

Assistance Software

# User manual

Assistance PSO – SharePoint Replicator

Version 1.2

***For Windows 2000 / XP / Vista***

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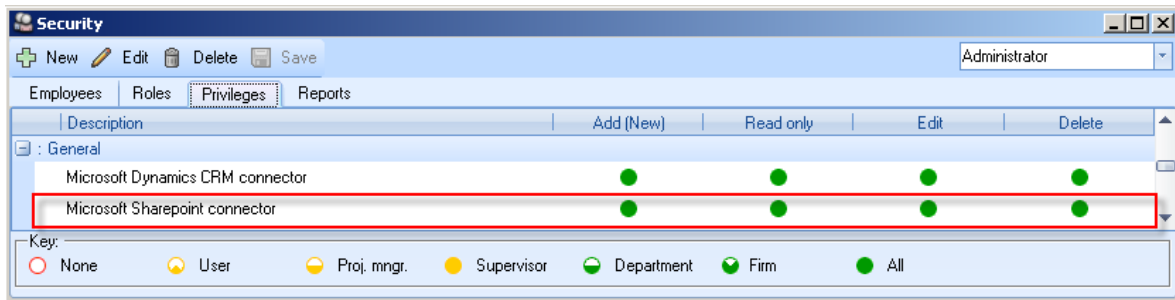
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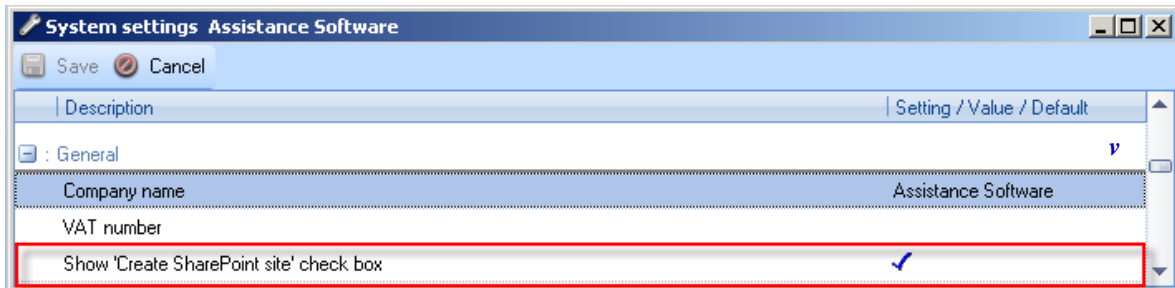
# 1 - INTRODUCTION

This is the user manual for the replicator that automatically creates a SharePoint site in Microsoft SharePoint from Assistance PSO. This replicator automatically creates sites from account, employee and project records in Assistance PSO.

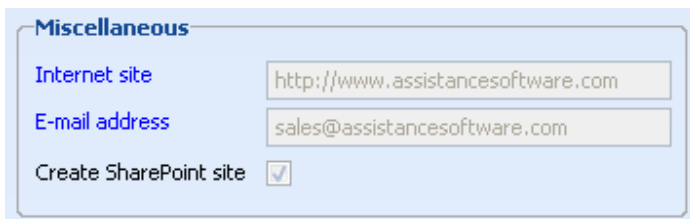
To use this replicator, activate (check) the setting *"Microsoft SharePoint connector"* in Assistance PSO, via menu: System management > Security (Roles & Privileges) > tab Privileges > General:



There is a setting for the replication to automatically create a site for each account, employee and project. There is also an option to decide to do this per account or project, however. If the replicator is to be controlled 'manually', activate (check) the setting *"Show 'Create SharePoint site' checkbox"* in Assistance PSO, via menu: System management > System settings > General system settings > General:



When this setting is activated, both the *account* screens (main form) and the *project* screens (main form) show a checkbox for creating SharePoint sites. Checking this box creates an account site or a project site. A project site can only be created if an account site already exists for the client of the project (i.e. the account in question).



## 2 - THE REPLICATION

### Description of the replication

Please find an explanation of how to use the replication to SharePoint below. Creating a site takes place either in the background or through checking the applicable box. The site itself is created from a standard template, but can also be adjusted to a company-specific lay-out by a technical SharePoint specialist.

The generated SharePoint site is linked to an account, employee and/or project record in Assistance PSO. This site can be reached both directly (intranet address) and through the **SharePoint** tab on the account, employee and/or project record in Assistance PSO.

### SharePoint site for an account:

For the replication of a SharePoint site from an account record in Assistance PSO the account number is used.

