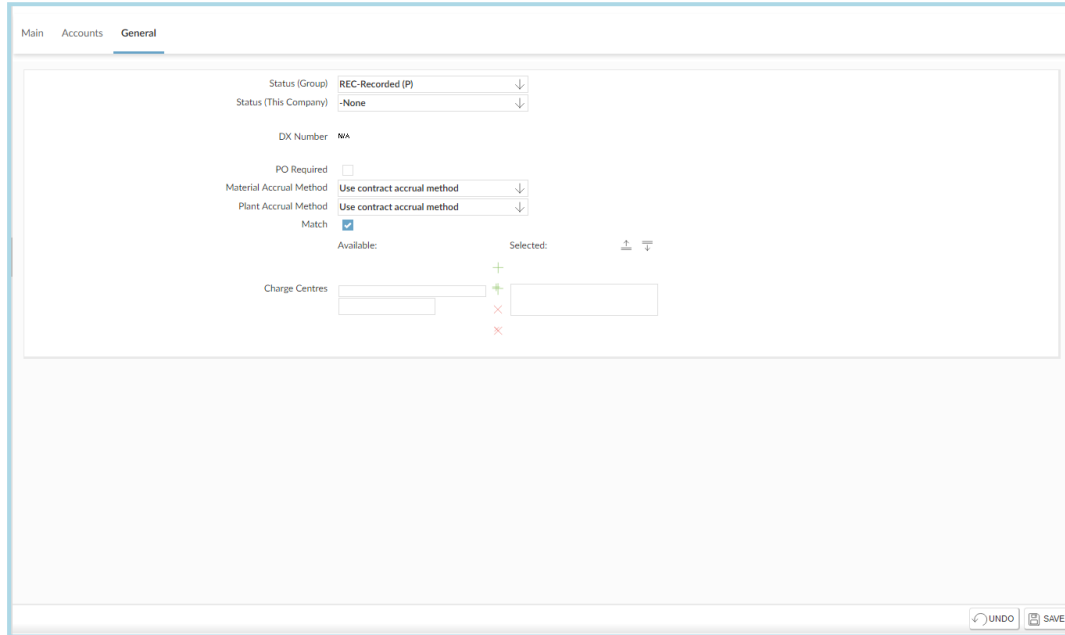


Field	Description
Account Number	The account numbers for this office in each of the ledgers.If you are not using auto-numbering (see Account Numbering Policy) you can pre-allocate the account numbers here, before creating the accounts in the ledgers. If the account number here is blank, COINS uses the account on the head office of this company, if one exists.
Account Name	The account names in each of the ledgers.
Currency	The currency specified for each of the accounts.
Disallow in Accounts	Whether to hide this office from the ledgers so that users cannot pull this through and create an account for it.


After completing this screen, select the **General** Tab.

2.5.3 CIW Offices - General Tab

The General tab enables more general information to be entered about the company. It relates to how the purchase orders are going to be processed, are GRN's required and other additional information. The information that is entered at the office level will override the information entered on the Company head office.



Field	Description
Status (Group)	Enter the status given to this group.
Status (This Company)	The status your company has given to this company.
DX Number	If appropriate, the DX (Document Exchange) number of the office.
PO Required	Is a Purchase Order number required when invoices from this office are entered? The default value (Y or N) for the PO Required field when setting up a new company.
Material Accrual Method	Whether you want to process GRNs for this office. Leave this field blank unless you want to override the contract-specific setting (for example, you would not expect to process GRNs for British Telecom).
Plant Accrual Method	How COINS calculates accruals on plant orders for this office. Full Allocation - Plant GRNs are required and weekly plant allocation is used. COINS creates the accrual from the confirmed plant sheet. No Allocation (GRN) - Plant GRNs and Plant Maintenance are used to record the on hire and off hire dates; COINS calculates the accrual based on the time between the on hire date (from the GRN) and the off hire date or today's date. No Allocation (no GRN) - Plant GRNs are not used; COINS calculates the accrual based on the time between the due date from outstanding orders and the off hire date or today's date. Use contract accrual method - COINS uses the default accrual method specified for the contract that the order is raised for.
Match	Whether COINS runs detailed Purchase Order Matching on invoices from this office. Typically you would only NOT run Purchase Order matching for "internal" plant suppliers.
Charge Centres	Office, Contact, Plant, Charge Centres

