



**IFAD | OPEN**

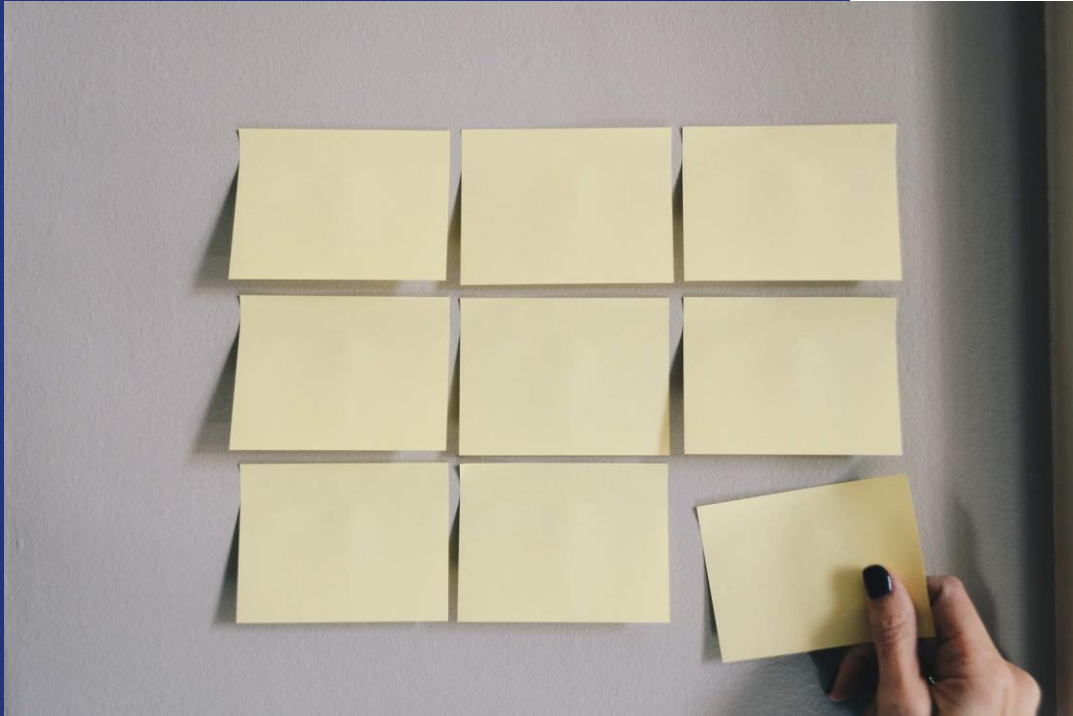


Investing in rural people

# OPEN – Procurement End-to-End System

## MANAGING DOCUMENTS

USER TYPE: Procurement officer/assistant  
(Other user profiles will only have viewing rights)

