

OPC Foundation SharePoint

Participants User Guide

OPC Foundation

February 19th, 2018

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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 (2018) 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.

SharePoint Welcome Site

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

<https://opcfoundation-onlineapplications.org/faq/>

Collaboration Projects

Welcome to the [OPC Foundation](#) SharePoint site for [group collaboration projects](#). Access to the SharePoint repositories is restricted to OPC Foundation members only. Membership details [here](#).

Instructions on signing up to SharePoint are [here](#); and a SharePoint Participant's User Guide is [here](#).

Group Name	Short Name	Description	Contact
AutomationML	AML	Responsible for creating a companion specification modeling industry-specific objects using OPC UA.	Matthias Damm
Auto ID	Autoid	Automatic identification of data capture and mobile systems.	Matthias Damm
BACnet	BACnet	Responsible for creating a companion specification modeling BACnet objects using OPC UA.	Matthias Damm
Compliance	CMP	Responsible for defining the OPC Foundation compliance program, test-case authoring, test tool development, and Certification Test Lab rules.	Paul Hunkar
Device Integration	DI	Responsible for creating a companion specification modeling objects for device configuration and integration.	Matthias Damm
OPC Europe	EUR	Responsible for marketing activities across Europe.	Stefan Hoppe
ISA-95	ISA95	Responsible for creating a companion specification modeling objects defined in the ISA-95 specification using OPC UA.	Paul Hunkar
MIMOSA	MIMOSA	Responsible for creating a companion specification.	Paul Hunkar
PackML	PackML	Responsible for creating a companion specification.	Paul Hunkar
Power Generation	PIM	Responsible for creating a companion specification modeling industry-specific objects using OPC UA.	
PLCopen	PLCopen	Responsible for creating a companion specification modeling objects, data-types, and function-blocks using OPC UA.	Stefan Hoppe
Reciprocal Community License	RCL	A special repository for receiving source code updates from OPC Foundation members as part of the RCL license agreement.	Randy Armstrong
Technical Advisory Council	TAC	Oversight committee providing guidance to the OPC Foundation and Working Groups.	Karl-Heinz Deiretsbacher
Unified Architecture	UA	Unified Architecture Group; responsible for the OPC UA technology and specifications, prototyping new technology for incorporating into the UA standard.	Jim Luth
Security	UA Security	Unified Architecture Security Subgroup; responsible for any cyber security issues that affect OPC specifications.	Randy Armstrong
WITSML / ProdML	WITSML	Collaboration with WITSML/ProdML groups to provide a rich information model using OPC UA.	Paul Hunkar
OPC-Japan	OPC-J	OPC-Japan collaboration site	OPCJ Admin
OPC-Japan Board of Directors	OPC-J BOD	OPC-Japan Board of Directors	OPCJ Admin
OPC-Japan Technical Group	OPC-J Tech	OPC-Japan Technical Working Group	OPCJ Admin

Requesting Access to a Site

1. Click on the repository you wish to join, e.g. CMP (<https://opcfoundation.sharepoint.com/UA>)
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.

Type your message here...

