

Whitepaper



OPC Foundation SharePoint

Participants User Guide

OPC Foundation

April 1, 2014

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SharePoint Collaboration

The OPC Foundation collaboration tool is SharePoint online and is used by all working groups. Everybody must abide by rules and policies of the OPC Foundation and maintain a professional demeanor.

ALL Working Group participants MUST agree to and abide by the [OPC Foundation IP Policy](#).

ALL Working Group participants should use accounts that are linked with their corporate email.

Read this document carefully as it explains how to access a repository and how to maximize your usage.

SharePoint Requirements

Any modern (2014) browser is all that is required to connect to:

<https://opcfoundation.sharepoint.com/>

If you received an invitation email to join a group then simply click the link within it to get started.

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SharePoint Welcome Site

A public site that lists available OPC Foundation working group repositories is available here:

<https://opcfoundation-public.sharepoint.com/>



Requesting Access to a Site

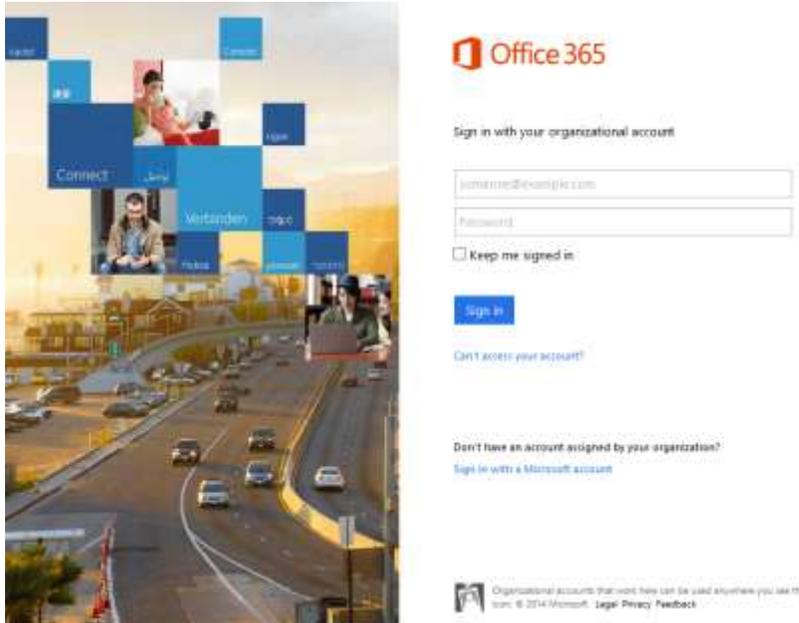
1. Click on the repository you wish to join, e.g. CMP (<https://opcfoundation.sharepoint.com/CMP>)
2. Upon entering a site you may be prompted to login (see *Login* on page 6), or if you are already logged-in then you will be requested to specify why you want access to the site. Simply complete the form and hit “Send”:

Let us know why you need access to this site.

3. You will see an “Awaiting approval” message.
4. An email is sent to the working group team leader for review and approval.

Login

1. Any Microsoft-linked account is all that is necessary to login. This means that your login could be your company email address that is linked to a Microsoft account:



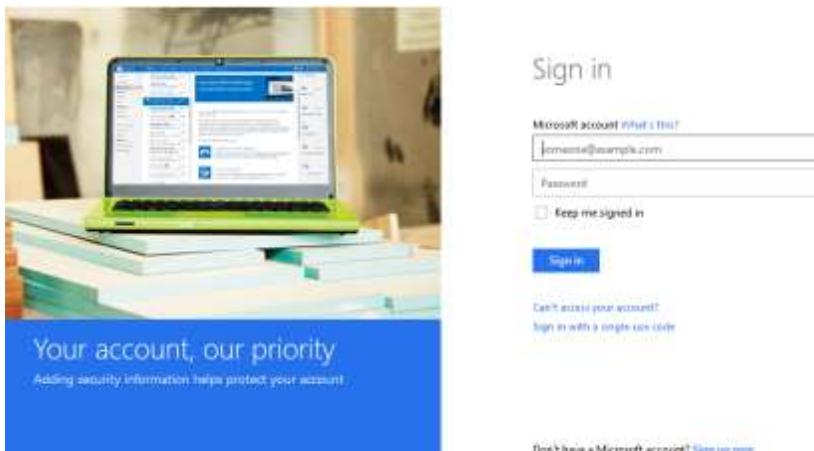
2. Click on the “Sign in with a Microsoft account” link at the bottom of the login page:

Don't have an account assigned by your organization?