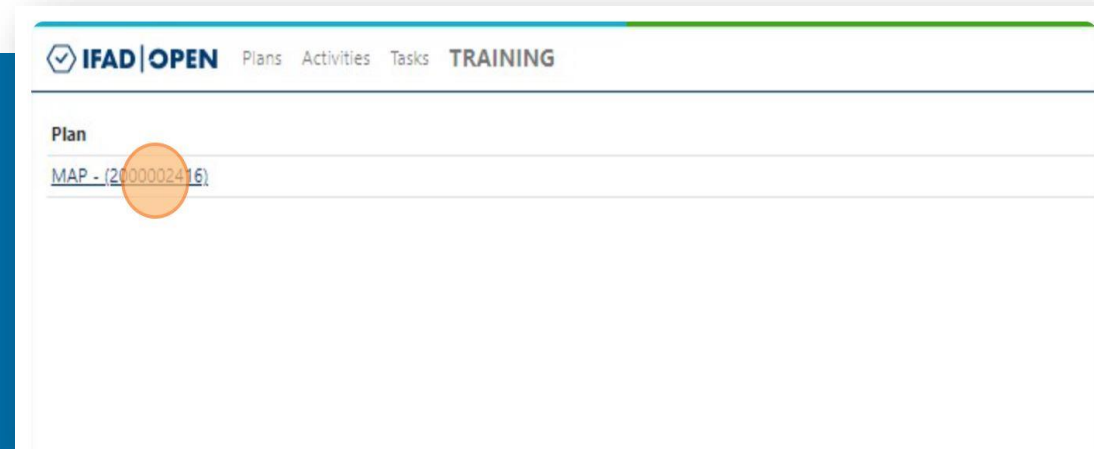


## WHAT DOES THIS QUICK CARD COVER?

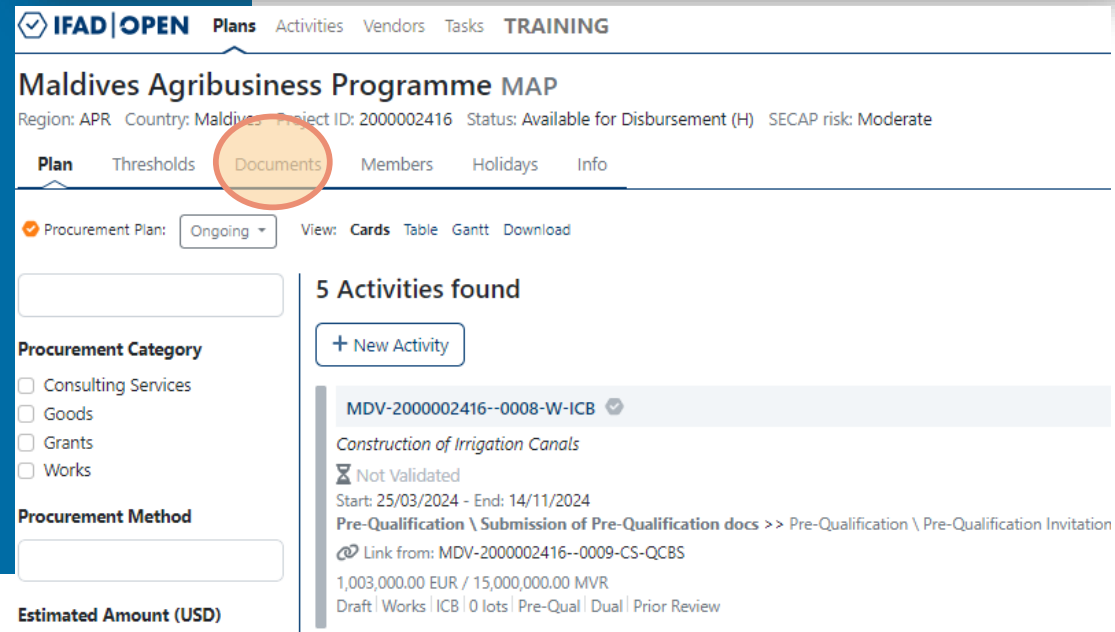
- Uploading documents at the procurement **plan level**
- Uploading documents at the procurement **activity level**
- **Display** of uploaded documents
- **Uploading** different versions of documents
- **Tagging** documents
- **Deleting** documents

# UPLOADING DOCUMENTS AT THE PROCUREMENT PLAN LEVEL

1. Click the title of the Procurement Plan to which you want to attach a document



2. Once inside the Procurement Plan, click on the Documents tab.



IFAD | OPEN Plans Activities Vendors Tasks TRAINING

## Maldives Agribusiness Programme MAP

Region: APR Country: Maldives Project ID: 2000002416 Status: Available for Disbursement (H)

Plan Thresholds **Documents** Members Holidays Info

**+ Upload**

1. Click 'Upload'

Drop files here or [browse files](#)

My Device

2. Click 'browse file' to select file(s) from your PC folders or simply drag and drop the file(s) inside the pop-up

Cancel 2 files selected + Add more

Forecast\_Work...GB 15\_03.xlsx 192 KB

MAP AWPB 2023.xlsx 7.5 KB

**Upload 2 files**

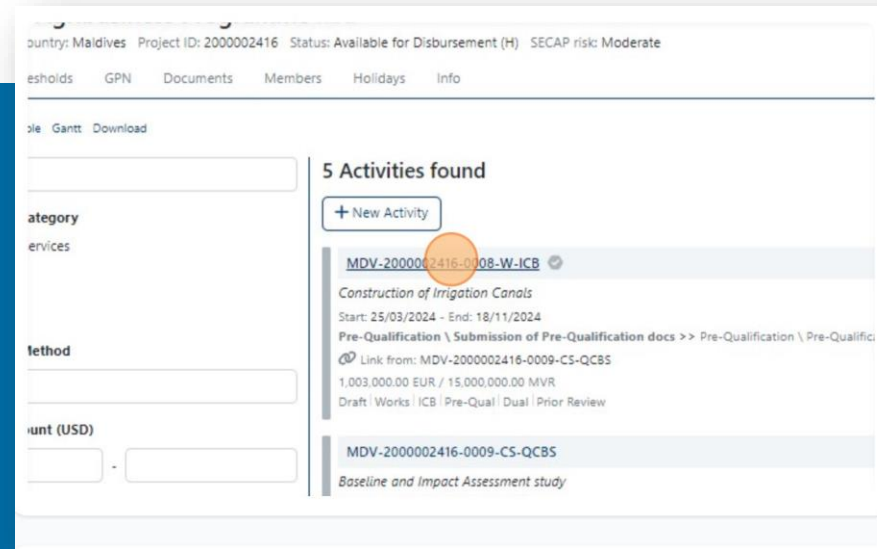
3. If you want you can upload multiple files at once!

