

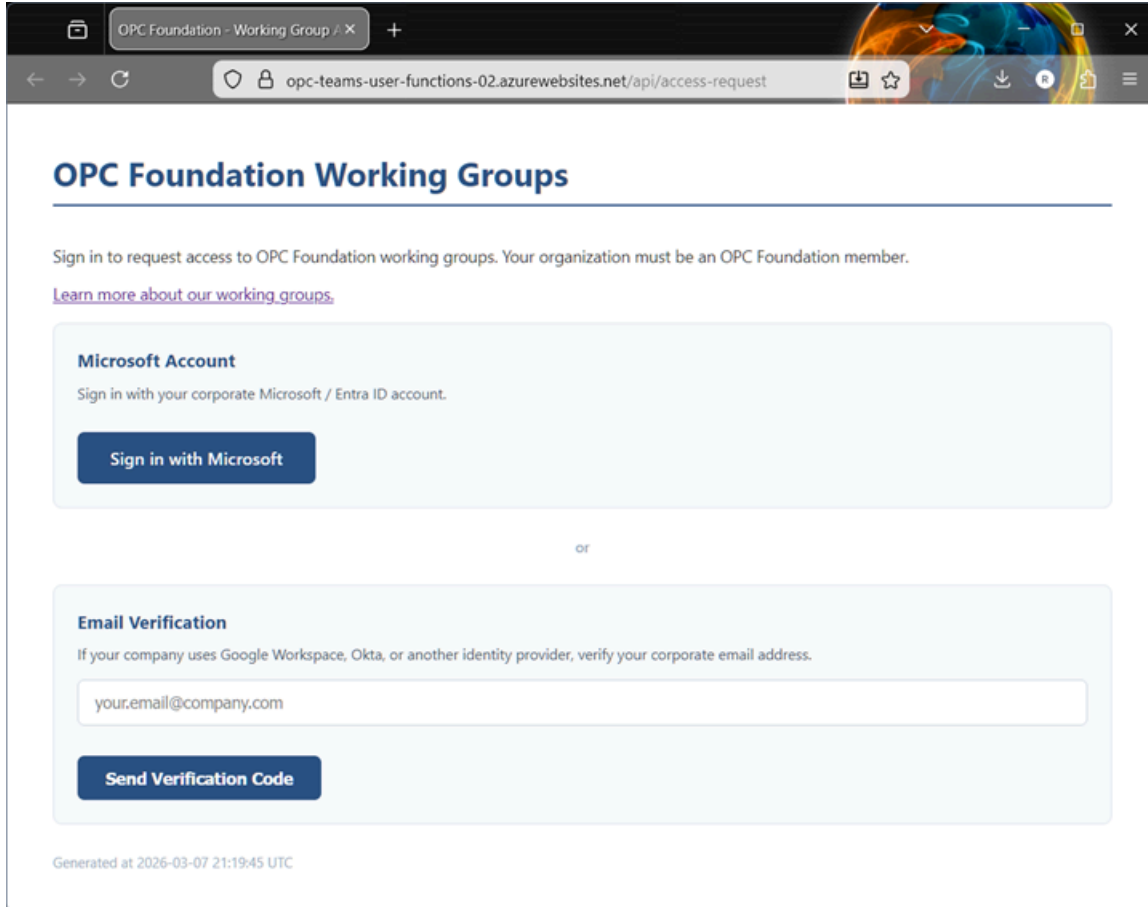
# OPC Working Group Member guide to Teams collaboration

## Joining the Working Group

### Self-Service Access Portal

The OPC Foundation provides a self-service portal where you can request access to working groups without contacting an administrator. The portal is available at:

<https://memberportal.opcfoundation.org/api/access-request>



## Step 1: Sign In

The portal supports two sign-in methods:

- **Microsoft Account** — Sign in with your corporate Microsoft/Entra ID account.
- **Email Verification** — If your company uses Google Workspace, Okta, or another identity provider, enter your corporate email address and a 6-digit verification code will be sent to your inbox.

The system uses the domain in the mail to determine if you are a member or not. For this reason, using generic emails, such as [gmail.com](mailto:example@gmail.com), will not grant you access to working groups.