When all the information is entered click 

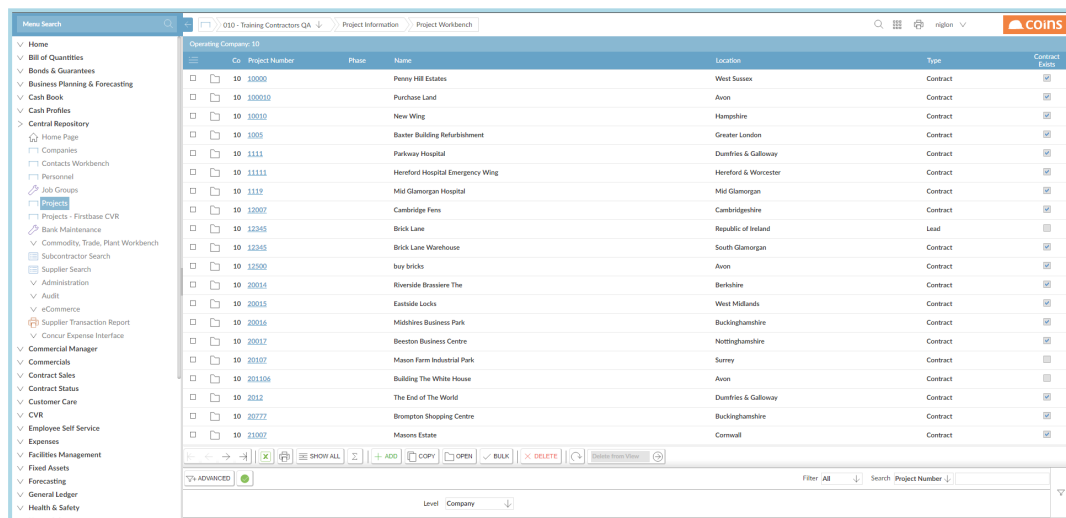
You will return to the Office tab and the additional office will be added to the list.

3 Project Information Workbench

When you identify an area of land, see a new development of office blocks, or hear about a potential motorway widening, these need to be recorded as potential Projects.

These are records that can be amended as you hear more information, arrange meetings or sell your services and pitch for the work.

The Project Workbench lists all the projects that you as a company have available, either as a potential, a current or a completed project.

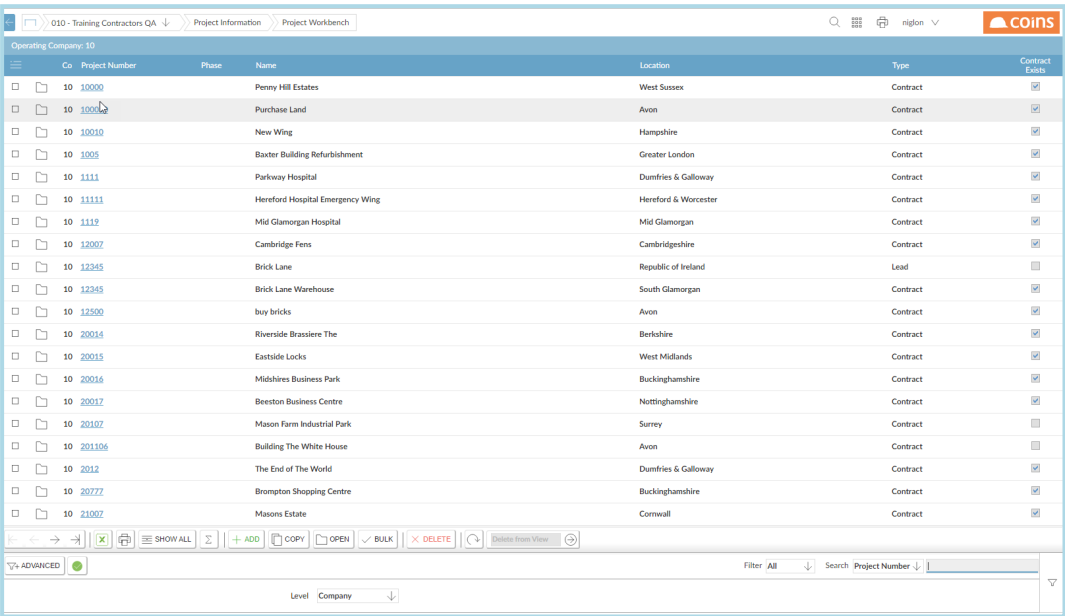


Co	Project Number	Phase	Name	Location	Type	Contract Exists
	100000		Penny Hill Estates	West Sussex	Contract	<input checked="" type="checkbox"/>
	100010		Purchase Land	Avon	Contract	<input checked="" type="checkbox"/>
	100010		New Wing	Hampshire	Contract	<input checked="" type="checkbox"/>
	1000		Baxter Building Refurbishment	Greater London	Contract	<input checked="" type="checkbox"/>
	1111		Parkway Hospital	Dumfries & Galloway	Contract	<input checked="" type="checkbox"/>
	1111		Hereford Hospital Emergency Wing	Hereford & Worcester	Contract	<input checked="" type="checkbox"/>
	1112		Mid Glamorgan Hospital	Mid Glamorgan	Contract	<input checked="" type="checkbox"/>
	12007		Cambridge Fern	Cambridgeshire	Contract	<input checked="" type="checkbox"/>
	12345		Brick Lane	Republic of Ireland	Lead	<input type="checkbox"/>
	12345		Brick Lane Warehouse	South Glamorgan	Contract	<input checked="" type="checkbox"/>
	12300		buy bricks	Avon	Contract	<input checked="" type="checkbox"/>
	20014		Riverside Brasserie The	Berkshire	Contract	<input checked="" type="checkbox"/>
	20015		Eastside Locks	West Midlands	Contract	<input checked="" type="checkbox"/>
	20016		Middles Business Park	Buckinghamshire	Contract	<input checked="" type="checkbox"/>
	20017		Becton Business Centre	Nottinghamshire	Contract	<input checked="" type="checkbox"/>
	20507		Mason Farm Industrial Park	Surrey	Contract	<input type="checkbox"/>
	201106		Building The White House	Avon	Contract	<input type="checkbox"/>
	2012		The End of The World	Dumfries & Galloway	Contract	<input checked="" type="checkbox"/>
	20777		Brompton Shopping Centre	Buckinghamshire	Contract	<input checked="" type="checkbox"/>
	21007		Masons Estate	Cornwall	Contract	<input checked="" type="checkbox"/>