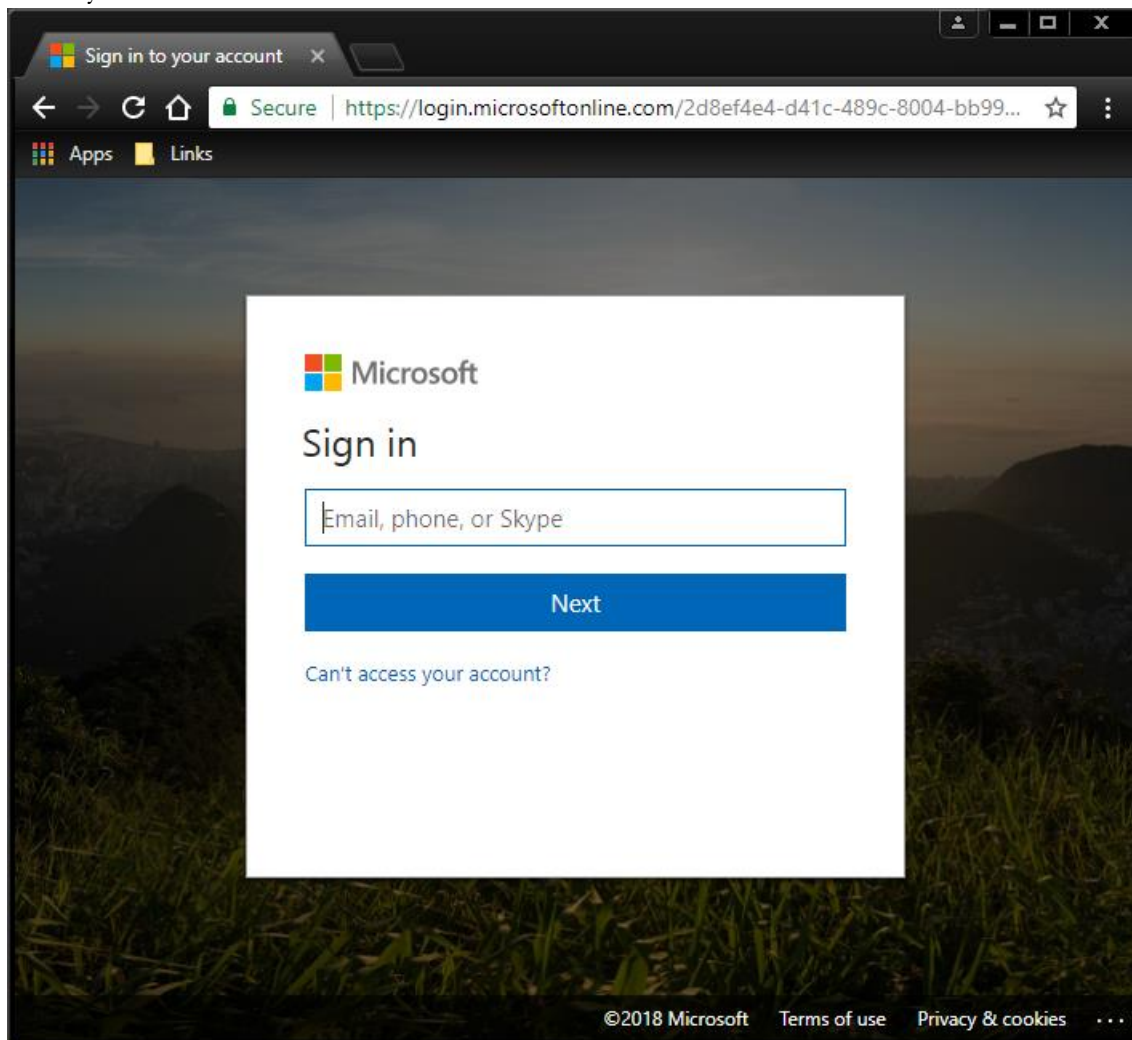
Send request

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

Login

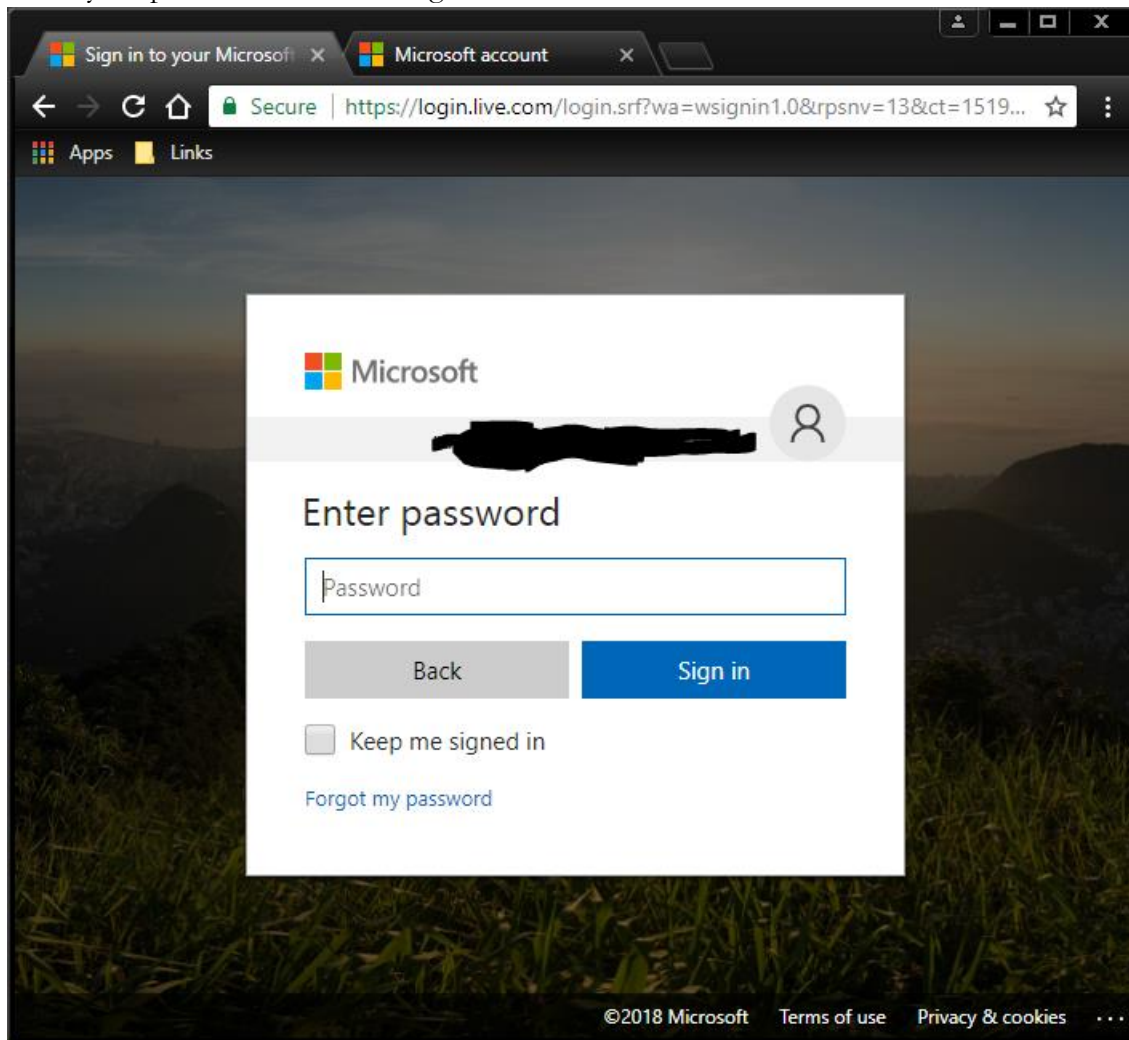
1. Any Microsoft-linked account is all that is necessary to login. This means that your login could be your company email address that is linked to a Microsoft account.

Enter your e-mail address and click “Next”:

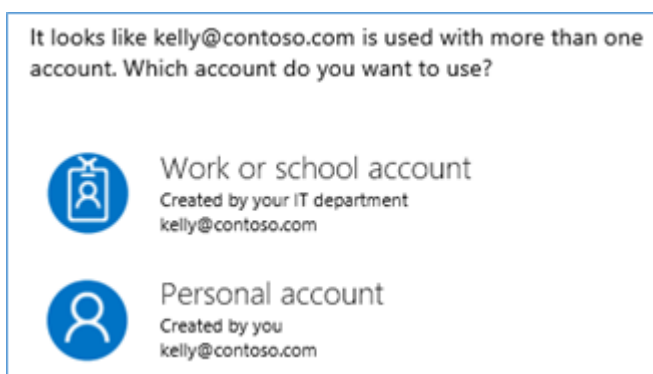


The screenshot shows a web browser window with the title "Sign in to your account". The address bar shows a secure connection to <https://login.microsoftonline.com/2d8ef4e4-d41c-489c-8004-bb99...>. The page features the Microsoft logo and the text "Sign in". Below this is a text input field labeled "Email, phone, or Skype". A blue "Next" button is positioned below the input field. At the bottom of the form, there is a link that says "Can't access your account?". The footer of the page includes the copyright notice "©2018 Microsoft" and links for "Terms of use" and "Privacy & cookies".