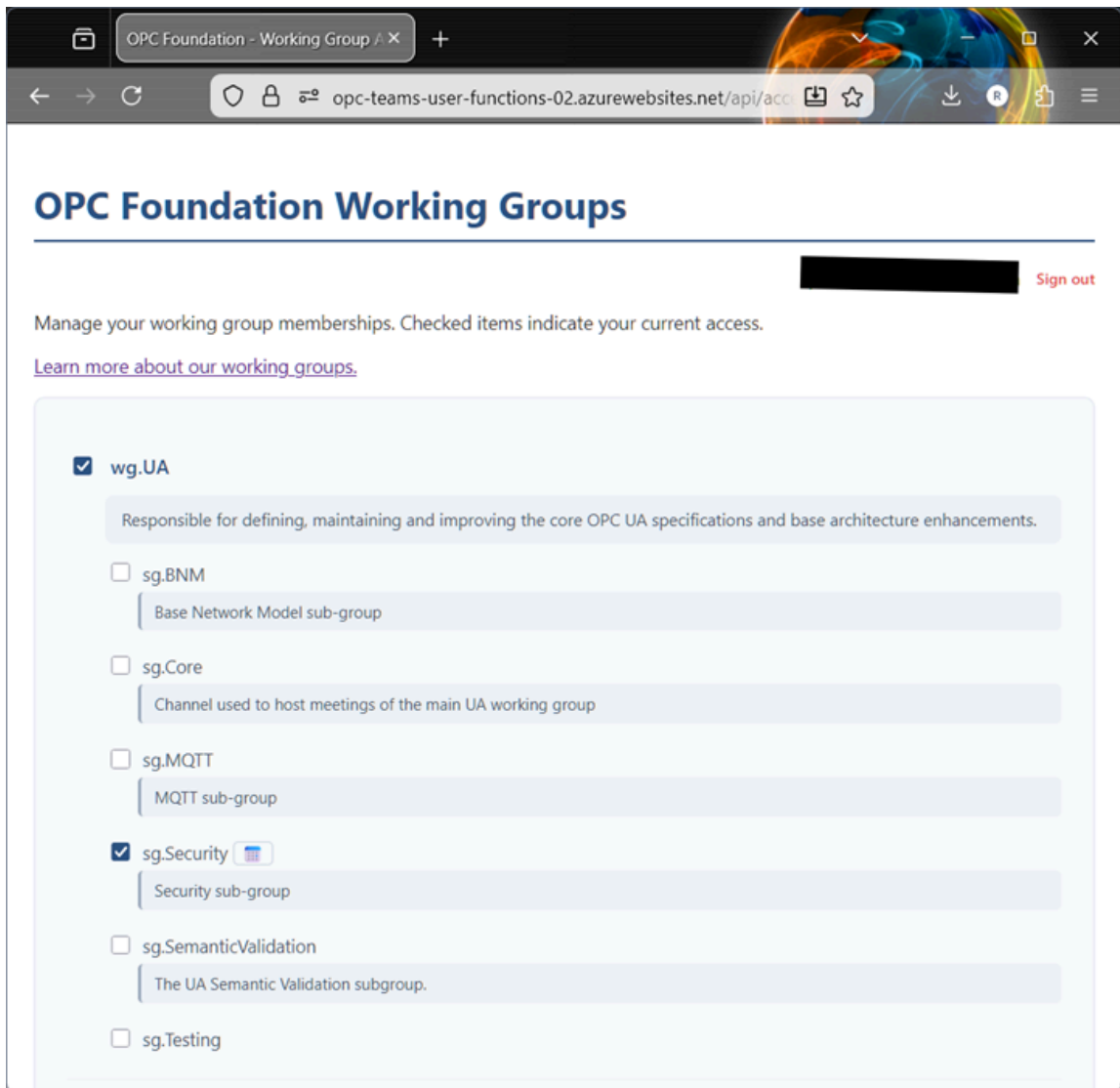
**Note:** Some companies that federate their domain with Microsoft use identities other than their email address as the login for Microsoft 365. For example, at my company John Smith would have the email address [John.Smith@SE.com](mailto:John.Smith@SE.com) but would need to log into Teams and other Microsoft services as [SESA99245@SE.com](mailto:SESA99245@SE.com). In such cases you should request that your Teams invite for the Working Group be sent to the identity you use to login to Microsoft 365 instead of your normal email address.

**Note:** Some companies may block Microsoft SharePoint/Teams tenants unless they are manually allowed. The OPC foundation's tenant is <https://opcfoundation.sharepoint.com> .

## Step 2: Select Working Groups

After signing in, the portal displays a list of available working groups. Your current memberships are shown as checked items.

- Members of OPC Foundation non-logo member companies see all working groups (wg.\*) and joint working groups (jwg.\*).
- Non-members and logo-only members can only access joint working groups (jwg.\*) with approval.
- If you are already a member of a team that has subgroups, the subgroups are shown beneath the team. Check or uncheck subgroups to join or leave their mailing lists.