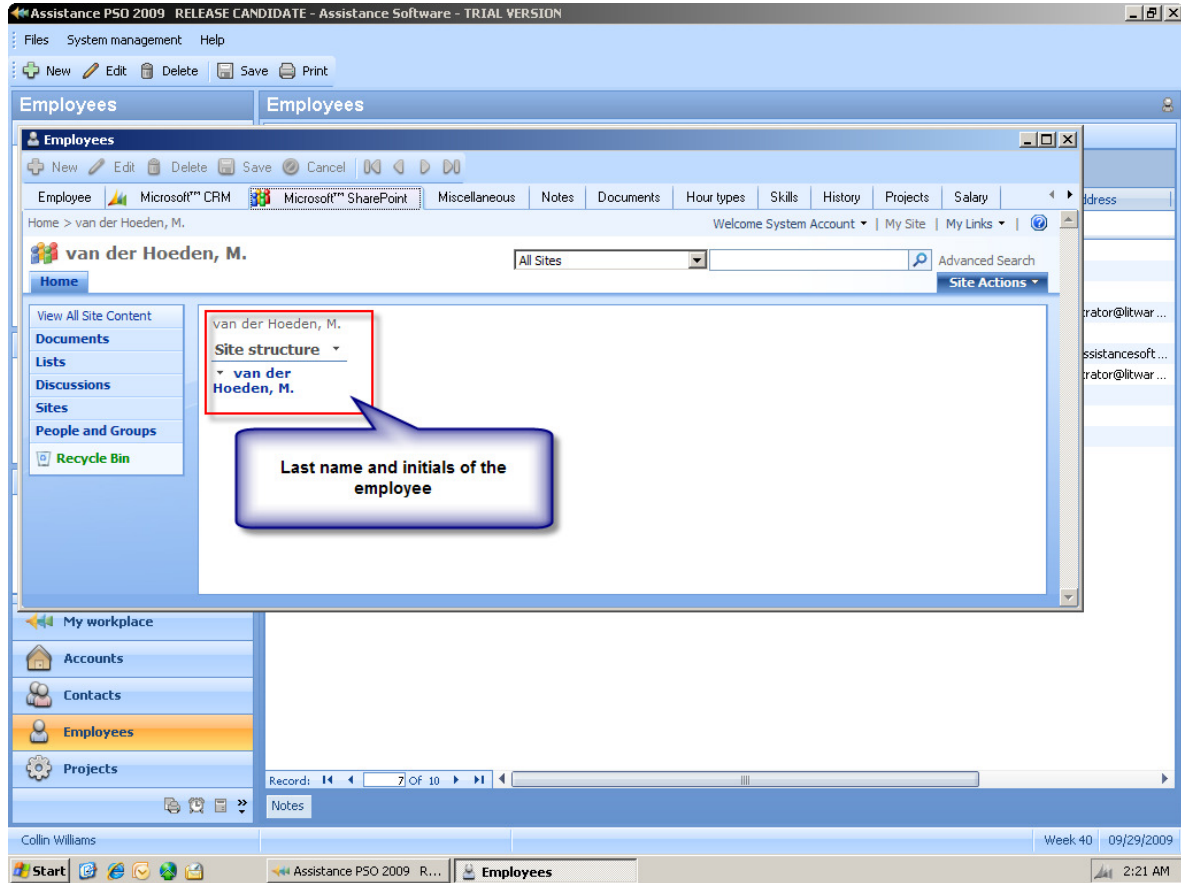
The screenshot displays the 'Account - details' window in Assistance PSO 2009. The interface includes a menu bar (Files, System management, Help), a toolbar (New, Edit, Delete, Save, Cancel), and a navigation pane on the left with sections like Documents, Lists, Discussions, Sites, and People and Groups. The main content area is divided into several sections:

- Site structure:** A tree view showing the account hierarchy. A red box highlights the 'Assistance Software' folder, which contains sub-items like '2008005 / Interim Management IT Services' and '2008007 / AX 4.0 Upgrade naar AX 2009'. A callout bubble points to this section with the text: "Account name and projects for this account in Assistance PSO".
- Documenten UIT:** A table listing documents with columns for Type, Name, and Modified By. The table contains several entries, including 'PP-090417-014', 'PP-090417-011', 'PP-090417-004', 'PP-090417-003', 'APRA Contract v1.0', and 'PP-090409-002 Demo Brief'. A callout bubble points to this section with the text: "Company contact information".
- Documenten IN:** A table listing documents with columns for Type, Name, and Modified By. It contains one entry: 'ScanConnect - Brochure'.
- Links:** A section for managing favorite links, currently empty.
- Contacts:** A table listing contacts with columns for Last Name, First Name, Business Phone, and Email Address. A red box highlights the contact 'van der Hoeden, Martijn' with phone number '+31 (0) 357503538' and email 'administrator@ftwareinc.com'. A callout bubble points to this section with the text: "Contacts with this account".

The bottom of the window shows the Windows taskbar with the Start button, system tray, and taskbar buttons for 'Assistance PSO 2009 R...' and 'Account - details'. The system clock shows 'Week 40 09/29/2009 1:57 AM'.

## SharePoint site for an employee:

For the replication of a SharePoint site from an employee record in Assistance PSO the employee code is used.



## SharePoint site for a project:

For the replication of a SharePoint site from a project record in Assistance PSO project number is used.

The screenshot displays the Assistance PSO 2009 interface. The top window shows the 'Projects' section with a sub-window for '2008003 Consultancy Deployment Windows Server 2008'. The main window shows the SharePoint site structure for this project. A callout points to the site name '2008003 / Consultancy Deployment Windows Server 2008' with the text: 'Account name of the client, current project and other projects for this client'. Another callout points to the 'Contacts' section, which lists 'Grohmüller Anette' and 'Keinessink Mark', with the text: 'Project associates (your contacts who work with you on the project)'. The interface also shows document libraries for 'Documenten IN' and 'Documenten UIT', and a 'Recycle Bin' link.

For a technical description of the replicator and its installation, please refer to the technical documentation (SharePoint Replicator Installation documentation). For further information about SharePoint, please refer to the Microsoft SharePoint user manual.