Sign in with a Microsoft account

If you do not have an account then please review the next section *New Account* on page 7.

3. You will see a different login screen where you can enter your Microsoft account information:



New Account

If you do not have a Microsoft-linked account then you can create one from as follows:

1. Follow steps #1 through 3 on page 6.
2. Click on the link “Sign up now” near the bottom of the screen:

Don't have a Microsoft account? [Sign up now](#)

3. Simply complete the form and follow the process:

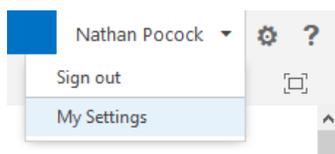


The screenshot shows the Microsoft account creation page. At the top, it says "Microsoft" and "Create an account". Below that, it states: "You can use any email address as the user name for your new Microsoft account. If you already sign in to a Windows PC, tablet, or phone, Xbox Live, Outlook.com, etc., you can use that email address." The form includes fields for "Name" (First and Last), "User name" (with a note that "nathan.pocock@opcfoundation.org is already set up as a Microsoft account. Try signing in with this email, or choose a different account name."), "Create password" (with a note "8-character minimum; case sensitive"), "Reenter password", and "Country/region" (set to "United States"). A callout box on the right says "Use your email address to sign in".

Modifying Your Profile

Once logged in you can modify your profile to provide information of value for your working group colleagues:

1. Click on the arrow that is beside your name, at the top-right of the screen:



2. Choose “My Settings” to view your profile:

People and Groups ▸ User Information

Close

 Edit Item | My Language And Region | My Alerts

Account	i:0#.f membership live.com#nathanpocock@[REDACTED]
Name	Nathan Pocock
Work email	nathanpocock@[REDACTED]
Mobile phone	
About me	
Picture	
Department	

3. Click on “Edit Item” above the fields to make any changes.

Can't Modify your Profile?

This is because you are currently in a working group as a visitor. Simply switch to a group which are a member of then access your profile for editing.

***Note:** As of June 2014 a bug was introduced into SharePoint which prohibits users from modifying their profile from within SharePoint. The target date for repair is currently unknown.*

SharePoint Navigation

Once you've logged into the working group repository you will be at the "home" page, which may vary depending upon the group. The following resources are available in the navigation menu:

Navigation Link	Description
Home	The main page which describes the working group and provides links to key materials.
Working Group	Links to the WIKI which describes the group, the charter, participants, active projects, processes and procedures used, and any other information of importance. See Other utilities may be available within some working group repositories. Ask the group's team leader for help. Working Group WIKI below.
Current Projects	Links to a specific page which describes the projects currently in progress.
Calendar	Links to the working group calendar where you can see a list of meetings, events, and any face-to-face discussions etc.
Meeting Minutes	Links to the meeting minutes archive.
Shared Documents	Links to all work conducted by the working group which may include preliminary studies, incomplete work, or work that is completely finished etc.

Other utilities may be available within some working group repositories. Ask the group's team leader for help.

Working Group WIKI

The "Working Group" wiki describes the working group and is the responsibility of the group to maintain. The group team leader may elect to control the wiki or allow group members to enhance over time.

Editing content in the wiki is easy. Be sure to review the "How to Use This Library" link visible on the home page. Simply click on the "Edit" link to view the editor. Go ahead and make your changes and then click the "Save" button.

Current Projects

This page describes the projects that the group is currently working on. The level of detail provided here is dependent upon the group, although it is definitely more advantageous to overly document for record-keeping purposes. Since this page is part of the group wiki (see Other utilities may be available within some working group repositories. Ask the group's team leader for help.

Working Group WIKI on page 9) editing is just as simple.

Calendar

The calendar shows your meetings and events. The tool is intuitive to use and very likely requires no description here to explain how to use it. However, it is worth noting the icon “Connect to Outlook” which will integrate the calendar within your Outlook directly and will remind you of meeting and events etc.