### Step 3: Submit

Click "Update Access" to apply your changes. The system will:

- Add you as a guest in the OPC Foundation Microsoft 365 tenant (if this is your first time). You will need to accept the invite sent from the system to get access.
- Add you to the mailing lists for each selected working group and subgroup.
- Remove you from any groups you unchecked.

## Approval-Required Groups

Some working groups require administrator or chair approval before you can join. When you select one of these groups, the portal sends an approval request email to the working group chairs on your behalf. You will see an "Approval pending" notice until access is granted.

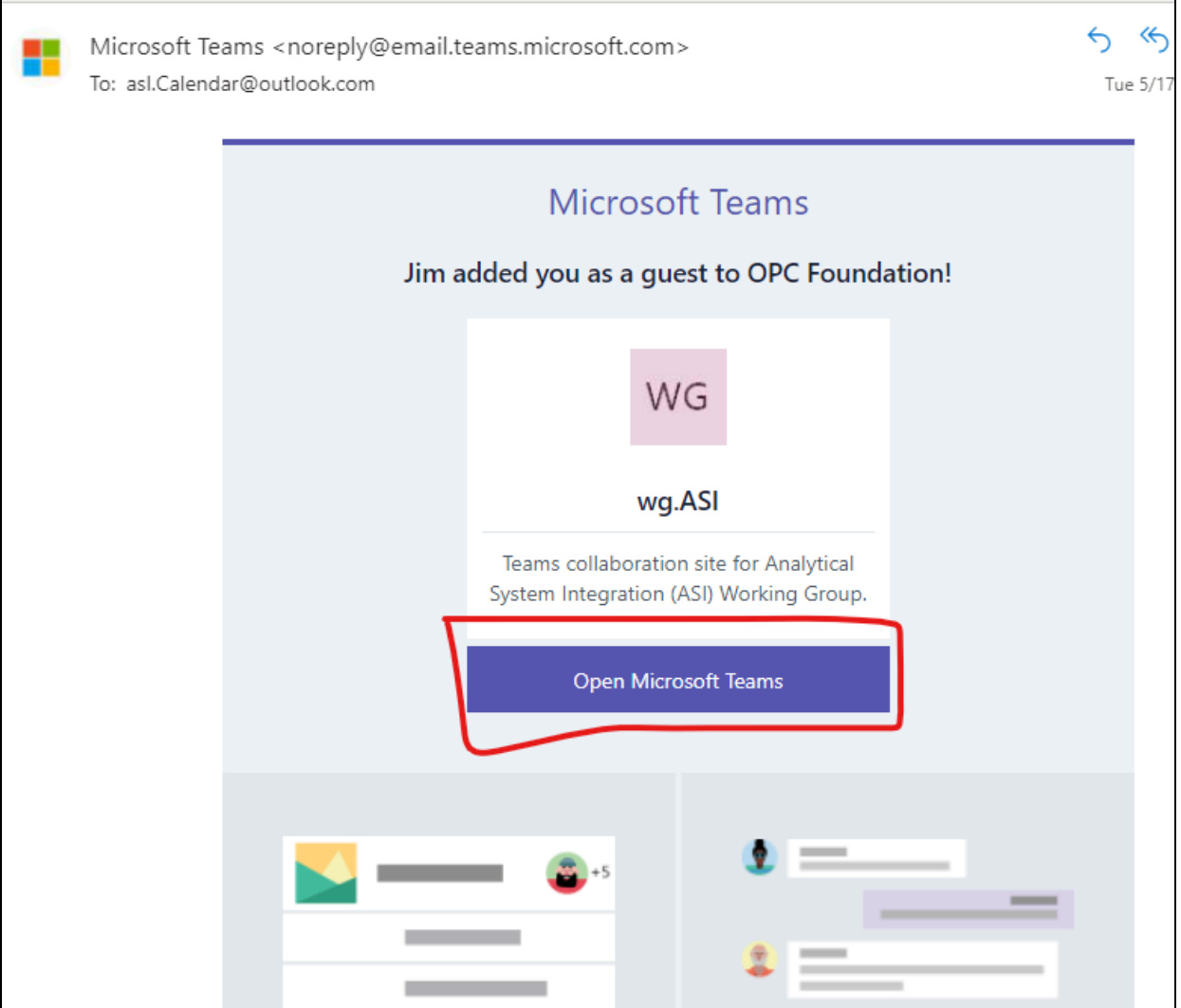
For non-member users, all joint working group requests go through the approval workflow.