2. Enter your password and click “Sign In”:



3. Note that some users will see a screen like this:



If your company uses e-mails that are federated with Azure AD then chose “Work or school account” and log in with your existing corporate email address and password.

If that does not work then try again as a “Personal account”.

If you still have issues please email [sysadmin AT opcfoundation.org](mailto:sysadmin@opcfoundation.org).

New Account

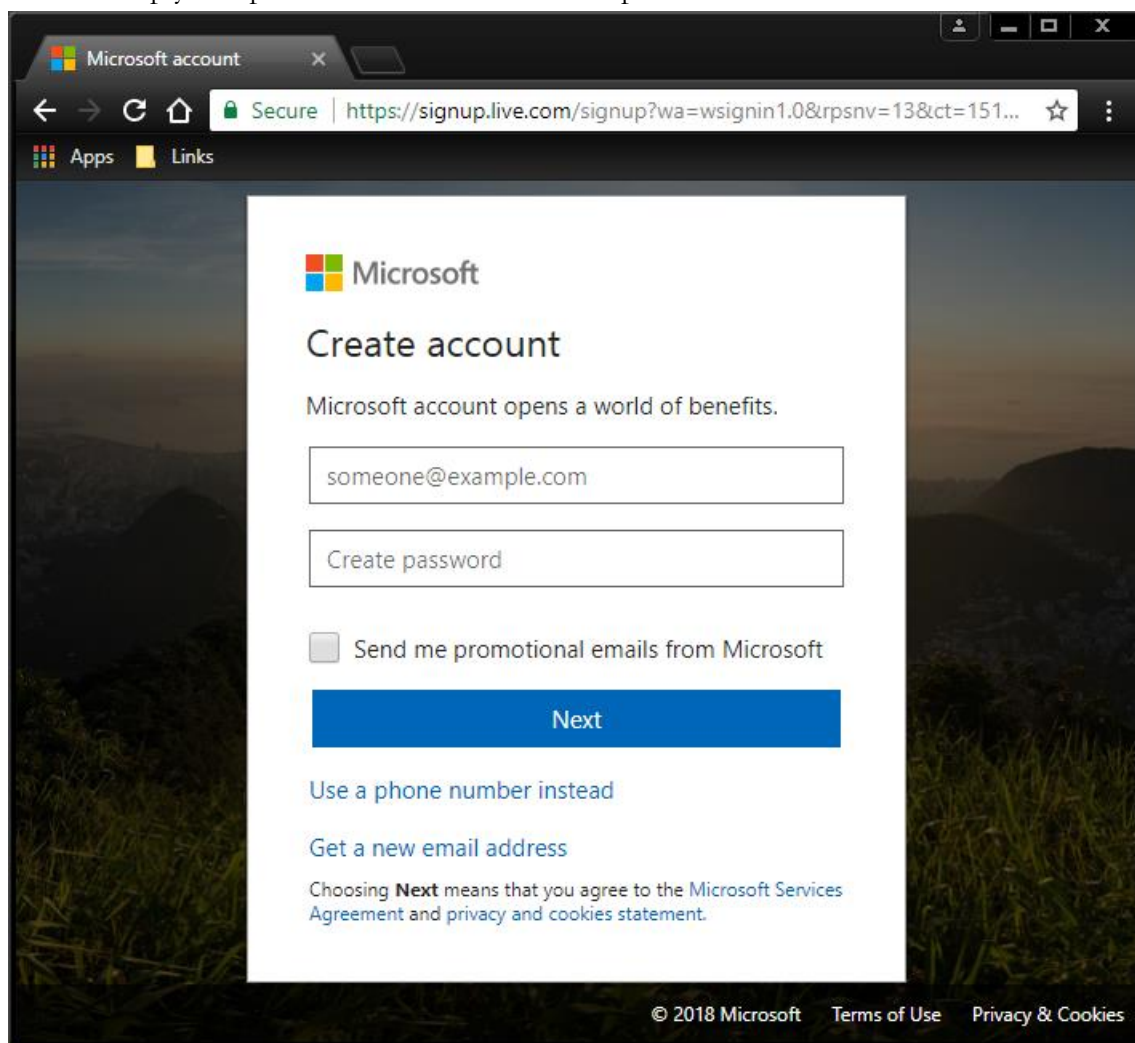
If you do not have a Microsoft-linked account then you can create one from as follows:

1. Follow steps #1 through 3 on page 6.
2. Click on the link “Create one!” near the bottom of the screen:

No account? [Create one!](#)

If the link does not appear try this URL: <https://signup.live.com/signup>

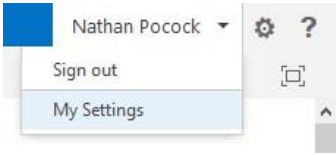
3. Simply complete the form and follow the process:

A screenshot of a web browser window showing the Microsoft account creation page. The browser's address bar displays the URL "https://signup.live.com/signup?wa=wsignin1.0&rpsnv=138&ct=151...". The page features the Microsoft logo at the top, followed by the heading "Create account". Below this, a message states "Microsoft account opens a world of benefits." The form includes two input fields: the first contains the email address "someone@example.com", and the second is labeled "Create password". A checkbox option is present with the text "Send me promotional emails from Microsoft". A prominent blue "Next" button is located below the form fields. At the bottom of the form, there are two links: "Use a phone number instead" and "Get a new email address". A disclaimer at the bottom of the form reads: "Choosing **Next** means that you agree to the Microsoft Services Agreement and privacy and cookies statement." The footer of the browser window shows "© 2018 Microsoft", "Terms of Use", and "Privacy & Cookies".

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 2018 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.

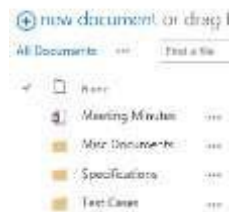
Downloading Documents etc.