***TIP:** Use the “Connect to Outlook” feature to: (a) benefit from outlook reminders (b) overcome a limitation where Time Zones are not [as of July-11] being observed by international users.*

Meeting Minutes

The structure of the meeting minutes may vary from group to group. However, the team leader will likely manage this and will delegate with instructions if necessary.

Shared Documents

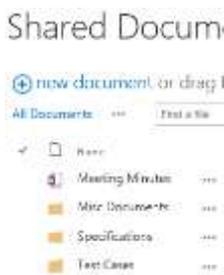
This is a simply file and folder based system. Your working group leader will describe the structure of the file system along with any rules/processes that will be followed.

Downloading Documents etc.

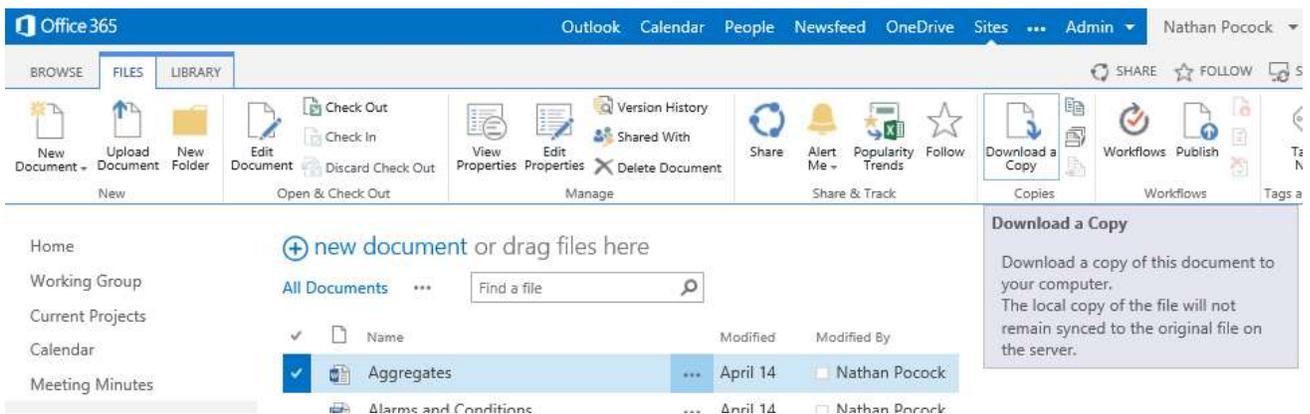
1. All documents are stored in the “Shared Documents” folder which is accessible from the main navigation bar:



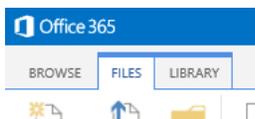
2. Clicking on “Shared Documents” will open the file and folder browser:



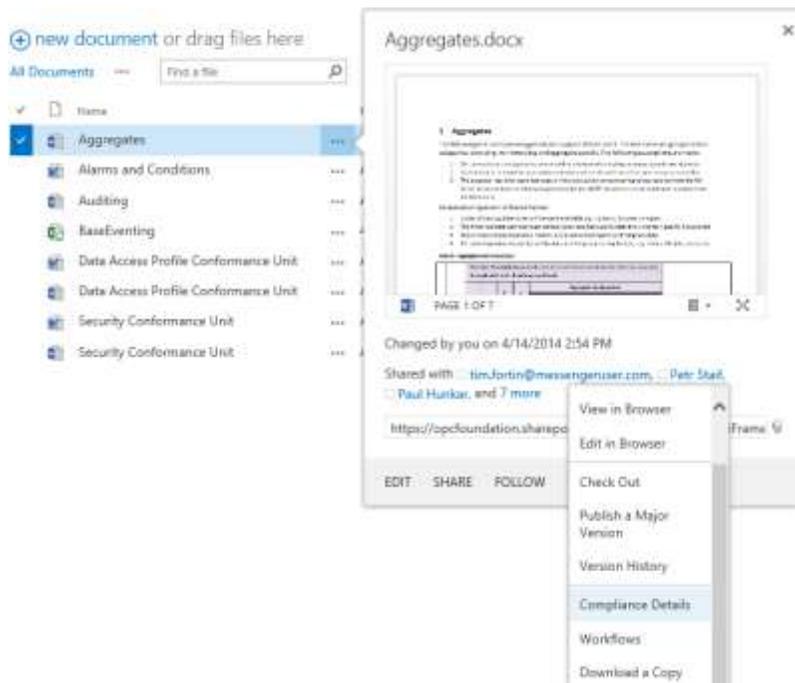
3. To download a document simply locate it, then check the box beside it, and then select “Download a Copy” from the FILES ribbon:



4. To hide the “FILES” ribbon you can simply click the BROWSE option beside it:



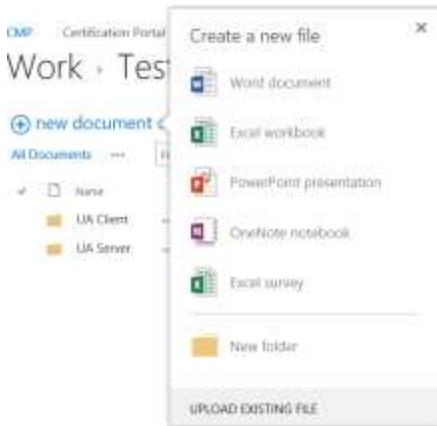
5. Alternatively, you can click the “...” button to view the document details/preview, and then select “Download a Copy” from the next “...” button:



Adding new Content via Office 365

Your working group team leader may have setup access permissions that restrict your ability to add new content.

1. Click on the “Work” link to access the shared file system.
2. Navigate to the directory of choice.
3. Click the “+ new document” link to add a new document and then choose the applicable file-type from the menu:



4. Enter the name of the new document and then click “OK”:

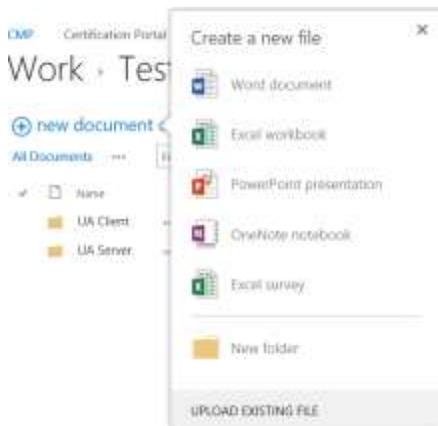


5. Since you are creating a new document the online version of Microsoft Word will open allowing you to create your content in real time.
6. Click “FILE” and then “Exit” to return.

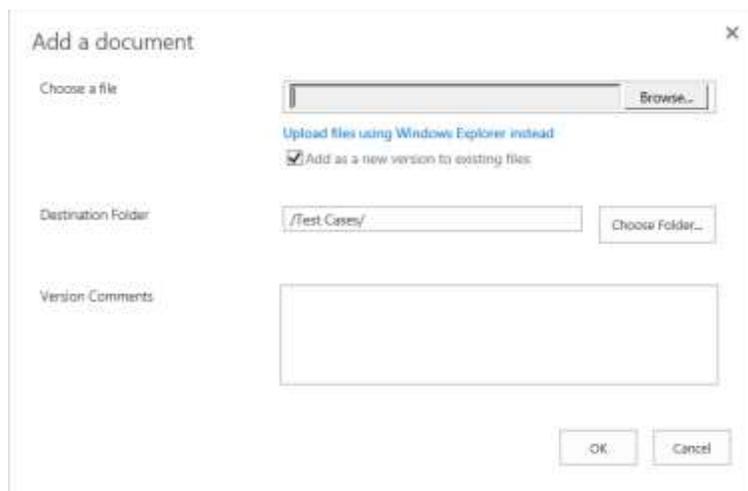
Uploading Existing Content (Documents etc.)

Your working group team leader may have setup access permissions that restrict your ability to upload content.

1. Click on the “Work” link to access the shared file system.
2. Navigate to the directory of choice.
3. Click the “+ new document” link to add a new document and then choose “UPLOAD EXISTING FILE” at the bottom of the menu:



4. You can browse your computer for the file and enter specific version information about this file. Remember: all files have version history, automatically.

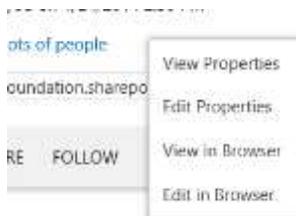


5. Click “OK” to upload your file.
6. Files with the same name can be overwritten safely because history is enabled allowing easy comparison between versions and easy rollback.
7. Anybody who has notifications enabled (see Subscribing for Notifications on page 18) will be notified as appropriate.