Note that even though the system will allow you to send a request with a generic email address, you will likely be asked to send the request again with your corporate email. It is recommended that you use an account that identifies the organization you represent.

## Accepting an Invite

When your request to join has been accepted you will receive an email from Teams like this:

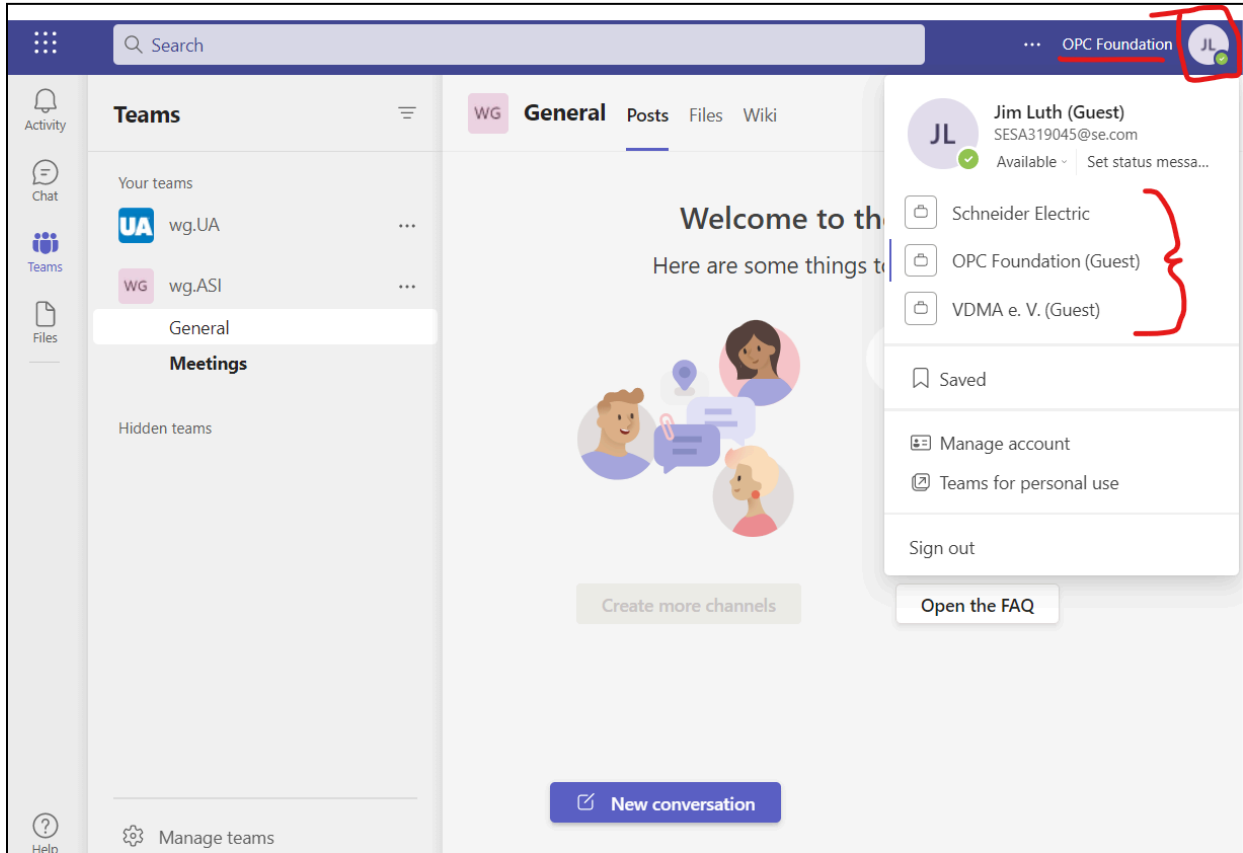
## You have been added as a guest to OPC Foundation in Microsoft Teams



The screenshot shows an email from Microsoft Teams. The header includes the Microsoft Teams logo, the sender's email address (noreply@email.teams.microsoft.com), and the recipient's email address (asl.Calendar@outlook.com). The main content of the email is a notification from Jim stating that the user has been added as a guest to the OPC Foundation. Below this, there is a card for a Teams group named 'wg.ASI'. The card features a pink square with the letters 'WG' and a description: 'Teams collaboration site for Analytical System Integration (ASI) Working Group.' A blue button labeled 'Open Microsoft Teams' is highlighted with a red hand-drawn rectangle. At the bottom of the email, there are two preview images: one showing a calendar icon and a group of five people, and another showing a chat interface with a person's profile and a message bubble.

Click “Open Microsoft Teams” to accept the invite and complete the process of joining the Team.

