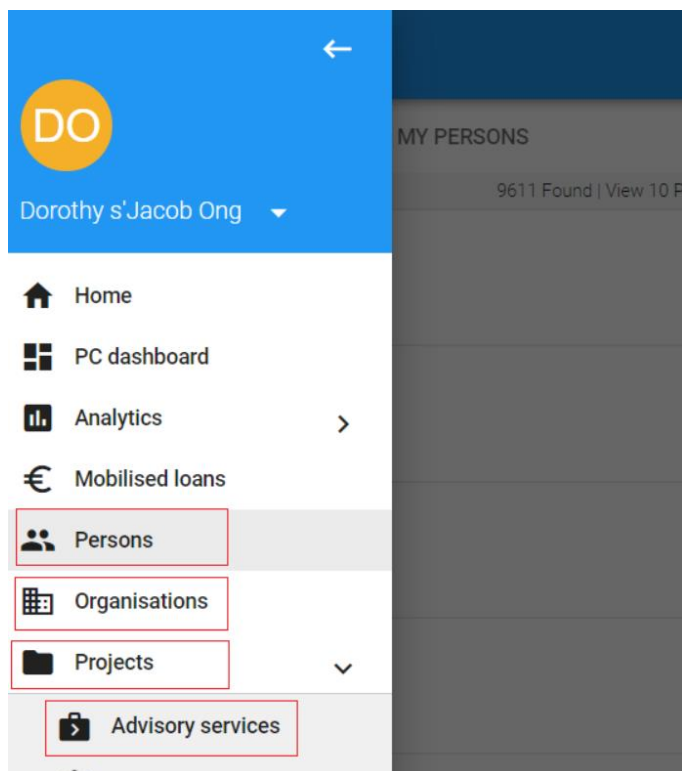


## User manual SharePoint integrated in Agro-info.net

The core function of SharePoint in AIN is to enable saving documents with the AIN tab Documents directly in SharePoint in a format that is easier accessible . The SharePoint key documents functionalities remain unchanged in AIN. For the time being, sync offline folder in AIN is only available for modules Projects and Assignments by using the sync button. Which documents to store in which default folder is listed in Appendix 1.

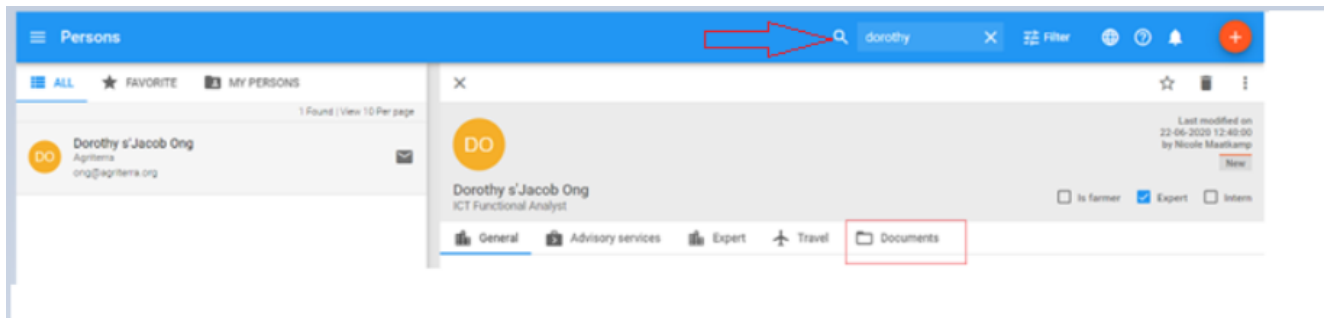
### Where can I find the integrated SharePoint folder in AIN?

There is a new tab called Documents in the modules Persons, Organisations, Projects and Advisory services. Within these modules you can find the tab Documents.