Field	Description
Co	The company number.
Project Number	The lead number, tender number, or contract number of the project.This field links to: Project Summary
Phase	This is the phase of the project.
Name	The name of the project.
Location	The geographical location of the project.
Type	The type or status of the project (for example, "Lead", "Tender" or "Contract").
Contract Exists	Whether a contract exists in Contract Status for this project.

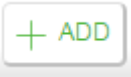
3.1 Adding a New Project

Navigate to Central Repository > Projects



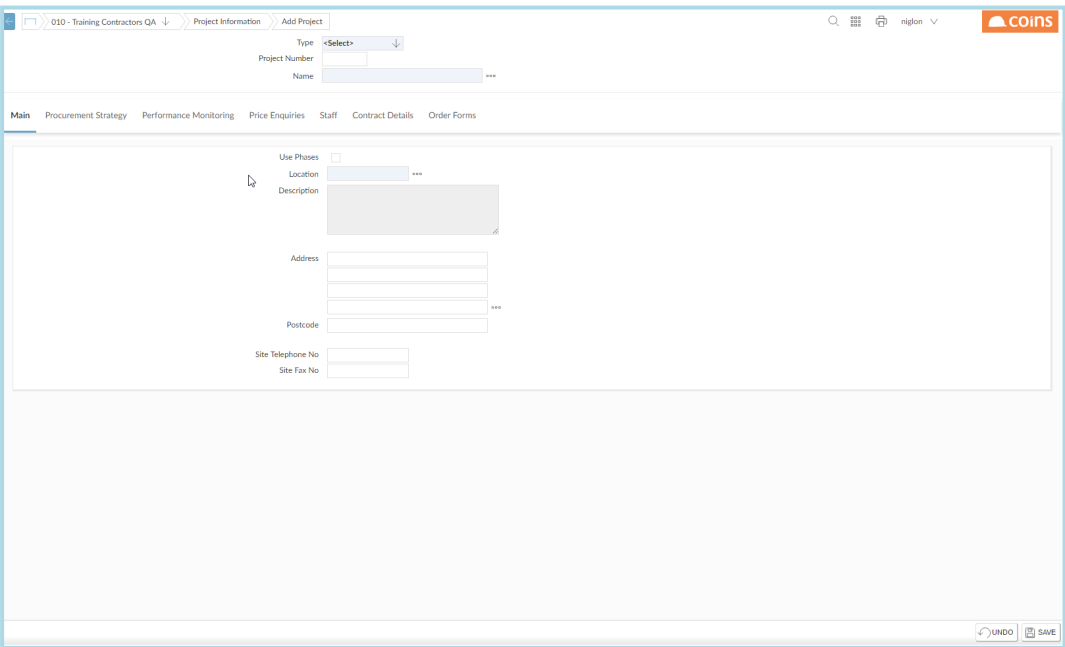
The screenshot shows the 'Project Workbench' table in the COINS system. The table lists various projects with columns for Co, Project Number, Phase, Name, Location, Type, and Contract Exists. The 'Contract Exists' column contains checkboxes. The table is filtered by 'Operating Company: 10'. The 'Project Number' column is highlighted, and the 'ADD' button is visible at the bottom right of the table.