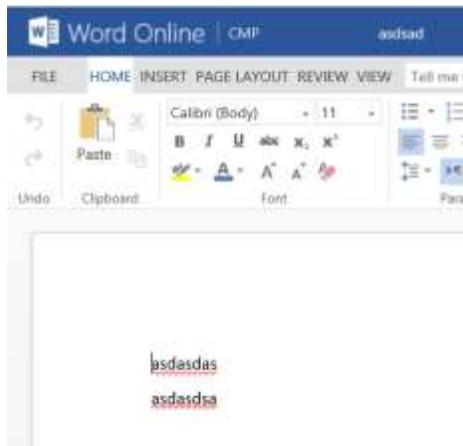
Editing Content

It is possible to edit Word and Excel documents within the browser by using the Office365 suite of tools:

1. Locate the file you wish to edit.
2. Click the “...” button beside the file to launch the menu, and click the “...” within the next screen.
3. Click the “Edit in Browser” option from the menu:



4. Next, you will see your document/spreadsheet in an online version of MS Office:



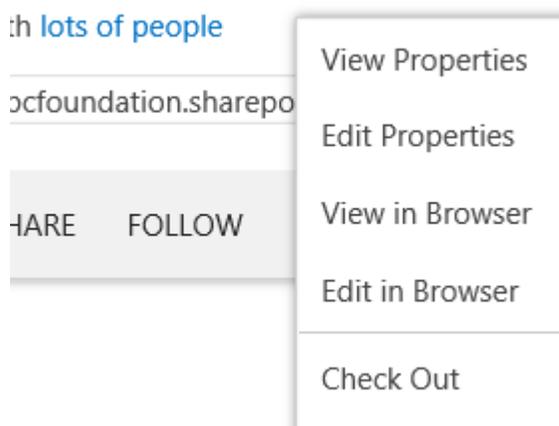
5. When done, you can save and close the file by clicking “Exit” from the “FILE” menu.

In some browsers, you may be able to edit by simply clicking on the file itself without even using the menus.

Check-in/Check-out Content

You can block a file while working on it. This is helpful when you download a file, edit it, and then upload it back to SharePoint. To force this behavior:

1. Locate the file that you will modify.
2. Click the “...” icon to open the file menu and then click the “...” button within the next screen to open the menu:



3. Click the “Check Out” option; the menu will disappear.

The file is now locked to prevent anybody else from uploading to it.

To upload your document simply follow the steps for check-out (see above), except click the “Check In” button which will open this window:

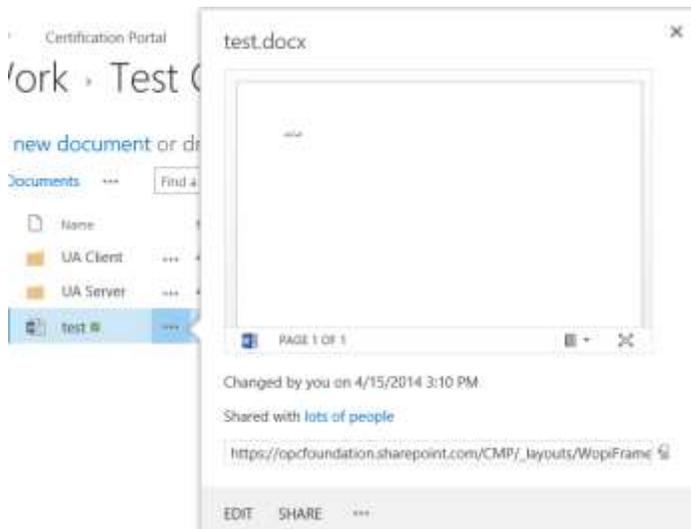
A screenshot of the 'Check in' dialog box in a SharePoint interface. The dialog has a title bar with 'Check in' and a close button. It contains three main sections: 'Version', 'Retain Check Out', and 'Comments'. The 'Version' section has a label 'Select the type of version you would like to check in:' and two radio buttons: '1.1 Minor version (draft)' (selected) and '2.0 Major version (publish)'. The 'Retain Check Out' section has a label 'Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.' and two radio buttons: 'Yes' and 'No' (selected). The 'Comments' section has a label 'Type comments describing what has changed in this version.' and a text area for entering comments. At the bottom, there are 'OK' and 'Cancel' buttons.