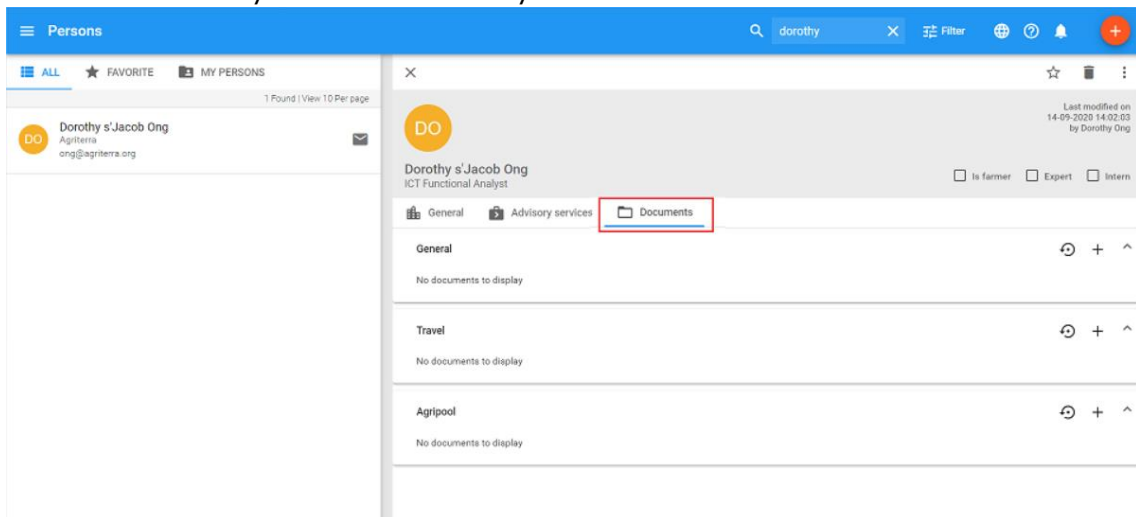


## Module Person

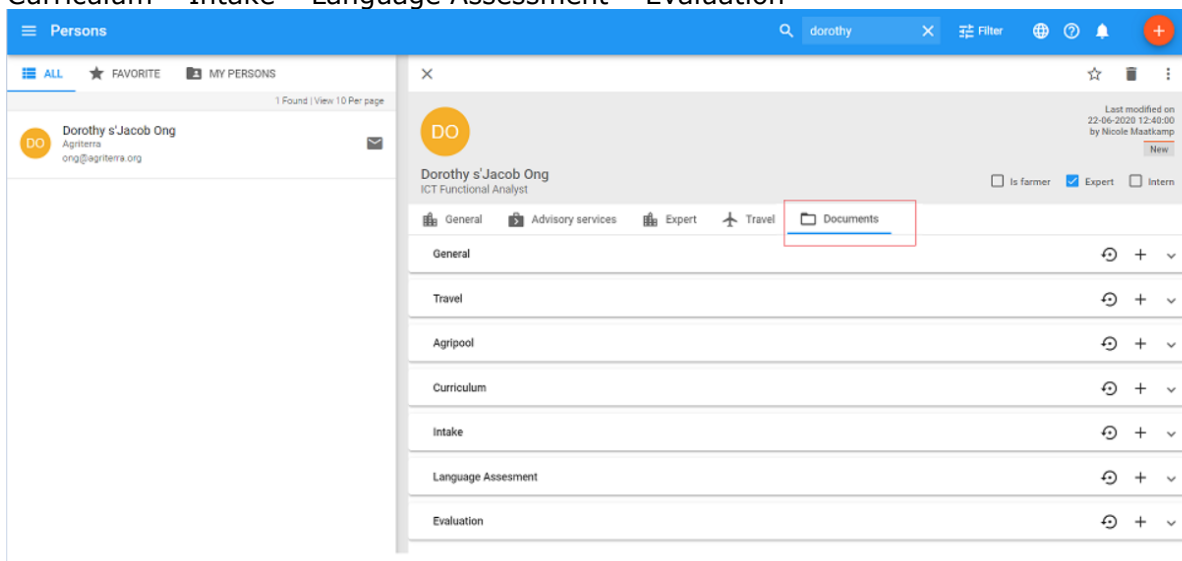
In module Persons you will find all relevant documentation in one central view which is in the new tab Documents. First step is to search for the persons name, then click on tab Documents:



Here within the Documents tab, you will see default SharePoint folders where you can store and work in your documents as you are accustomed to in SharePoint

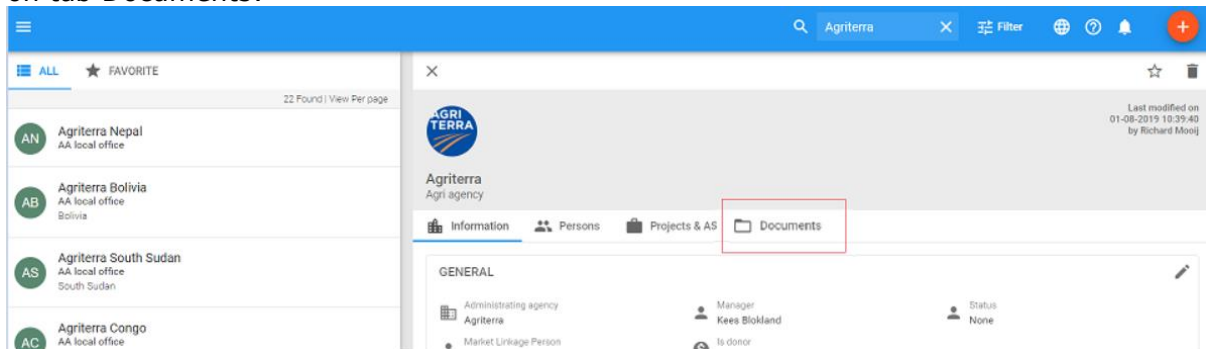


Default folders of an Expert in module Persons are: General – Travel – AgriPool – Curriculum – Intake – Language Assessment – Evaluation