Co	Project Number	Phase	Name	Location	Type	Contract Exists
10	10000		Penny Hill Estates	West Sussex	Contract	<input checked="" type="checkbox"/>
10	10001		Purchase Land	Avon	Contract	<input checked="" type="checkbox"/>
10	10010		New Wing	Hampshire	Contract	<input checked="" type="checkbox"/>
10	1005		Baxter Building Refurbishment	Greater London	Contract	<input checked="" type="checkbox"/>
10	1111		Parkway Hospital	Dumfries & Galloway	Contract	<input checked="" type="checkbox"/>
10	11111		Hereford Hospital Emergency Wing	Hereford & Worcester	Contract	<input checked="" type="checkbox"/>
10	1112		Mid Glamorgan Hospital	Mid Glamorgan	Contract	<input checked="" type="checkbox"/>
10	12007		Cambridge Fens	Cambridgeshire	Contract	<input checked="" type="checkbox"/>
10	12345		Brick Lane	Republic of Ireland	Lead	<input type="checkbox"/>
10	12345		Brick Lane Warehouse	South Glamorgan	Contract	<input checked="" type="checkbox"/>
10	12500		buy bricks	Avon	Contract	<input checked="" type="checkbox"/>
10	20014		Riverside Brasserie The	Berkshire	Contract	<input checked="" type="checkbox"/>
10	20015		Eastside Locks	West Midlands	Contract	<input checked="" type="checkbox"/>
10	20016		Midshires Business Park	Buckinghamshire	Contract	<input checked="" type="checkbox"/>
10	20017		Beeston Business Centre	Nottinghamshire	Contract	<input checked="" type="checkbox"/>
10	20102		Mason Farm Industrial Park	Surrey	Contract	<input type="checkbox"/>
10	20106		Building The White House	Avon	Contract	<input type="checkbox"/>
10	2012		The End of The World	Dumfries & Galloway	Contract	<input checked="" type="checkbox"/>
10	20777		Brompton Shopping Centre	Buckinghamshire	Contract	<input checked="" type="checkbox"/>
10	21007		Masons Estate	Cornwall	Contract	<input checked="" type="checkbox"/>



On the Project Information Workbench, click

The Add Project screen is displayed.



The screenshot shows the 'Add Project' screen in the COINS system. The screen has a header with 'Type' and 'Project Number' fields. Below the header, there are tabs for 'Main', 'Procurement Strategy', 'Performance Monitoring', 'Price Enquiries', 'Staff', 'Contract Details', and 'Order Forms'. The 'Main' tab is selected. The main area contains a form with fields for 'Use Phases', 'Location', 'Description', 'Address', 'Postcode', 'Site Telephone No', and 'Site Fax No'. The 'Address' field is highlighted. The 'SAVE' button is visible at the bottom right of the screen.

The coloured fields are mandatory and must be entered. The project header record will be displayed as you enter the information in the various tabs.



Enter the details of the project name in the relevant header fields.

Fields	Description
Type	The type of project, i.e. lead, contract
Project Number	The unique number allocated to the project, up to 8 characters
Name	The name of the project that you wish this to be known as

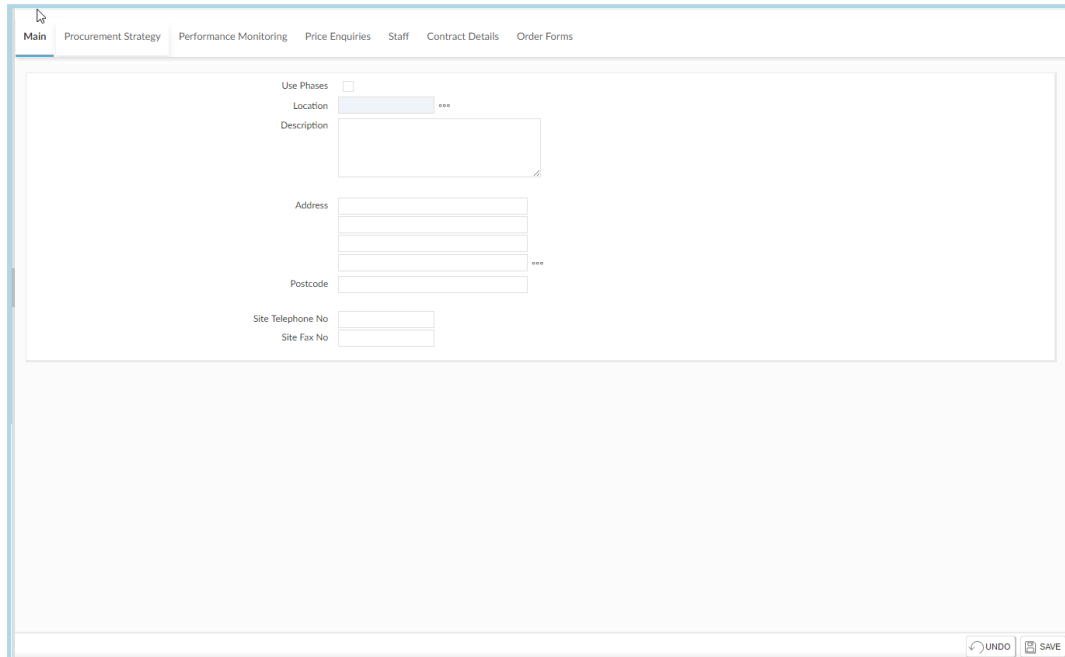
You could have a naming convention that would have the same number and a different letter as the project moves through the various stages before it gets to the contract level. Every company will have their own naming convention.

When all the details in the header record are entered we can now start to enter more information into the various tabs.

Select the Main tab to enter more information.

3.1.1 PIW - Main Tab

The Main tab will record the main details of the project as it moves through the various stages.

