

# **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:

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	💼 General 💼 Advisory services 💼 Expert 🛧 Travel 🗋 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

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

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#### 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:

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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 Organisatons are: General – Formal documents – Profiling – Travel – AgriPool – Evaluation

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

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#### **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

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G GENERAL € BUDGET 🖹 MEMO & COMMENTS 🚯 ADVISORY SERVICES 🖨 CONTRACTS 🗋 DOCUMENTS	
Description	General General
Project plan	/ 0

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

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#### 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:

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01 Sep	AS.12838   Test met date Intake / evaluation Financial solidity	Application <	General Contracts	Documents	1
			Start Date	End Date	First day of advisory service

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.

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01 Jan	AS.12849   test startdatum Intake / evaluation Financial solidity	Application	Start Date     05-10-2020     Last day of advisory service     15-10-2020	End Date 15-10-2020 Actual advice days 7	First day of advis 09-10-2020 Manager Uyen Thi To Ng			
			Country	👝 Language	Approach			

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

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09 Sep	EV.12828   Guidance and support f Training Transparancy & accountability	Application	i General 📋 Contracts					
21 Aug	AS.12827   AO COMCACAOT Intake / evaluation Farmer led enterprises	Finished	Preparation No documents to display		•	• -	+	^
20 Sep	EV.12826   Governance and Leader Training Transparancy & accountability	Application	Report No documents to display			<b>⊙</b> -	ł	^
05 Oct	AS.12825   Strawberry production d Advice Farmer led enterprises	Application	Financial No documents to display			<b>⊙</b> -	ł	^
24 Aug	AS.12824   Scoping Scoop Konni Intake / evaluation Farmer led enterprises	Application	Travel			<b>⊙</b> -	÷	^
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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** 

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EV.11403 Coaching for VCA master trainers on Strategic Business Plan			×
EV.11405 Coaching VCA advisors on Value Chain analysis reporting			~
EV.11430 Participation and presentation at 02 workshops to share Dutch Coop development experience			~
EV.12296 Equip the Vietnam Cooperative Alliance with knowledge and experiences in cooperative development and management and lessons learned in Netherlands			~
AS.12726 Survey on Agricultural insurance for agri-cooperatives in the North and Center of Vietnam			v
AS.12823 Cooperatives the Solution for Climate Change: cases of Netherlands Cooperatives			×

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

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# **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.

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## 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

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#### 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

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#### 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 CONFRIM

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#### 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

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## 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.

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

OneDrive OneDrive-Stichting Agriterra 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  $\bigcirc$  icon which is the sync button. This will shuffle visible from the right:

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#### Click on Sync Documents:

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

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aindocs - advisoryService-12828	🦲 General	<u>۵</u>	21/09/2020 11:16	File folder
<ul> <li>aindocs - project-8025</li> </ul>	Reporting	6	21/09/2020 09:26	File folder
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#### To make Assignment library available offline – Sync AS/EV, Mission

OneDrive • OneDrive - Stichting Agriterra 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.

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Desktop	Preparation	6	27/09/2020 20:07	File folder	
Documents	📕 Report	6	27/09/2020 20:07	File folder	
Pictures	🣜 Travel	6	27/09/2020 20:07	File folder	
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# **Appendix 1. Which documents to put in which foldermap?**

## Foldermap of Organisations

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

# Foldermap MBO folder in Organisation

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

# Foldermap of Projects

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

## Default folder of Advisory Services

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