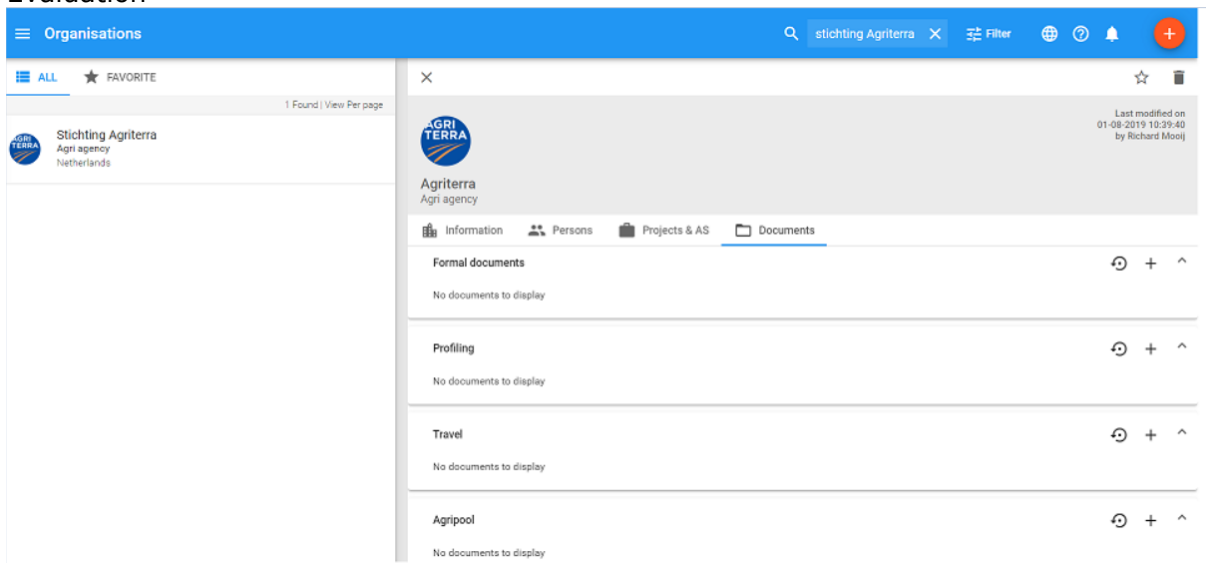


## Module Organisations

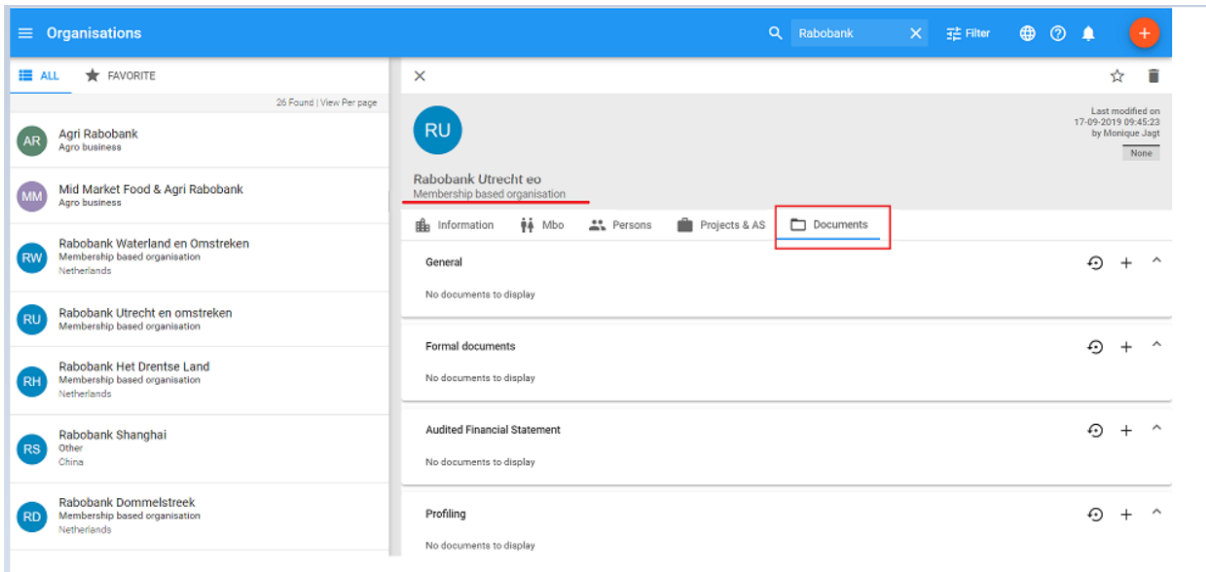
In module Organisations you will find all relevant documentation at one central view, which is in the new tab Documents. First step is to search for the organisation, then click on tab Documents:



Within the Documents tab you will find default SharePoint folders where you can store and work in your documents as you are accustomed to in SharePoint. The default folders in module Organisations are: General – Formal documents – Profiling – Travel – AgriPool - Evaluation

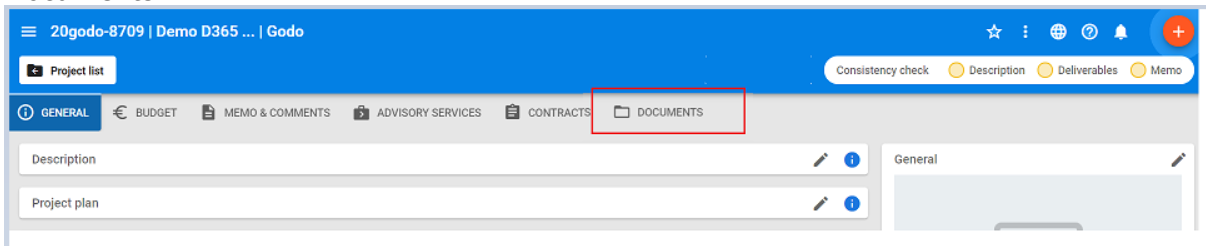


MBO folders in Organisations are: General – Formal documents – Audited Financial Statement – Profiling – Travel – AgriPool - Evaluation

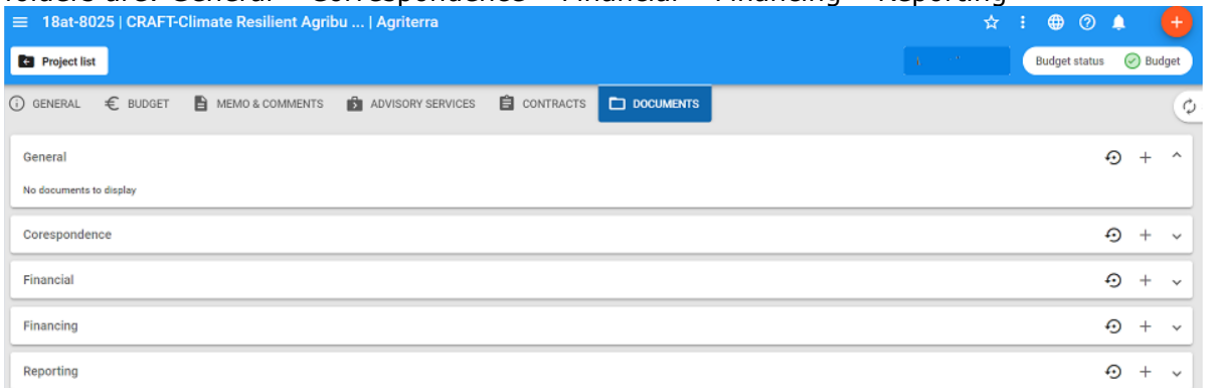


## Module Project

In the module Projects you will find all relevant documentation at one central view which is in the new tab Documents. First step is to search for the project, then click on tab Documents