**Upload 1 file**

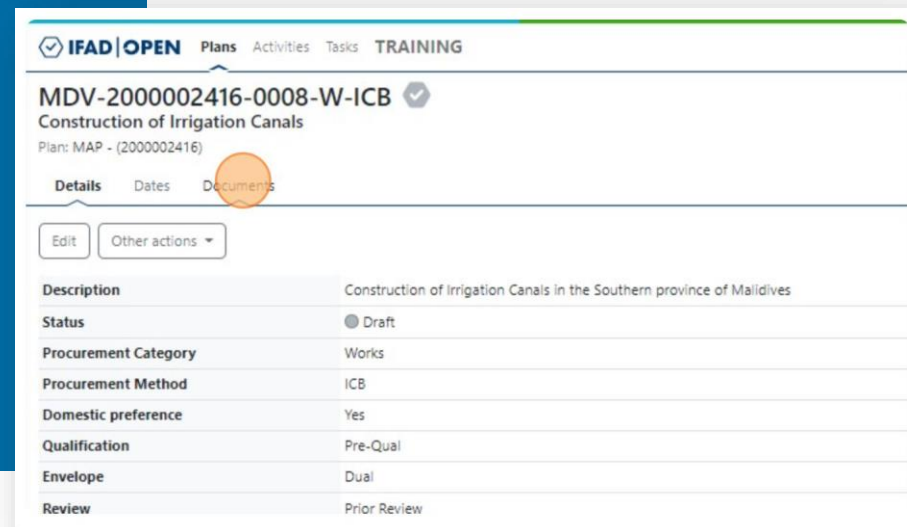
4. Click 'Upload 1 file'