Simply complete the form and then click the OK button. The file is now accessible to others for uploading.

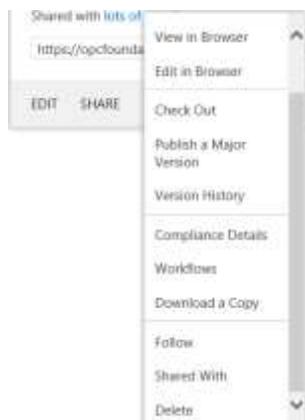
Deleting Content

Your working group team leader may have setup access permissions that restrict your ability to upload content. If you delete content then it is no longer accessible. Talk to your team leader before deleting anything.

1. Click on the “Work” link to go to the shared directory structure.
2. Locate the file or folder you wish to delete.
3. Click on the “...” icon to the far-right of the filename to see a properties dialog:



4. Click the “...” at the bottom of the window to reveal a menu where you will scroll to the bottom and choose “Delete”:



5. Click “OK” when the confirmation prompt appears.
6. Notifications will be sent to anybody with a subscription to content changes, as applicable.

Subscribing for Notifications

You can setup notifications for when content changes, such as:

- Calendar events
- Meeting minutes
- Work (documents) etc.

Creating a New Alert

To setup a notification simply click the “Alert Me” icon in the applicable ribbon (e.g. “CALENDAR” when in the Calendar):

1. Click on the “Alert Me” icon and then click on “Set alert on this list”:



2. A configuration window will open where you can specify the criteria for when to receive notifications. Simply complete the screen as desired and then click the “Save” button at the bottom of the window.
3. If the alert is created successfully, then an email notification confirmation will be sent to you.

Modifying Alert Settings

1. Click on the “Alert Me” icon and then click on “Manage my Alerts”:



2. The next screen is where you can see the list of notifications where you can edit and delete etc.:

My Alerts on this Site ⓘ

 [Add Alert](#) |  [Delete Selected Alerts](#)

Alert Title

Frequency: Immediate

[Calendar](#)

Troubleshooting

Try the following suggestions when experiencing difficulties accessing the site.

SSL Connection Error

Problem: When visiting any SharePoint repository the following error is shown: “SSL connection error”

Cause: Possible incompatibility with SSL version within Internet Explorer.

Resolution: Internet Explorer must be configured to accept SSL 2.0 certificates:



Unable to Modify Profile

Please refer to *Can't Modify your Profile?* on page 8.

That didn't work...

Problem: When visiting any SharePoint repository the following error is shown:

"We're sorry, but <your email> can't be found in the opcfoundation.sharepoint.com directory. Please try again later, while we try to automatically fix this for you.
Here are a few ideas:

Click here to sign in with a different account to this site.
This will sign you out of all other Office 365 services that you're signed into at this time.

If you're using this account on another site and don't want to sign out, start your browser in Private Browsing mode for this site (show me how).

If that doesn't help, contact your support team and include these technical details:

Correlation ID: b7358c9c-33f9-70e4-b9d6-dbalfcdcbe9b

Date and Time: 4/29/2014 10:49:56 PM

URL: https://opcfoundation.sharepoint.com/

User: <your email>

Issue Type: User not in directory."

Cause: You have attempted to access a SharePoint repository using a Microsoft-linked account that is not recognized by SharePoint.

Resolution: You must either (a) request access to join the group (b) contact the Team Leader to request an invitation to join the working group.

Help

If you've followed the information in this guide and still need assistance, then please email webmaster@opcfoundation.org and an OPC Foundation administrator will contact you to assist.



Contact Information:

OPC Foundation

16101 N. 82nd Street, Suite 3B

Scottsdale, AZ 85260

USA

Tel: 480-483-6644

Fax: 480-483-1830

Email: webmaster@opcfoundation.org



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Revision History

Version	Date	Author	Change
1	Apr-28-2014	NP	Initial version.
2	May-7-2014	NP	Improved login/sign-up instructions.
3	Jul-11-2014	NP	Added tip in Calendar section for linking to Outlook.