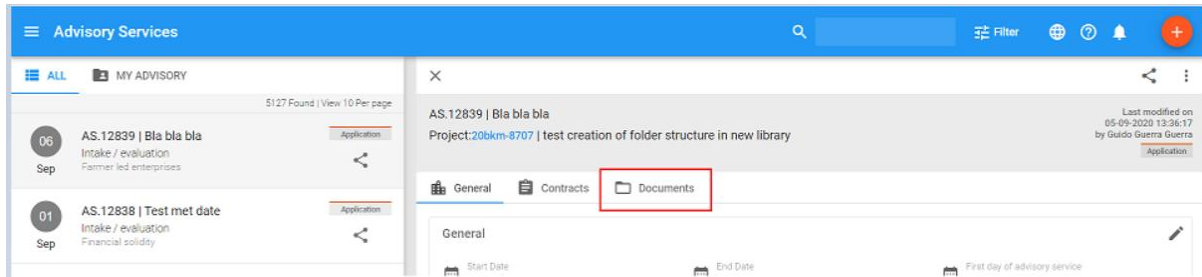


Within the Documents tab you will see default SharePoint folders where you can store and work in your documents as you are accustomed to in SharePoint. The default Project folders are: General – Correspondence – Financial – Financing – Reporting

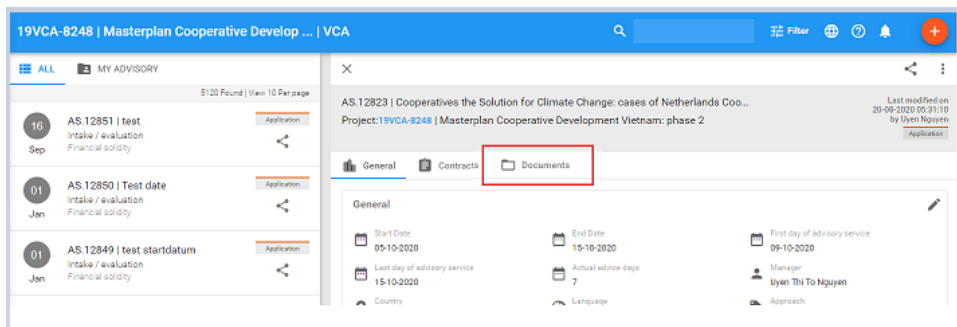


## Module Advisory Services

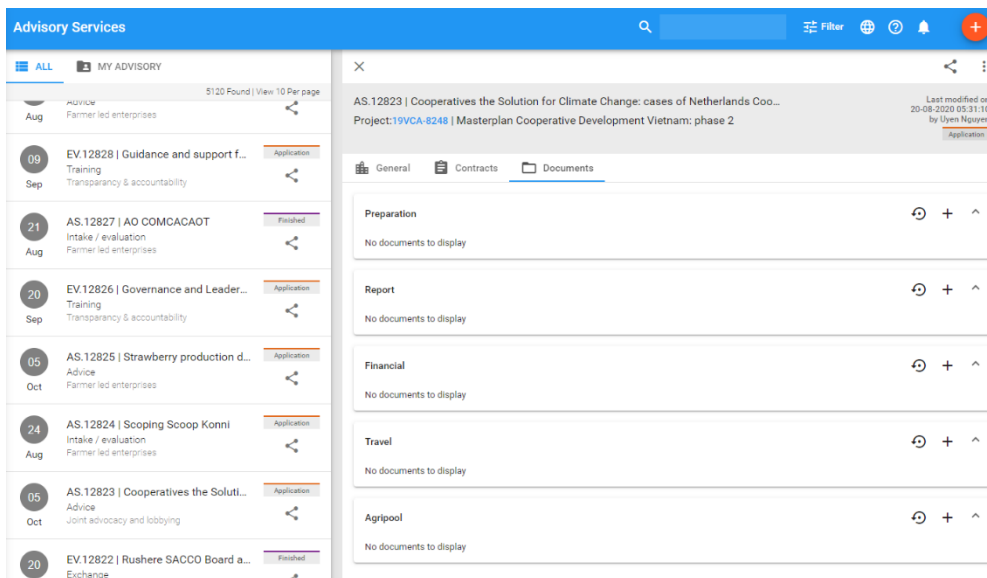
In the module Advisory Services you will find all relevant documentation in one central view, which is in the new tab Documents. First step is to search for the advisory service, then click on the tab Documents:



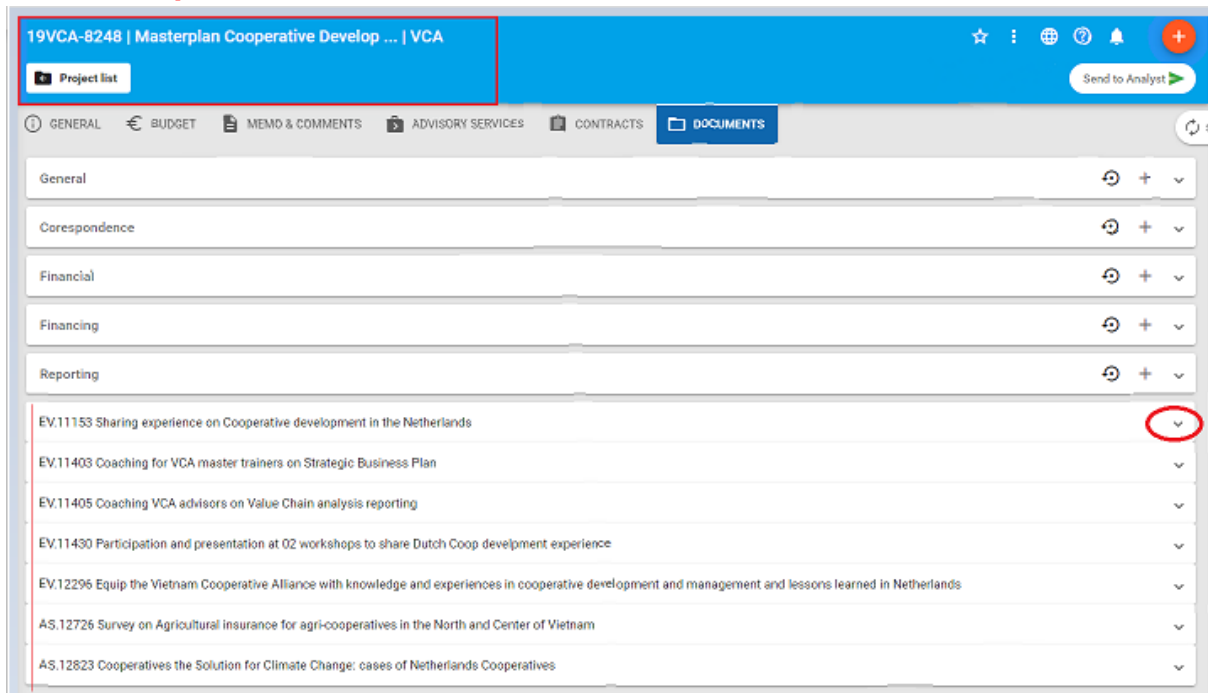
Here within the Documents tab you will see default SharePoint folders where you can store and work in your documents as you are accustomed to in SharePoint.



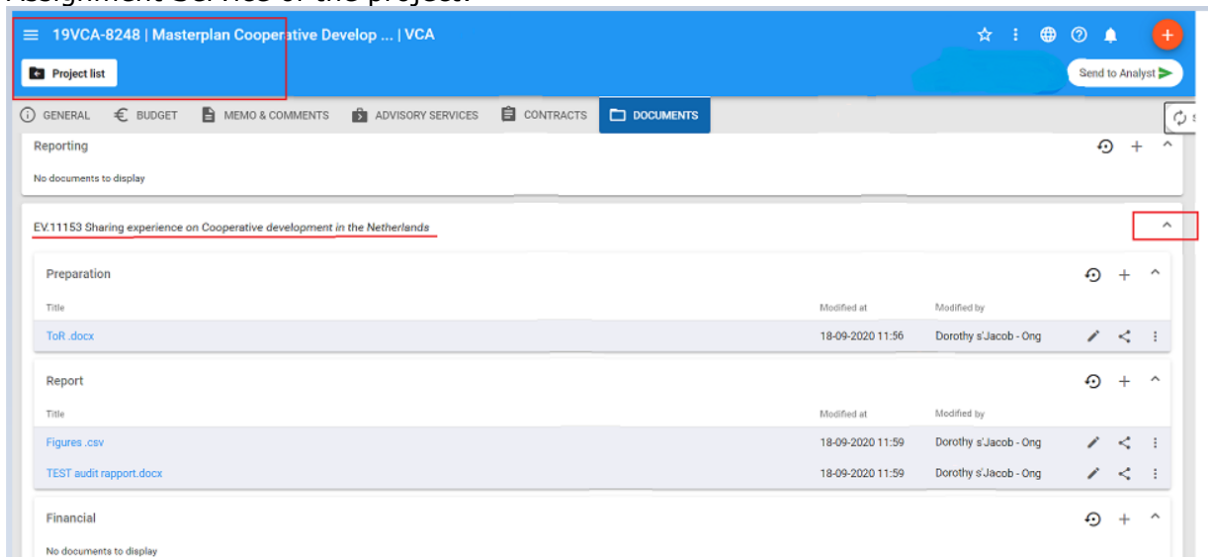
The default Advisory Services folders are: Preparation – Report – Financial – Travel – AgriPool



The Advisory Services folders are also visible in the Project they belong to. Within the Project in the tab Documents, you are able to **unfold the folder by clicking the downward parentheses**



Via unfolding a folder you are able to work in the the folder-list and also in the related Assignment Service of the project:



## SharePoint key functionalities

Document functionalities in AIN remain the same as the current known SharePoint key functionalities.

