



GLOBAL HEALTH SUPPLY CHAIN – QUALITY ASSURANCE

QA.WI.GEN-03.01

Instructions for Creating and Submitting Technical Documentation to FHI 360

The FHI 360 Technical Files and appendices **for each offered product** shall be submitted in a **single PDF** document. The following are the instructions to prepare the submission.

All documentation should be combined and uploaded as a single pdf per product. This should include the completed Technical Questionnaire with all supporting documentation included as appendices. The Technical Questionnaire and the appendices should be bookmarked.

A SharePoint document library will be created for your company to upload the technical files and documentation relevant to the Request.

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1.0 PURPOSE

The purpose of this work instructions (WI) is to provide step by step instructions on how to create and submit technical documents to FHI 360 SharePoint site.

2.0 SCOPE

This WI applies to all clients who response to the Request for Information (RFI), Request for Proposal (RFP), Request for Quotes (RFQ), or to submit additional supporting information for a Variance.

3.0 DEFINITION

SharePoint is a web-based collaborative platform that integrates with Microsoft Office. SharePoint is primarily a document management and storage system.

4.0 CREATE A PDF VERSION OF EACH DOCUMENT

4.1 Word Document

To create a pdf from a Word document, open the document in Microsoft Word and click File and then Print. In the printer pull-down menu, select Adobe pdf. The same process can be followed to create a pdf from an Excel or PowerPoint file.

4.2 Scanned Document

- 4.2.1 Choose Scan a Document using the software and scanner available to your organization. Refer to the user manual for your scanner and use the following setting:
- Scan resolution: minimum 200 dpi
 - If color coded material: scan in color; otherwise use Black and White.
 - Scan document as a pdf – if available with optical character recognition (OCR). (Formats such as JPEG, TIFF should only be used to scan pictures).
- 4.2.2 Review the scanned document and correct unreadable material and/or mistakes generated as part of the OCR recognition.

5.0 COMBINE MULTIPLE PDF FILES INTO A SINGLE PDF

All documentation should be combined and uploaded as a single pdf per product. This should include the completed Technical Questionnaire with all supporting documentation included as appendices (i.e. Product Formulation, FPP Specifications and Test Methods, FPP Packaging and Labeling, Stability data, Licensing status, CPP, Registration status and etc.)

- Within Adobe Acrobat, click on the Tools menu and select Combine Files.
- Click Combine Files and then Add Files to select the files you want to include.
- Click, drag, and drop to reorder the files and pages.
- When finished arranging files, click Combine Files.
- Click Save.

6.0 CREATE BOOKMARKS

The Technical Questionnaire and all appendices should be bookmarked.

- Within Adobe Acrobat, click the Bookmarks button (looks like a blue ribbon) on the left to open the Bookmarks panel.
- Navigate to the page you want to bookmark and highlight the text to use in the bookmark.
- Click New Bookmark (icon with a blue ribbon with a yellow medal)
- To create a hierarchy, select the range of bookmarks you want to nest and drag those icons directly underneath the parent bookmark icon.
- For more information on creating bookmarks, read Adobe's instructions on [Page thumbnails and bookmarks in PDFs](#)

7.0 NAME THE PDF FILE

Prior to uploading documents to SharePoint, please ensure they comply with the following formatting requirements:

- File names should run no longer than twenty (20) characters
- File names should not include special characters (only use letters, numbers, periods, underscores, or dashes)
- File names should use underscores instead of spaces between words (e.g. "File_Name" not "File Name")
- In general, please try to include your company name, the product name into the file name. Below are some examples:
 - Example 1: Product Code_Supplier.pdf (012345_NEWCO.pdf)
 - Example 2: Product Name_Supplier.pdf (NEWPRODUCT_NEWCO.pdf)

8.0 SUBMIT TECHNICAL FILES

8.1 Request Access to FHI 360 SharePoint

To request access to the SharePoint document library for your company, send an email to Hien Dinh at hdinh@fhi360.org. In your email, provide the name, company, and contact information (including email address) for the person who will be responsible for uploading the product documentation to SharePoint site.