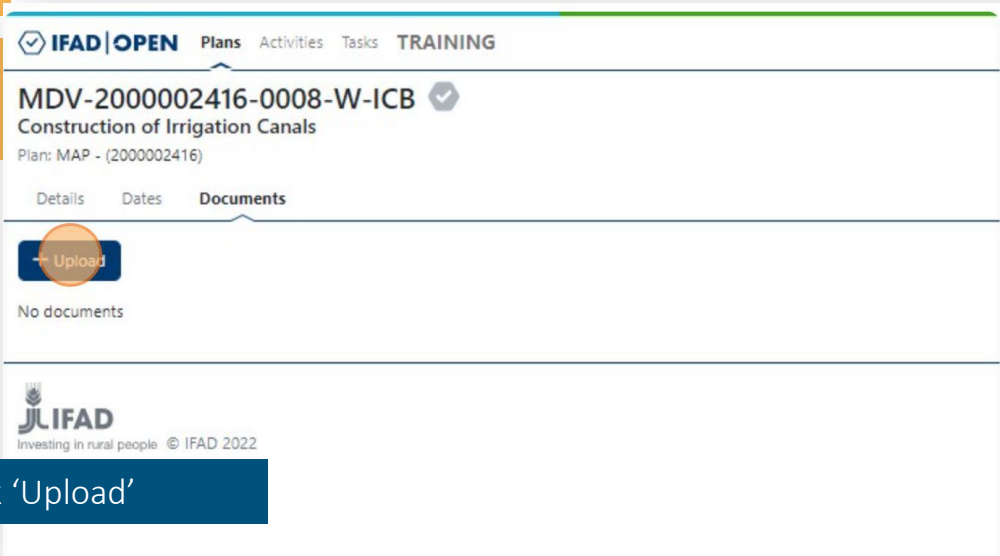
# UPLOADING DOCUMENTS AT THE PROCUREMENT ACTIVITY LEVEL

1. From the Procurement Plan, click the title of the Procurement Activity to which you want to attach a document

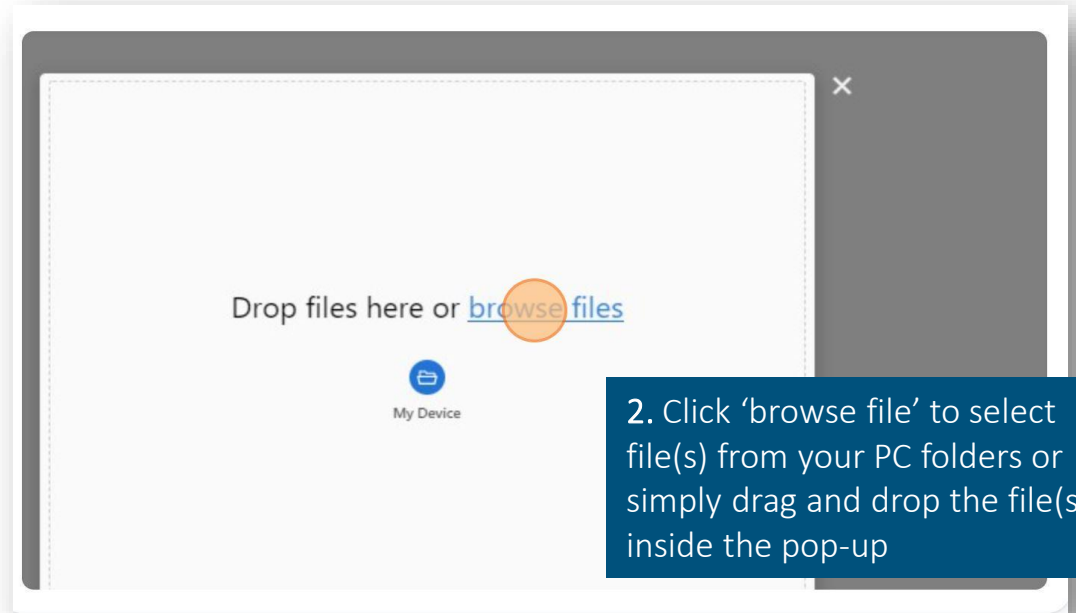


2. When on the activity page, click on the 'Documents' tab.

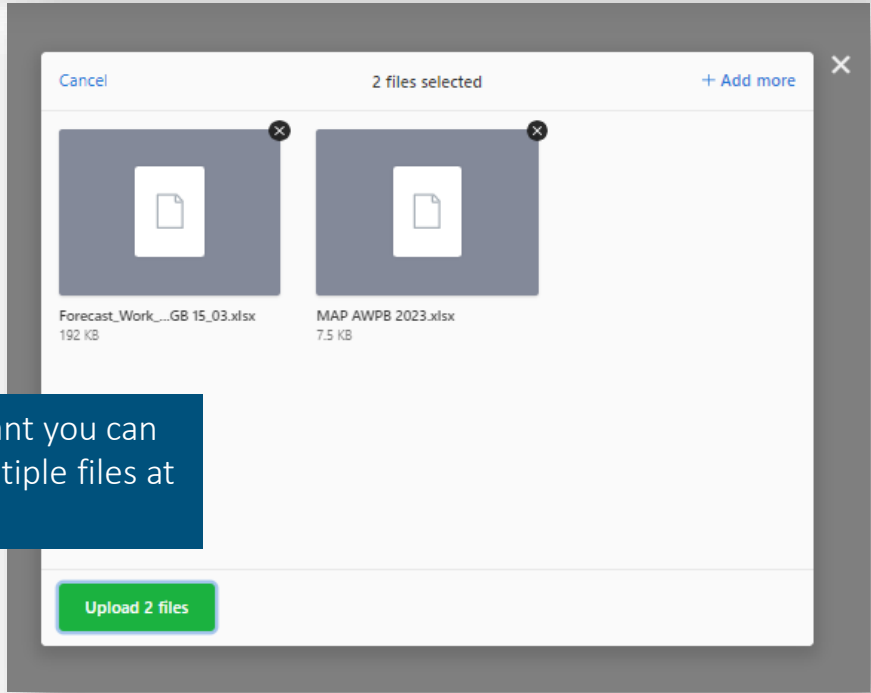




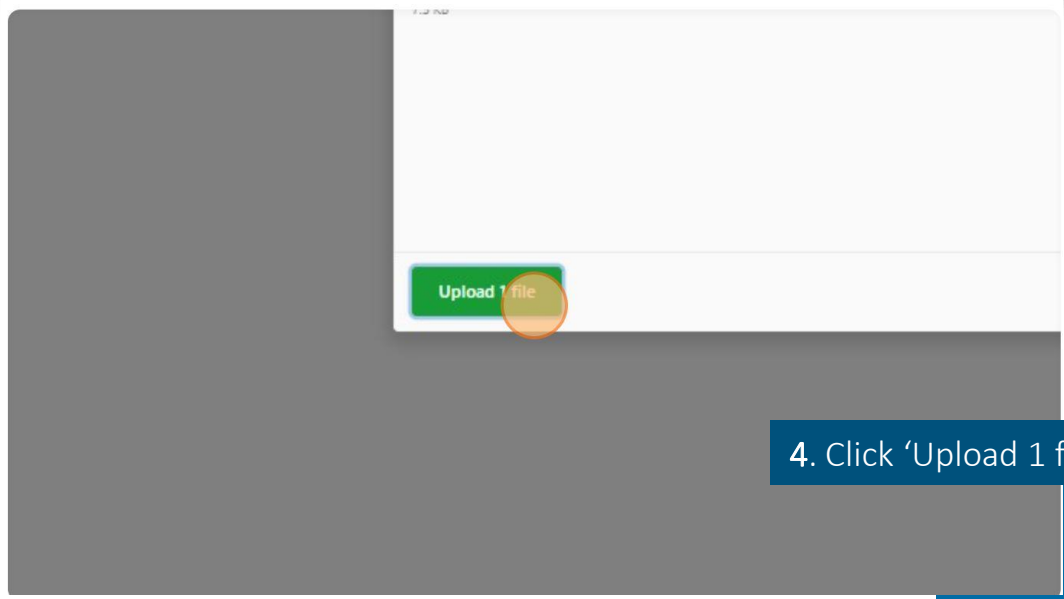
1. Click 'Upload'