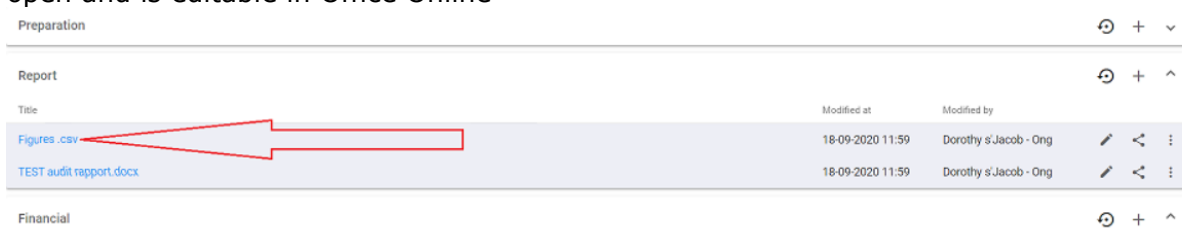
### Upload documents files

Select the folder you where you want to upload your document. Click on the + icon on the command bar. The document will be uploaded. Note: upload speed depends on the quality of the internet connection.




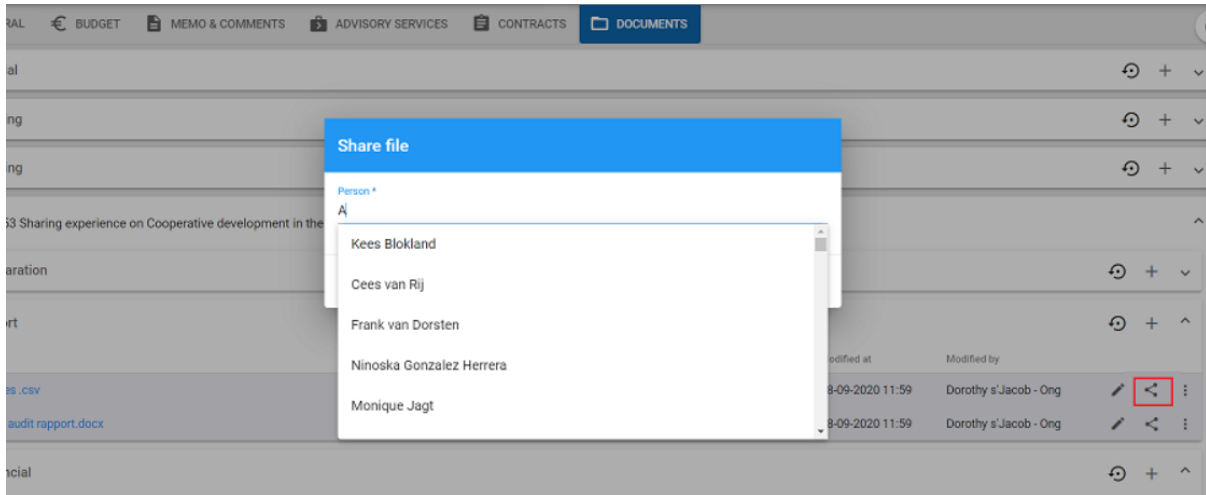
### Open & edit document

Select the document you want to work on or that you want to edit. The document will open and is editable in Office Online




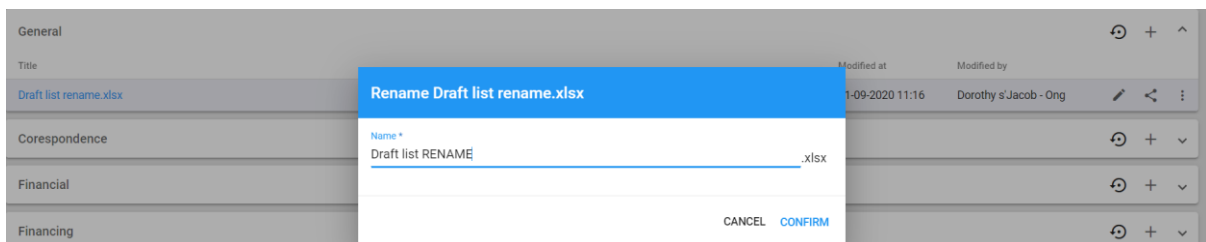
## Sharing document

Select the document you want to share and click on the icon share  on the command bar, and enter the names of the people you want to share it with. Then click on CONFIRM button




## Renaming document

Select the document you want to rename and click on the 3 dots  icon. Then select Rename on the command bar. In the Rename dialog box, type the new name into the field, and then click CONFIRM






## Deleting/ removing document

Select the document you want to remove. Click 3 dots  icon and select the bin icon on the command bar to remove the document. In the remove confirmation dialog box, click CONFIRM

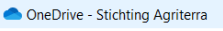


## Coping link

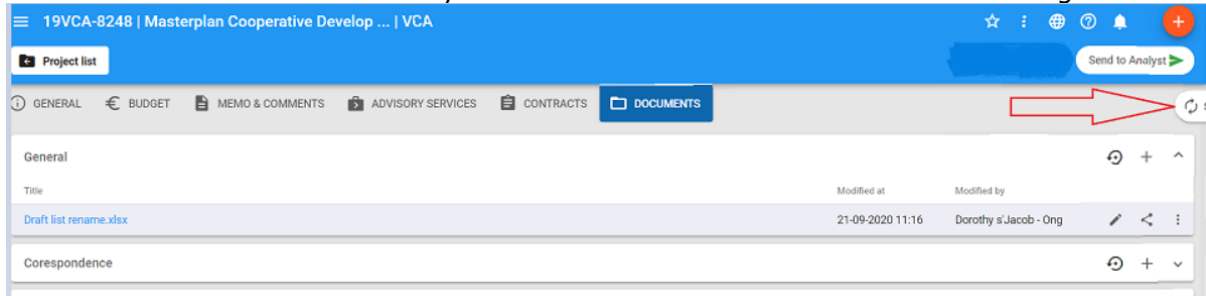
Select the document you want to copy the link. Click 3 dots  icon and select Copy link on the command bar. The link is automatically copied to your clipboard. Paste the link (Ctrl+V) wherever you want, such as a text message, e-mail or on a website.