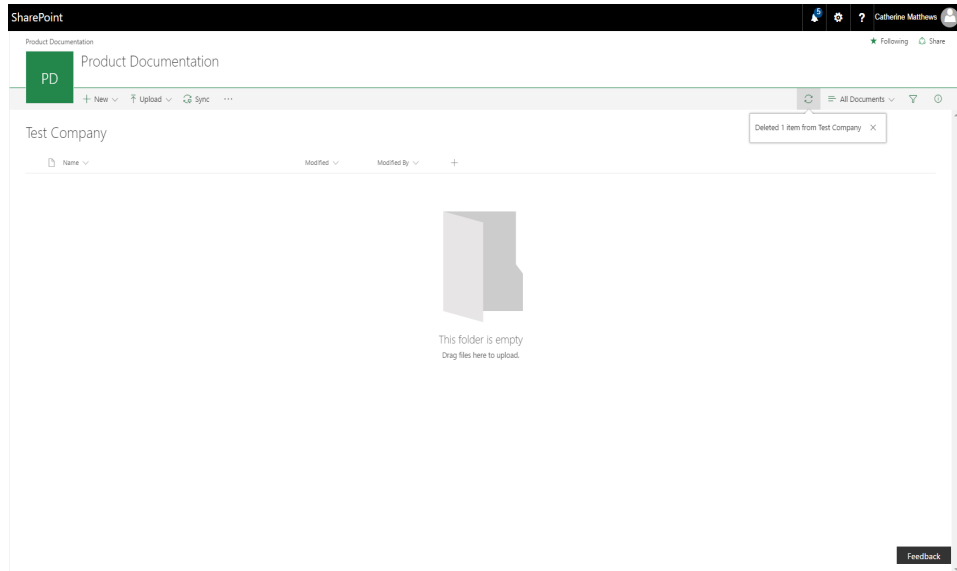
Your document library will be accessible only to the point of contact you specifically designate. Please do not share access with others.

If you need assistance in using SharePoint, please contact Hien Dinh (hdinh@fhi360.org).

9.0 INSTRUCTIONS FOR UPLOADING DOCUMENTS TO SHAREPOINT

In general, SharePoint functions is best with Internet Explorer, although other web browsers should allow you to upload and organize documents.

When you first open your SharePoint document library, it should look like the figure below:

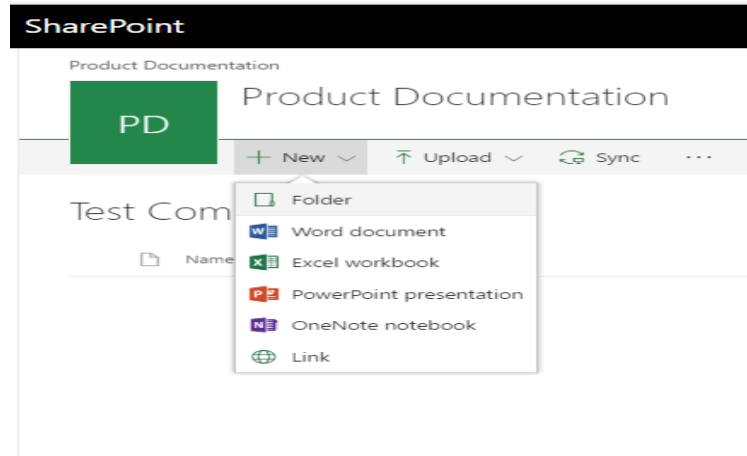


9.1 Create Folders for Each Product

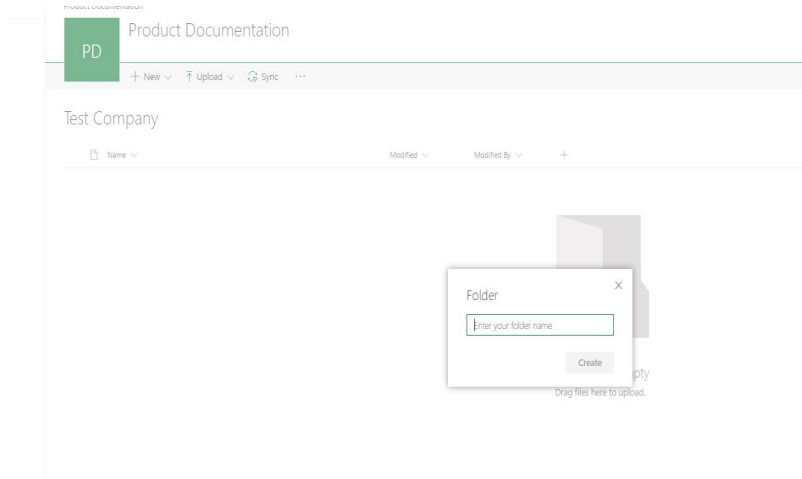
You will need to create folders for **each product** for which you are uploading files.

To create a folder

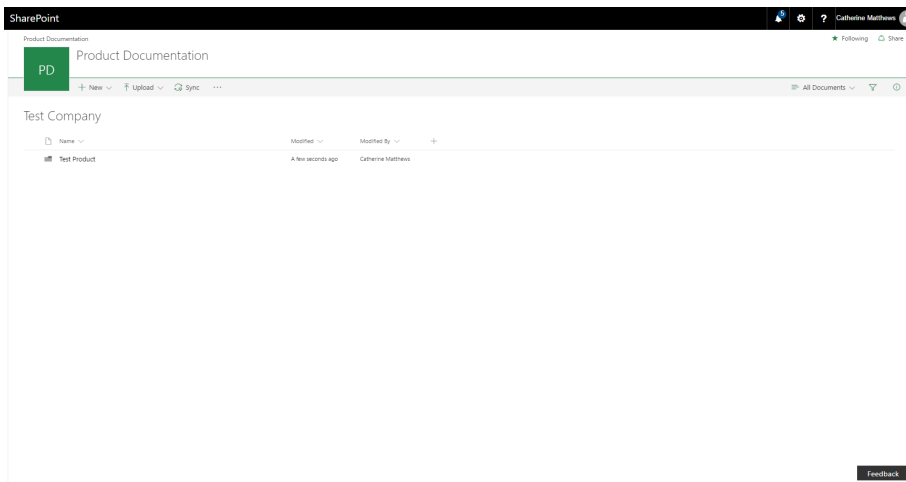
Click on the **"New"** drop down menu below your document library name (in this case, Test Company) and select "Folder."



Name your new folder after the product for which you will be uploading documents.

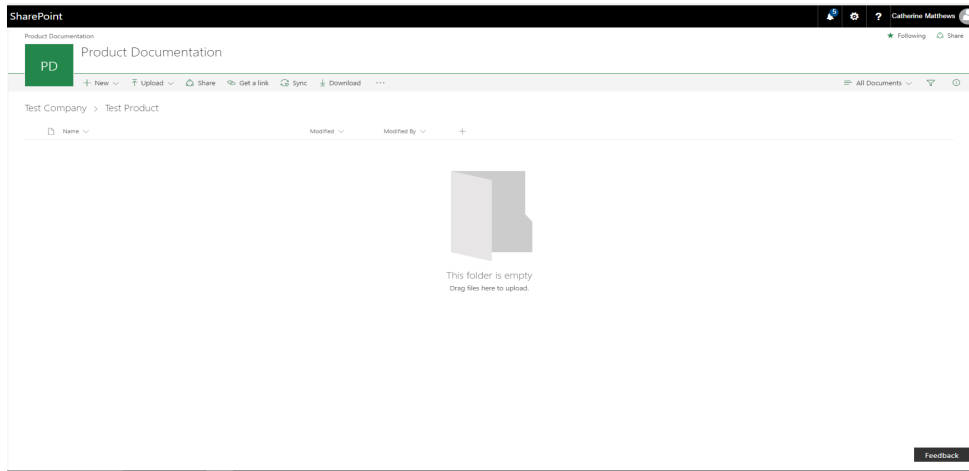


Click "Create."
Repeat this process for each product you will be uploading documents.