2. Click 'browse file' to select file(s) from your PC folders or simply drag and drop the file(s) inside the pop-up

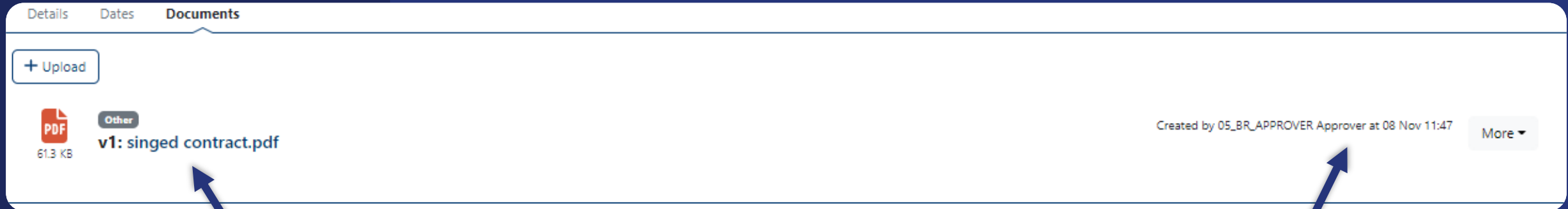


3. If you want you can upload multiple files at once!



4. Click 'Upload 1 file'

# DISPLAY OF UPLOADED DOCUMENTS



Automatically the system will categorize the document as the version «v1»

You will also be able to see who uploaded the document and when

# UPLOADING DIFFERENT VERSIONS OF DOCUMENTS

Created by 05\_BR\_APPROVER Approver at 08 Nov 14:31

More ▾

Edit properties

New version

Delete

05\_BR\_APPROVER Approver | less than a minute ago  
Uploaded document v1: MAP AWPB 2023.xlsx  
Show changes

No more events

1. To upload an updated version of a document, click on 'More' and then click on 'New version'

2. Click 'browse file' to select file(s) from your PC folders or simply drag and drop the file(s) inside the pop-up

Drop files here or [browse files](#)



My Device

Upload 1 file

3. Click 'Update 1 file'





## Maldives Agribusiness Programme MAP

Region: APR Country: Maldives Project ID: 2000002416 Status: Available for Disbursement (H) SECAP risk: Moderate