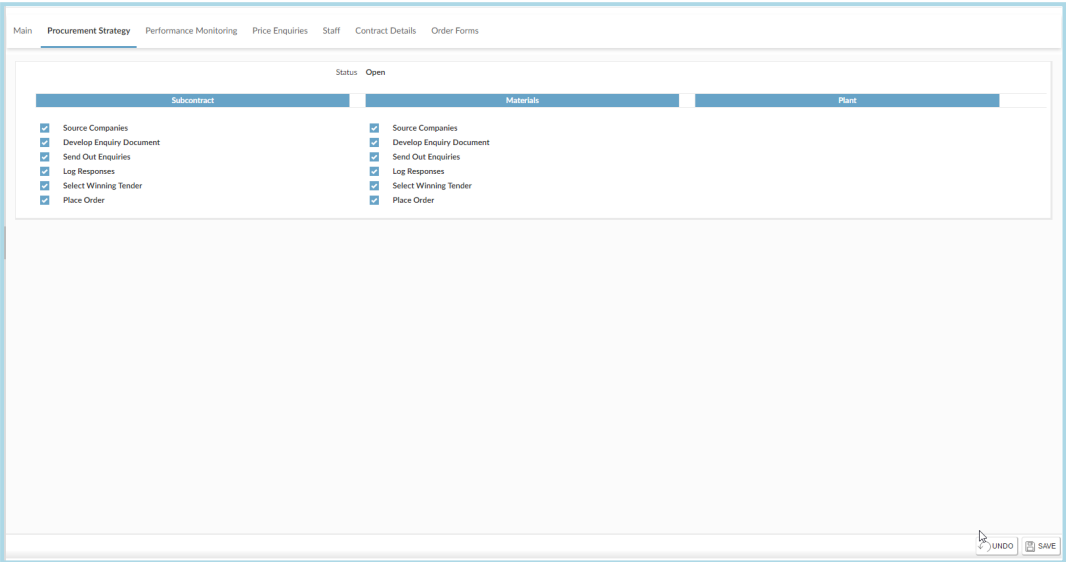


Fields	Description
Phases	Is the building work going to be monitor and have analysis in phases
Location	Enter the code for the geographical area in which the company works. A Lookup is available for this field.
Description	A brief description about the project and any other information
Address	The actual address of the project.
Post Code	The Post Code. This is used for the searches and locations etc.
Site Telephone Number	The telephone number of the site. This could also be used as the Show room site office if the project is for house building
Site Fax Number	The Fax number of the site.

When all the fields have been entered select the **Performance Monitoring** tab.

3.1.2 PIW - Procurement Strategy Tab

Procurement Strategy allows you to select which events to include on the procurement plan for each of the three areas (subcontract, material and plant).

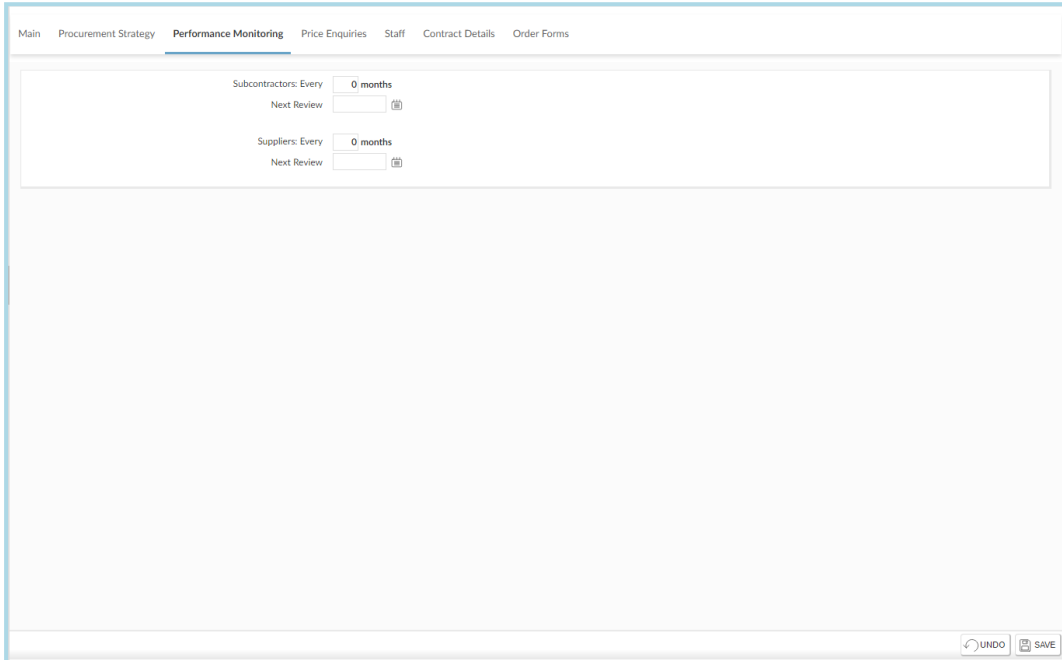


The events shown are set up on the default procurement plan. You can untick events that are not required on this project (unless they are marked [M], in which case they are mandatory).