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

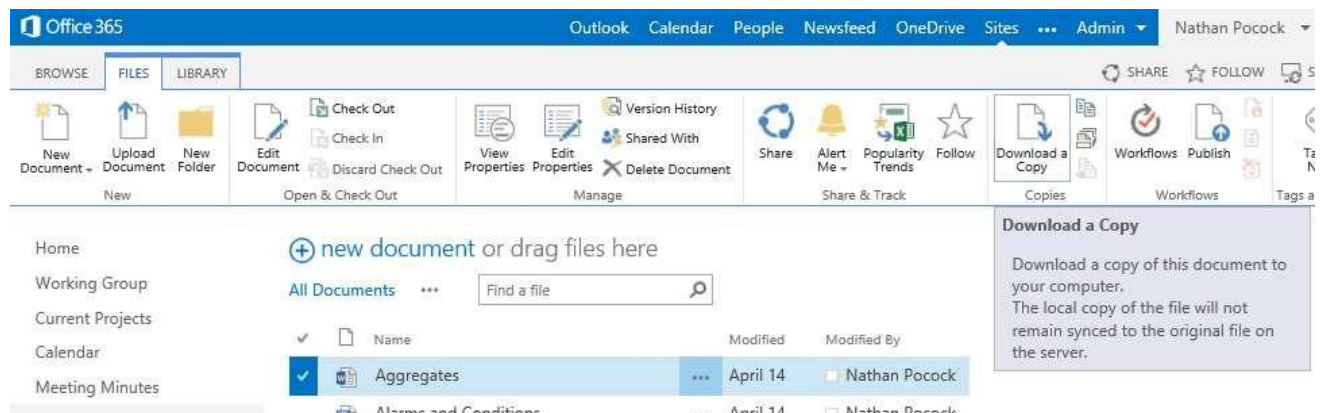


2. Clicking on “Shared Documents” will open the file and folder browser:

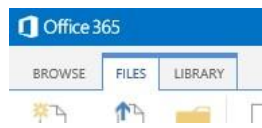
Shared Document



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

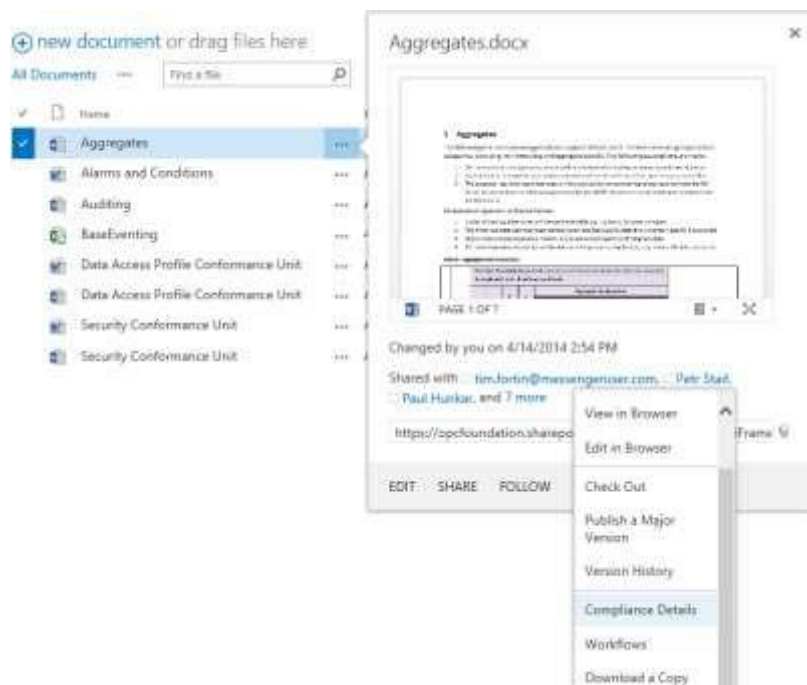


- To hide the “FILES” ribbon you can simply click the BROWSE option beside it:



| Page

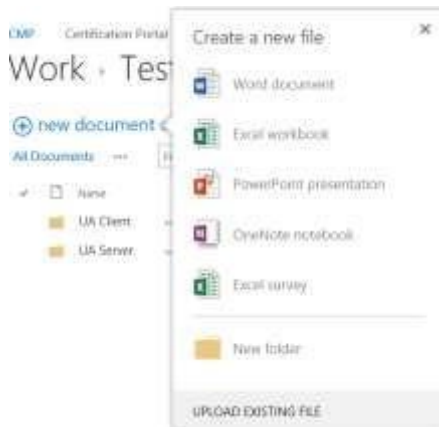
- Alternatively, you can click the “...” button to view the document details/preview, and then select “Download a Copy” from the next “...” button:



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”:

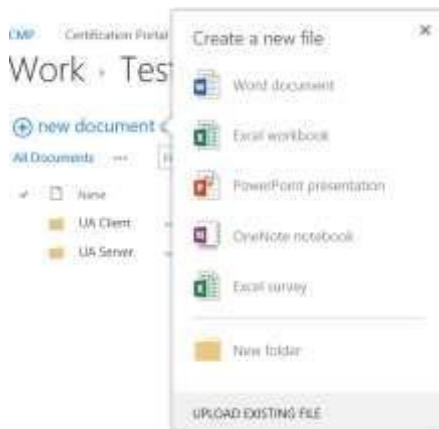


5. Since you are creating a new document the online version of Microsoft Word will open allowing you to create your content in real time.
6. Click “FILE” and then “Exit” to return.