Plan Thresholds **Documents** Members Holidays Info

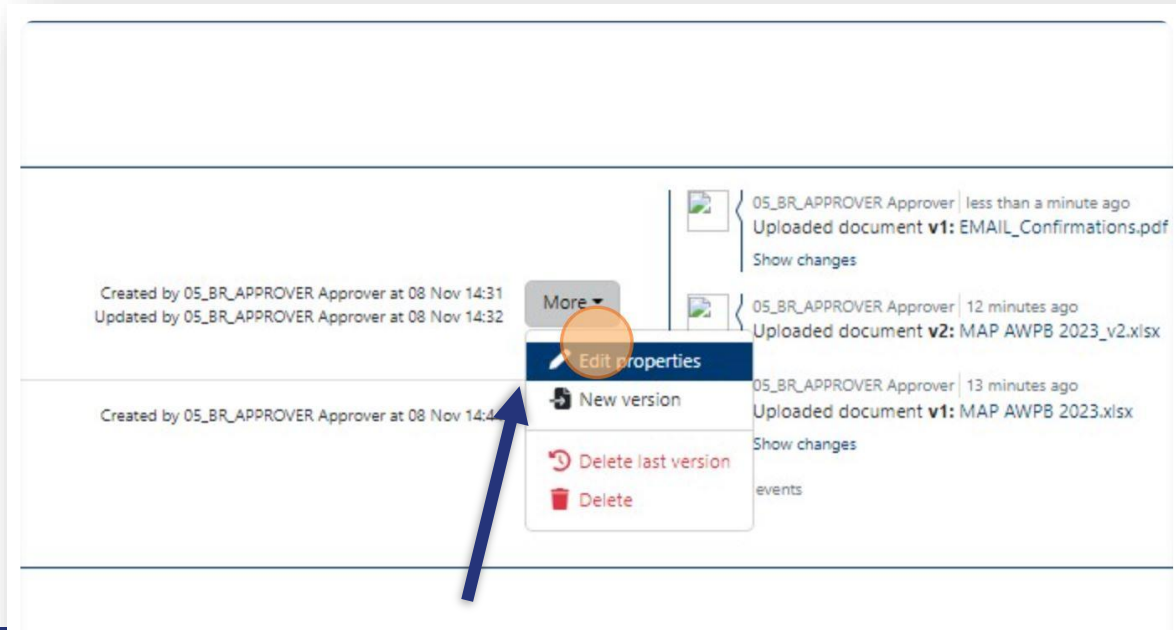
+ Upload

-  **Background Email**  
**v1: EMAIL\_Confirmation.pdf**  
61.3 KB  
Insérer une description  
Created by 05\_BR\_APPROVER Approver at 15 Nov 14:21  
Updated by 05\_BR\_APPROVER Approver at 15 Nov 14:21  
[More ▾](#)
-  **Annual Work Plan and Budget**  
**v2: MAP AWPB 2023\_v2.xlsx**  
7.47 KB  
Insert additional useful info  
1 past version ▾

The document will automatically be renamed 'V2' and by clicking on '1 past version' you will always be able to download the old version.