Once you have selected your events, click the **Performance Monitoring** Tab.

3.1.3 PIW Procurment Monitoring Tab

The Performance Monitoring tab enables you set the schedules for monitoring the performance of the suppliers and the subcontractors.



You can add review information for the supplier every month if required, to ensure they are performing correctly to the efficiency of the project.

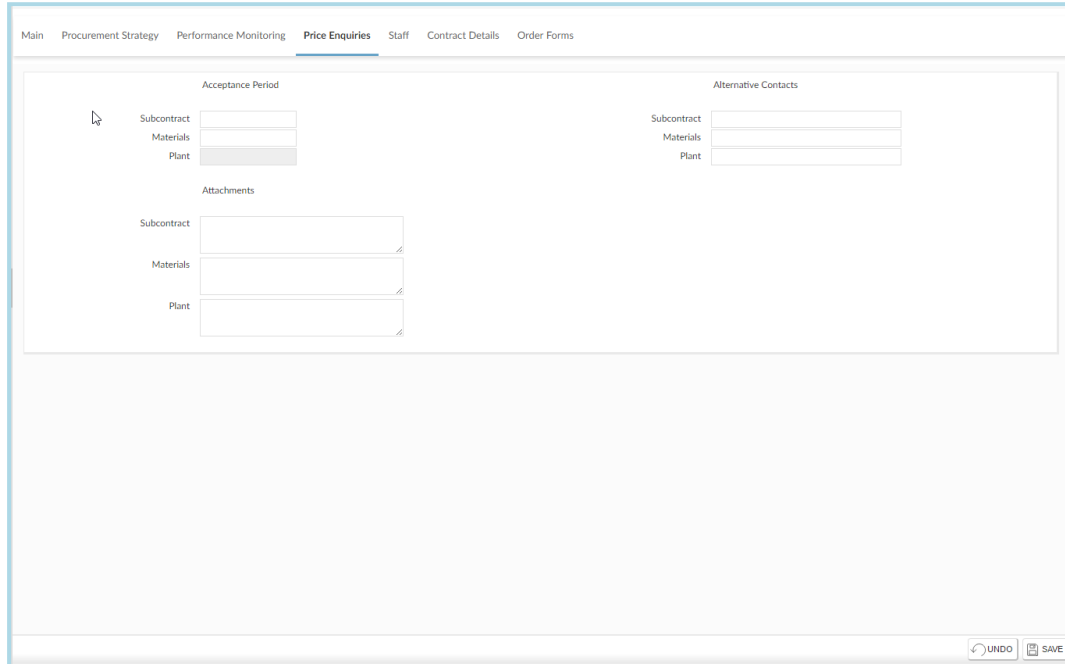
For example are they delivering within the set timeframe? Are their goods of excellent quality? The reviews are placed on the company information workbench, under the Score column.

Enter the details of the frequency and the review date in the relevant fields.

Click the **Price Enquiries** tab.

3.1.4 PIW Price Enquiries Tab

The Price Enquiries tab enables you to define information on the tenders that you send out to the Suppliers for the cost of the materials.

