Reference documents

While generating a tender, several documents may be consulted - for example, the quotations received from bidding suppliers, quality assurance documents, or prequalification documents. These documents, provided they are in electronic form, may be uploaded and conveniently stored so that they may be readily consulted.

Note: The ability of users to upload and download documents is covered by permissions. To set these permissions choose the **File > Edit users...** menu item, double-click on the desired user, and set their permissions on the *Permissions(3)* tab:

t.	Edit user	×
User user1 (pass= user1)	Store: General 💌	
General Permissions Permissions (2) Permission	ns (3) Log-on modes Details	
Document management Tenders Upload document Download document Delete document Download document Download document Delete document Delete document Delete document Delete document Download document Delete document Consolid document Delete document Consolid document Delete document Consolid document Delete docume	Virtual Stores ✓ Create new stores ✓ Edit store details ✓ Edit visibility in stores Reminders ✓ Edit and delete reminders assigned to me Admin ✓ Send email ✓ Purge old records ✓ Spare ✓ Set start of year stock ✓ View/edit preferences ✓ Export & import ✓ Backup data file Assets View assets Add/edit assets Setup assets	Customer budgets Add/import customer budgets Edit/delete customer budgets
 Edit stocktake lines Delete stocktake lines Can edit stocktake dates 	Web dashboard	
All on		Delete Cancel OK

See Managing users if you need more detail.

Note that if a supplier has supplied paper documentation, you may wish to scan it and incorporate the scanned copies into the tender.

Last update: 2017/08/31 tender_management:reference_documents https://docs.msupply.org.nz/tender_management:reference_documents?rev=1504192556 15:15

1 ,	New Tender					
Description:						
Creation Date:	26/03/15 Issue Date: 26/0	3/15 Response By D	Date/Time: 26/04/15 00:00	GMT Status: ≤g ▼	Locked	
Our ref:						
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Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronize Log						
+	show: Show All					
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Clicking *Upload document* allows you to browse to the folder containing the required document, select it and upload it to your computer to a folder within the mSupply data folder. It now appears in the lower section of the window.

A document may be deleted by selecting it and clicking on the Delete document icon

To view a document which has been uploaded, select it from the list, and click on the *Download document* icon; you then have to choose whether simply to download or to download and open the document; a *Browse for folder* window appears and you should select a folder where a copy of the document is to be stored; it may then be accessed from that folder for viewing and/or editing.

To edit an uploaded document, the procedure described for viewing is followed, and, once edited, the document is saved. The edited document now needs to be uploaded, following the *Upload Document* procedure. It is not necessary to change the document's name, as mSupply will recognise that changes have been made, and will save it as a new version, the relevant number appearing in the rightmost column. The drop-down list above that column allows all versions to be displayed, or only the latest one.

Previous: Adding suppliers to a tender Next: Receiving Quotations from suppliers



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