You will also be able to see who updated the document and when

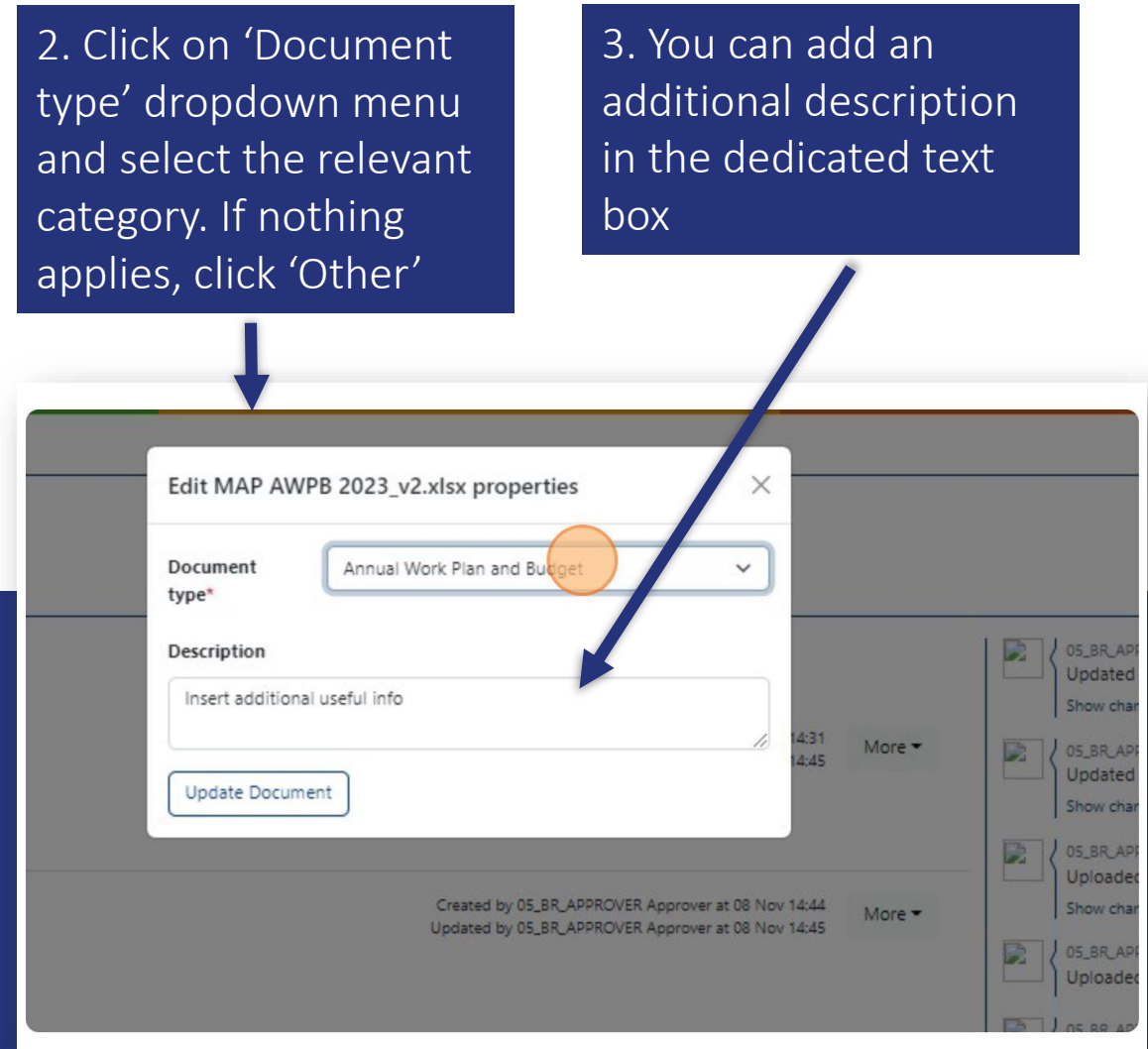
# TAGGING DOCUMENTS



1. To tag a document, click 'More' and then click 'Edit properties'

2. Click on 'Document type' dropdown menu and select the relevant category. If nothing applies, click 'Other'

3. You can add an additional description in the dedicated text box



On the right side of the screen, you will be able to see the timeline of events and actions performed

The screenshot displays a document management interface. At the top left, there is a '+ Upload' button. Below it, two documents are listed:

- Annual Work Plan and Budget**  
v2: MAP AWPB 2023\_v2.xlsx  
7.47 KB  
Insert additional useful info  
1 past version
- Background Email**  
v1: EMAIL\_Confirmations.pdf  
43.8 MB  
Insert description

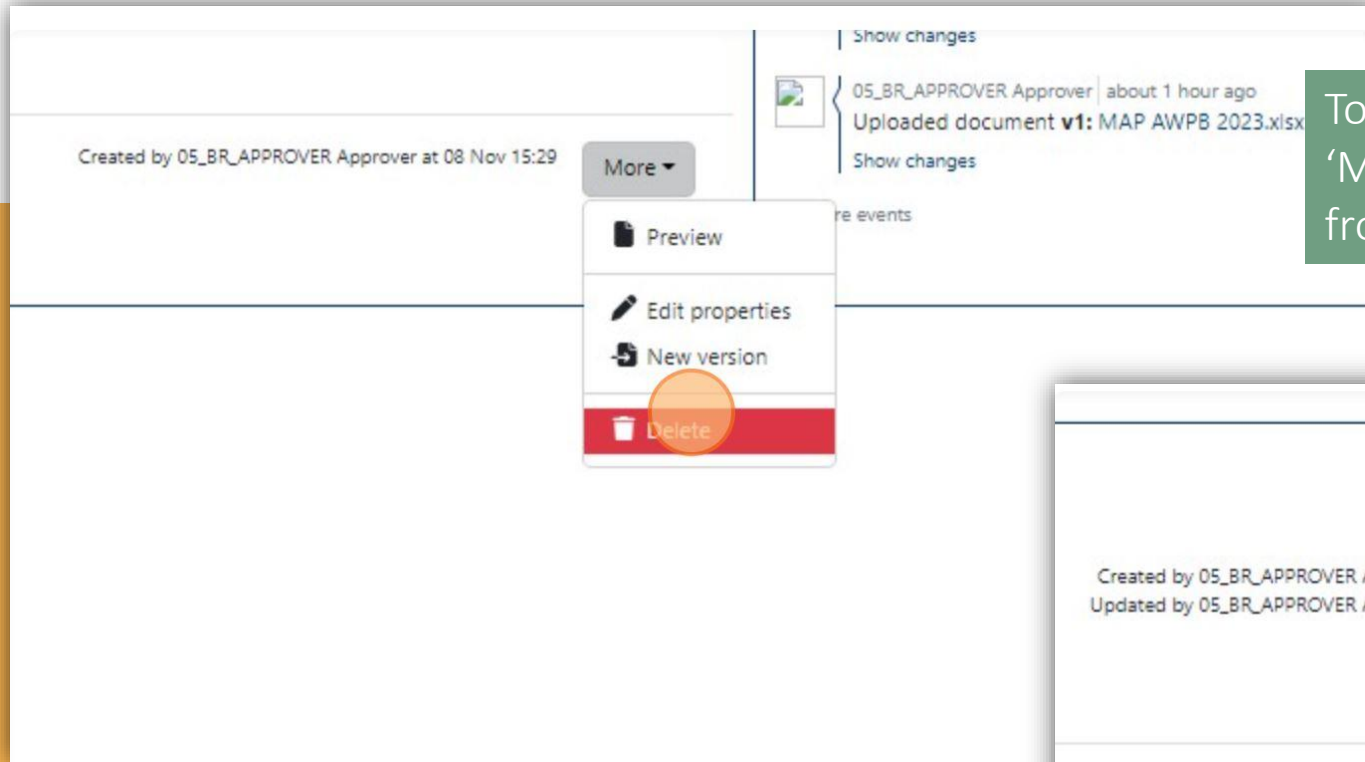
For each document, there is a 'More' dropdown menu. The right side of the interface shows a timeline of events:

- 05\_BR\_APPROVER Approver | 26 minutes ago  
Updated document  
Show changes
- 05\_BR\_APPROVER Approver | 26 minutes ago  
Updated document  
Show changes
- 05\_BR\_APPROVER Approver | 27 minutes ago  
Uploaded document v1: EMAIL\_Confirmations.pdf  
Show changes
- 05\_BR\_APPROVER Approver | 39 minutes ago  
Uploaded document v2: MAP AWPB 2023\_v2.xlsx
- 05\_BR\_APPROVER Approver | 40 minutes ago  
Uploaded document v1: MAP AWPB 2023.xlsx  
Show changes

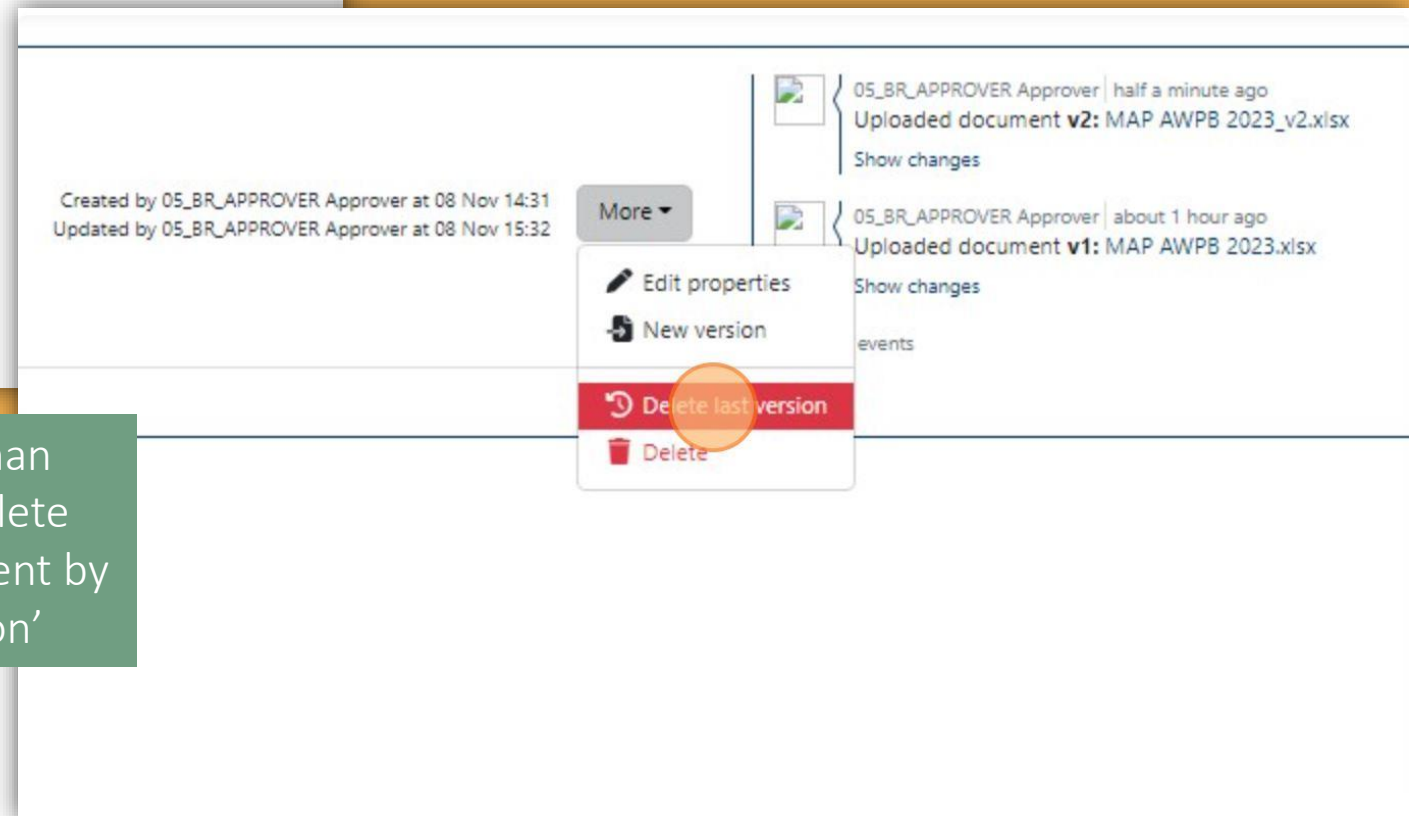
At the bottom of the timeline, it says 'No more events'.

In the document list, you will be able to see the document tag above its title and its title description below it

# DELETING DOCUMENTS



To delete a document, click on 'More' and then click on 'Delete' from the dropdown menu



If the document has more than one version, you can also delete only a version of the document by clicking on 'Delete last version'