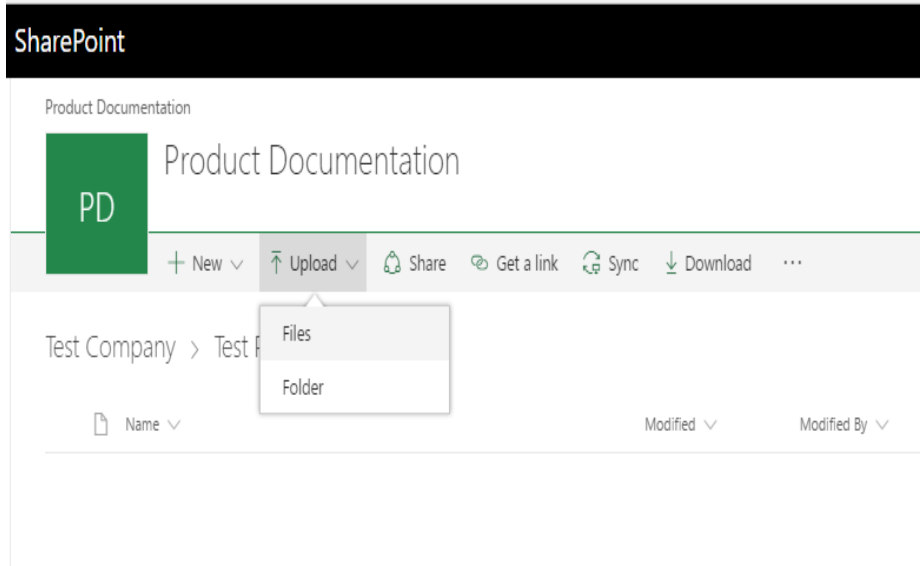


9.2 Upload a new document

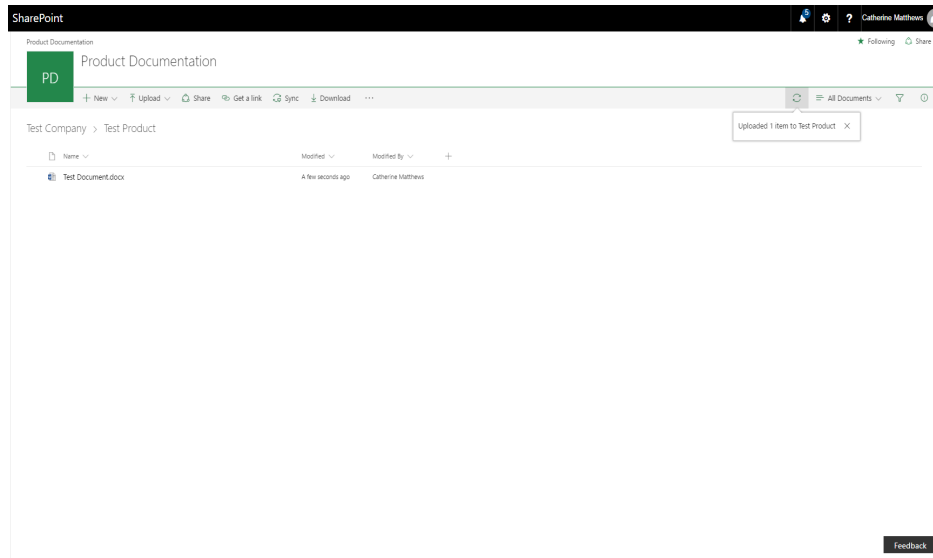
To upload a new document, navigate into the relevant product folder.



Click the “Upload” button (next to “New”) and select “Files.”



Select the files you wish to upload from File Explorer and click “Open.” Once the document has uploaded, you will see a notification in the top right corner of the document library.



If you wish to upload multiple documents at once, you can drag and drop files directly from File Explorer on your computer. For further instructions, reference [“Upload a folder or files to a document library”](#) from Microsoft.

Once you have uploaded all the documents you plan to submit, you may notify Hien Dinh at hdinh@fhi360.org.