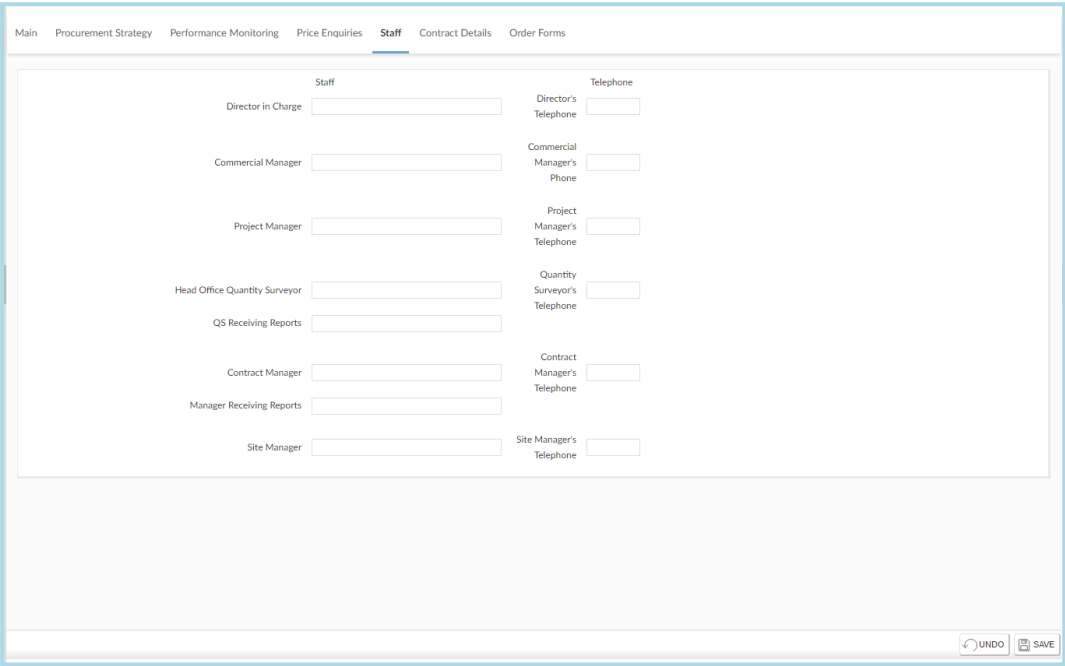


Field	Description
Acceptance Period	
Subcontract	The length of time that quoted prices should remain unchanged (e.g. "3 months").
Materials	The length of time that quoted prices should remain unchanged (e.g. "3 months").
Plant	The length of time that quoted prices should remain unchanged (e.g. "3 months").
Alternative Contacts	
Subcontract	The name of any alternative contact (other than yourself) on this project. You might use this if you are not always going to be in a position to respond quickly to price quotations.
Materials	The name of any alternative contact (other than yourself) on this project. You might use this if you are not always going to be in a position to respond quickly to price quotations.
Plant	The name of any alternative contact (other than yourself) on this project. You might use this if you are not always going to be in a position to respond quickly to price quotations.
Attachments	
Subcontract	Use these fields to draw attention to the fact that certain documents are always attached to price enquiries.
Materials	
Plant	

Enter the details in the relevant fields and select the **Staff** tab.

3.1.5 PIW Staff Tab

The Staff tab is used to record the details of which members of staff are working on the project.



The screenshot shows a web application interface with a navigation bar at the top containing the following tabs: Main, Procurement Strategy, Performance Monitoring, Price Enquiries, **Staff**, Contract Details, and Order Forms. The **Staff** tab is currently selected. Below the navigation bar, the form is divided into two columns: 'Staff' and 'Telephone'. The 'Staff' column contains the following labels and input fields: Director in Charge, Commercial Manager, Project Manager, Head Office Quantity Surveyor, QS Receiving Reports, Contract Manager, Manager Receiving Reports, and Site Manager. The 'Telephone' column contains the following labels and input fields: Director's Telephone, Commercial Manager's Phone, Project Manager's Telephone, Quantity Surveyor's Telephone, Contract Manager's Telephone, and Site Manager's Telephone. At the bottom right of the form, there are two buttons: 'UNDO' and 'SAVE'.

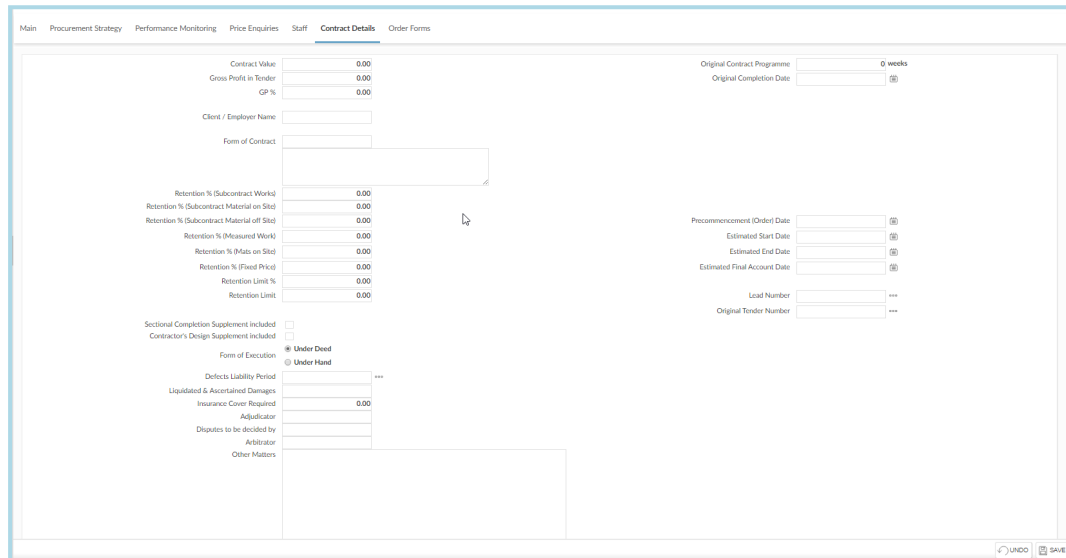
For each of the entries record the name of the person and a telephone contact number.

Once completed, click the **Contract Details** Tab.

3.1.6 PIW Contract Details Tab

Contract Details shows information about the contract; these fields are mainly to hold historic information about the contract or information that can be printed on orders (especially on subcontract orders).

All details entered here will be pulled through to the contract itself. All the information should be as accurate as possible. Details of estimated start date, length of time and value will be entered in the relevant fields.