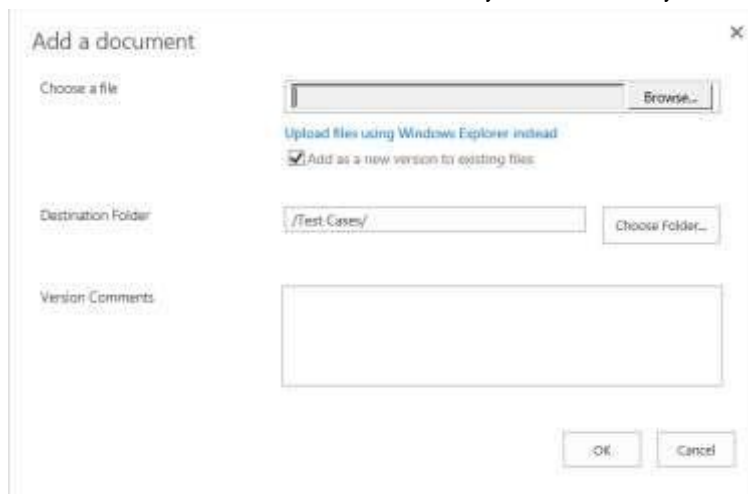
Uploading Existing Content (Documents etc.)

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.

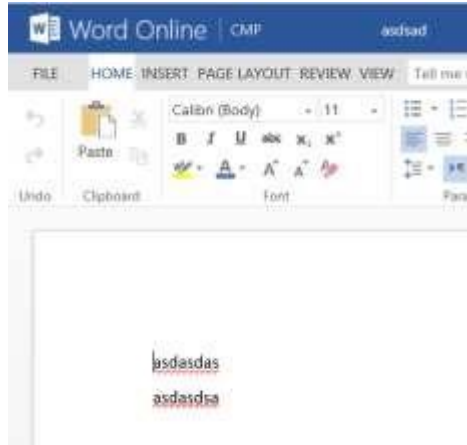
Editing Content

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:



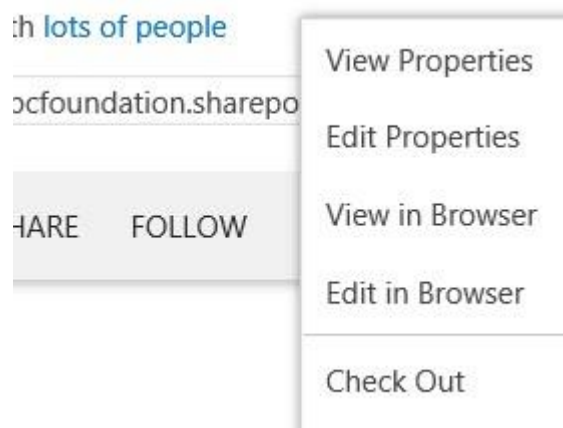
5. When done, you can save and close the file by clicking “Exit” from the “FILE” menu.

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:

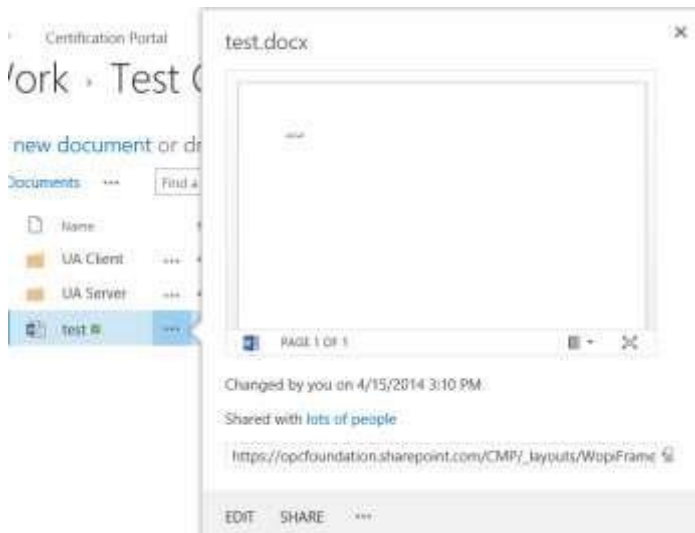
Simply complete the form and then click the OK button. The file is now accessible to others for uploading.

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. “EVENTS” 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-dbalfcdcb9b
Date and Time: 4/29/2018 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-28-2018	NP	Initial version.
2	May-7-2018	NP	Improved login/sign-up instructions.
3	Jul-11-2018	NP	Added tip in Calendar section for linking to Outlook.