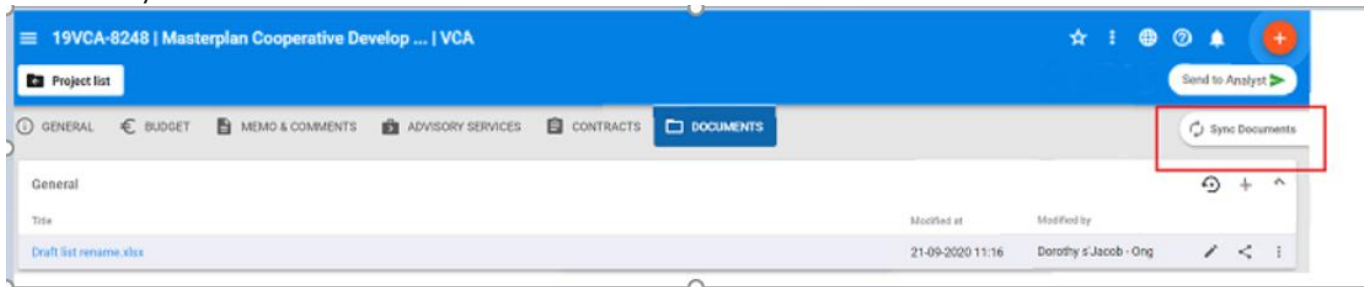
## To make Project library available offline – Sync Project map

OneDrive  must be enabled to use the SharePoint Sync button within AIN. In able to see the sync button, there must be uploaded documents in the default folders of tab Documents.

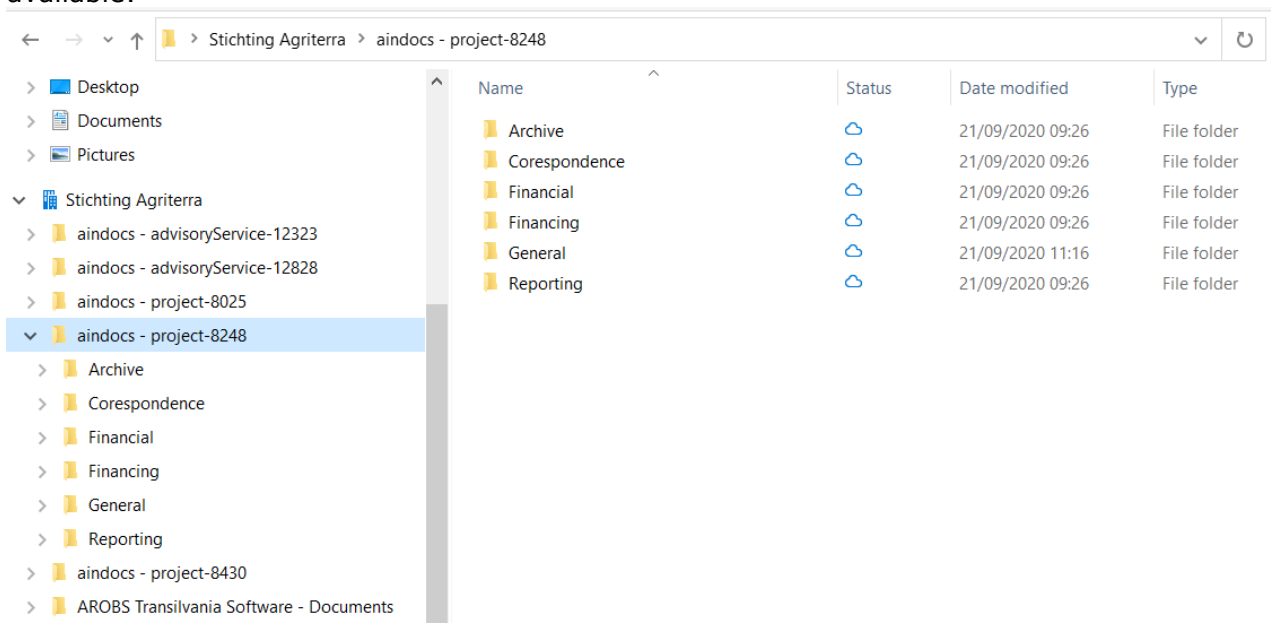
Click on  icon which is the sync button. This will shuffle visible from the right:



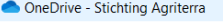
Click on Sync Documents:



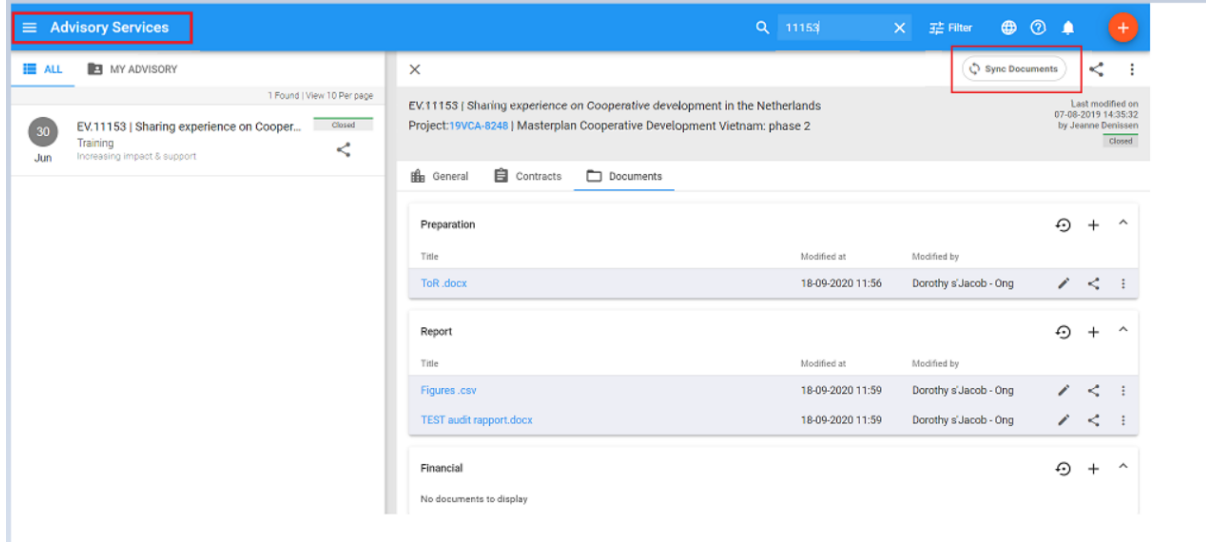
When OneDrive sync update disappears, your offline Project document library is available:



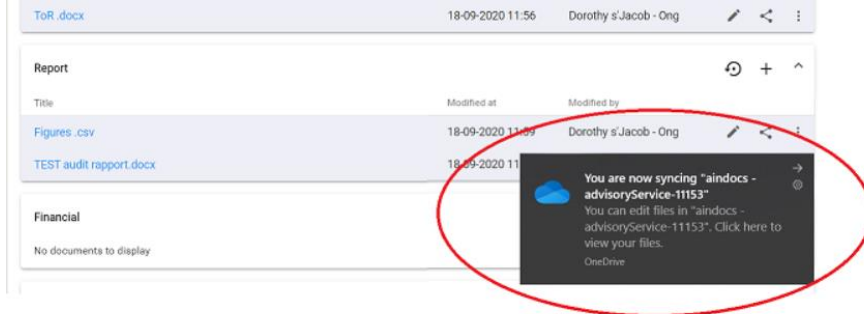
## To make Assignment library available offline – Sync AS/EV, Mission

OneDrive  must be enabled to use the SharePoint Sync button within AIN. In able to see the sync button, there must be uploaded documents in the default folders of tab Documents of Advisory Service.

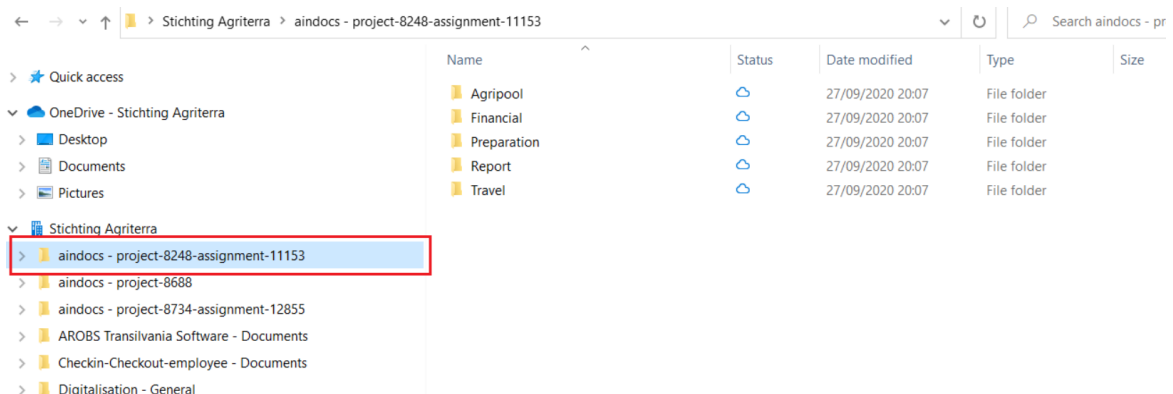
Click on Sync Documents:



OneDrive updates the syncing process:



When OneDrive update disappears, your offline Advisory Service document library is available:



## Appendix 1. Which documents to put in which foldermap?

### Foldermap of Organisations

<b>General</b>	
<b>Formal documents</b>	Proof of legal personality/certificate of registration, By-laws, Audited Reports, Business Plans, Strategic Plans
<b>Profiling</b>	Scoping and company assessment reports, Health checks
<b>Travel</b>	
<b>AgriPool</b>	
<b>Evaluation</b>	

### Foldermap MBO folder in Organisation

<b>General</b>	
<b>Formal documents</b>	Proof of legal personality, Certificate of registration, By-laws, Business Plans, Strategic Plans
<b>Audited Financial Statement</b>	Audited Reports with year, KPI schedule, Analyse audit
<b>Profiling</b>	Scoping and company assessment reports, Health checks
<b>Travel</b>	
<b>AgriPool</b>	
<b>Evaluation</b>	

### Foldermap of Projects

<b>General</b>	Actionplan, other information
<b>Correspondence</b>	End of project Letter, letters / emails send to the client
<b>Financial</b>	copy of banktransfers, copy of bankstatements from clients
<b>Financing</b>	projectcontracts and annexes per year, bank form, signed projectcontract
<b>Reporting</b>	Year-end Project Audited Action plan, signed annex 1 and 2, financial report checked by analyst, reporting memo

### Default folder of Advisory Services

<b>Preparation</b>	ToR, HFF, RAF, request form assignemt / event
<b>Report</b>	Assignment report
<b>Financial</b>	Mission expense form , budget, transfer invoice, proof of payments, final Invoices
<b>Travel</b>	Contracts, tickets
<b>Agripool</b>	CV expert, evaluation form