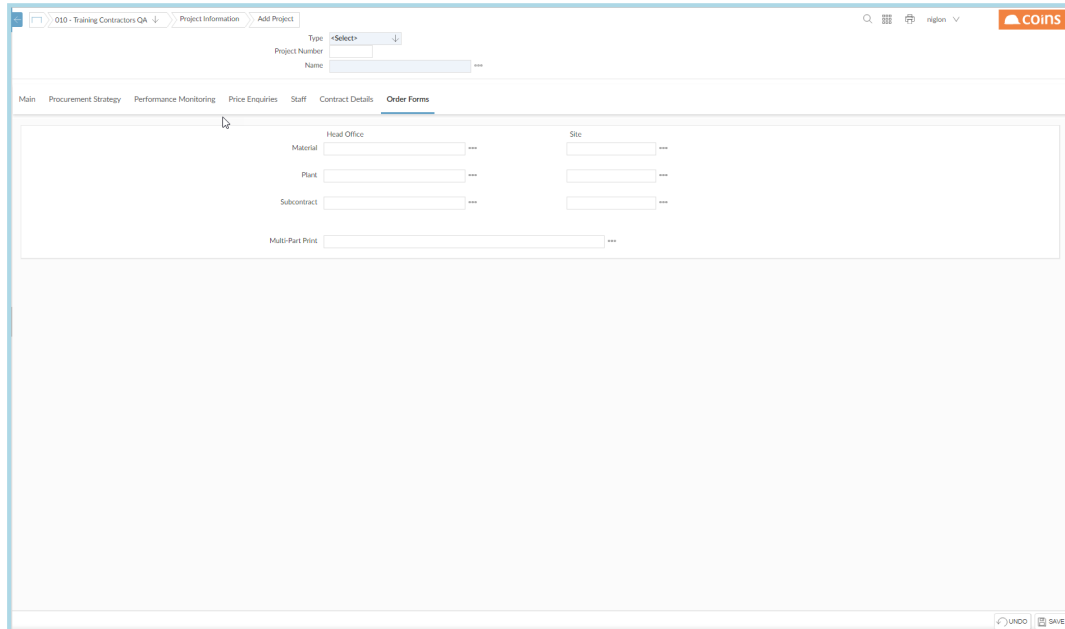
Field	Description
Contract Value	The original project value.
Original Contract Programme	The original planned duration of the work, in weeks.
Gross Profit in Tender	The original anticipated gross profit for the work.
Original Completion Date	The original anticipated completion date for the work.
GP %	The gross profit percentage amount.
Client / Employer Name	An alternative name if you want to show something different from the name on the certificate series.
Form of Contract	<p>The standard form of contract under which you have undertaken to do the work.</p> <p>The text box below the field allows you to enter any additional comments about the contract.</p>
Retention % (Subcontract Works)	The retention percentage for the subcontract.
Retention % (Subcontract Material on Site)	Material on site percentage on the project
Retention % (Subcontract Material off Site)	Material off site percentage on the project
Pre-commencement (Order) Date	The pre-commencement order date.
Retention % (Measured Work)	The retention percentage of the measured work.
Estimated Start Date	The start date of the contract.
Retention % (Mats on Site)	The retention percentage for materials on site.
Estimated End Date	The end date of the contract.

Field	Description
Retention % (Fixed Price)	The retention percentage for the contract.
Estimated Final Account Date	The date when the final amount payable under the contract is agreed by the client or client's representative.
Retention Limit %	The percentage of the retention limit.
Retention Limit	The amount of the retention limit.
Lead Number	The lead number of the project.
Original Tender Number	The tender number of the project.
Sectional Completion Supplement included	Whether a sectional completion supplement is included with the contract.
Contractor's Design Supplement included	Whether a contractor's design supplement is included with the contract.
Form of Execution	Whether the contract is executed "under hand" or "as a deed". A deed is a more formal type of document than a contract "under hand".
Defects Liability Period	The period between the date of Practical Completion and the date on the Certificate of Making Good Defects.
Liquidated & Ascertained Damages	Fixed damages stated in the building contract which the contractor must pay the employer (or which the employer may deduct from payments to the contractor) if completion is delayed beyond the contractual date for completion, as adjusted by any extensions of time.
Insurance Cover Required	The amount of insurance cover required.
Adjudicator	The name of the adjudicator.
Disputes to be decided by	The name of the person appointed to decide disputes.
Arbitrator	The name of the arbitrator.
Other Matters	Any additional notes about the contract.

Enter all the details in relevant field and select the **Order Forms** tab.

3.1.7 PIW Order Forms Tab

Order Forms allows you to specify alternative configurable documents to use when printing orders for this project. If you leave any of these fields blank, the corresponding default document will be used.



Select the forms required from the Lookup button. This also enables you to have different forms for any head office orders and site orders.

Once all the relevant information has been entered, amended or changed click



The Project record will be added to the Project workbench and the Project Summary screen is displayed.