

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:

The screenshot shows the 'Edit user...' dialog box with the 'Permissions (3)' tab selected. The 'User' field is set to 'user 1 (pass= user1)' and the 'Store' is set to 'General'. The 'Permissions (3)' tab contains several sections with checkboxes for permissions:

- Document management**
 - Tenders** (highlighted with a red box):
 - ☒ Upload document
 - ☒ Download document
 - ☒ Delete document
 - Quotes**:
 - ☒ Upload document
 - ☒ Download document
 - ☒ Delete document
 - ☐ Modify quotes entered by the supplier (via the website)
 - Items Lines (Batches of stock)**:
 - ☒ Upload document
 - ☒ Download document
 - ☒ Delete document
 - Stocktakes**:
 - ☒ Create Stocktake
 - ☒ Delete Stocktake
 - ☒ Add stocktake lines
 - ☒ View stocktake lines
 - ☒ Edit stocktake lines
 - ☒ Delete stocktake lines
 - ☒ Can edit stocktake dates
- 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
- Web dashboard**:
 - ☐ Can view the dashboard

At the bottom of the dialog, there are buttons for 'All on', 'Delete', 'Cancel', and '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 then upload the scanned copies to the tender.

New Tender

Description:

Creation Date: 26/03/15

Issue Date: 26/03/15

Response By Date/Time: 26/04/15 00:00 GMT

Status: sg

Locked

Our ref:

Comments:

Items and Compare Prices

Notes

Choose Suppliers and Enter responses

Standard conditions

Purchase order

Reference documents

Tender preferences

Synchronize

Log

+

Upload document

—

Delete document

↓

Download document

Show: Show All

File Name	Created by	Created on	Saved on	Version no

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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