

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

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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

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Renaming document

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Deleting/ removing document

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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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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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| > 📕 AROBS Transilvania Software - Documents | | | | | |
| > 📕 Checkin-Checkout-employee - Documents | | | | | |
| > 📙 Digitalisation - General | | | | | |

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 |