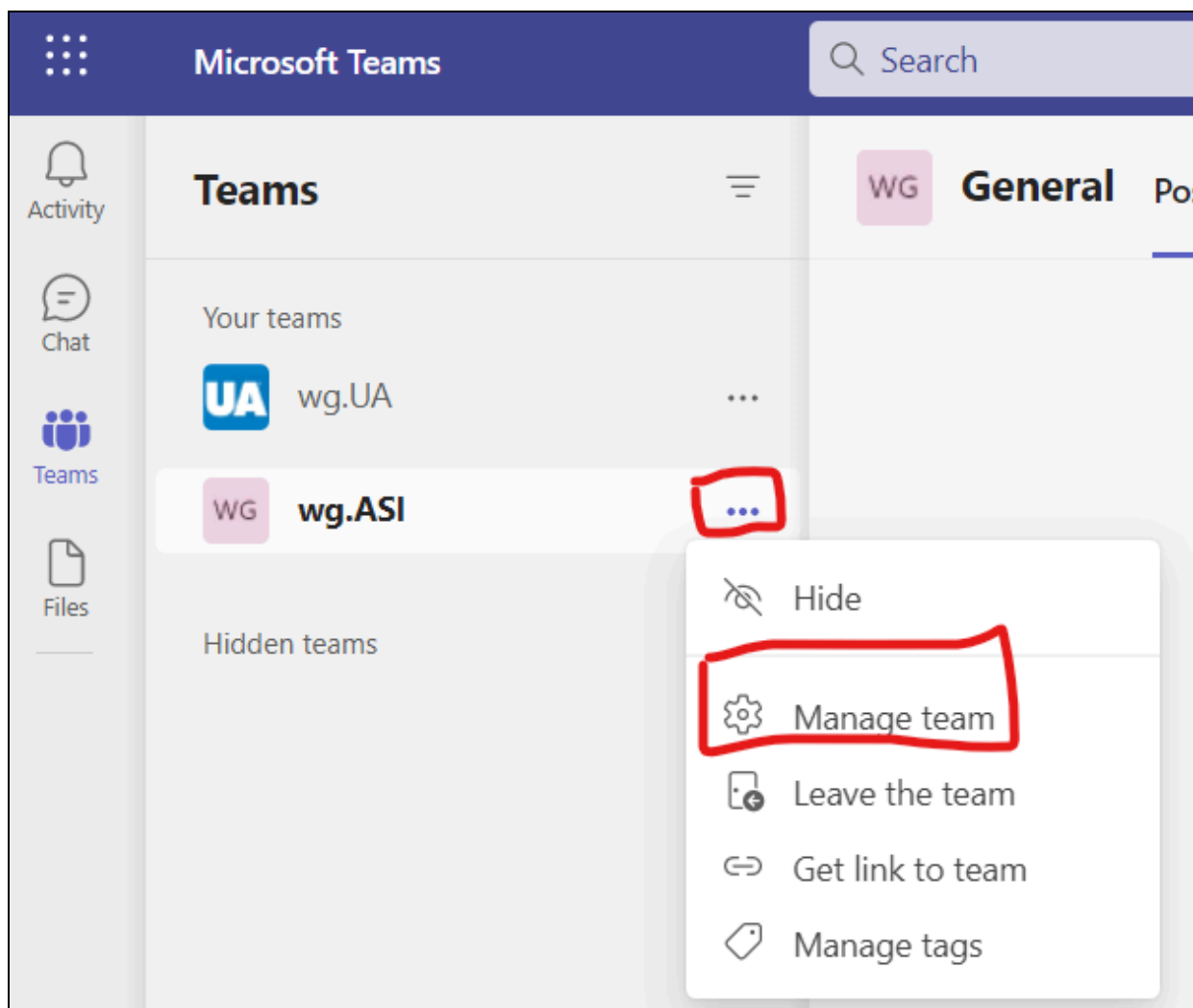
You may use the Teams app (Windows, iOS, Android) for access or just a web browser (<https://teams.microsoft.com>). The functionality is almost identical. In both the browser window and the Teams app, your Teams are grouped by the organization that owns them. You can see the list of organizations that you belong to by clicking your initials in the upper right. Clicking the organization name will change the context of the app to the chosen organization. The current organization context is shown in the text next to your initials.



If you have successfully accepted the invite you will see the “OPC Foundation (Guest)” organization in the list and when selected you will see the OPC Teams which you are a member of.

## Identifying Owners and the Working Group Chair

Select the three dots next to the Team and select “Manage Team”:



The Team Owners are identified at the top of the Members Tab:

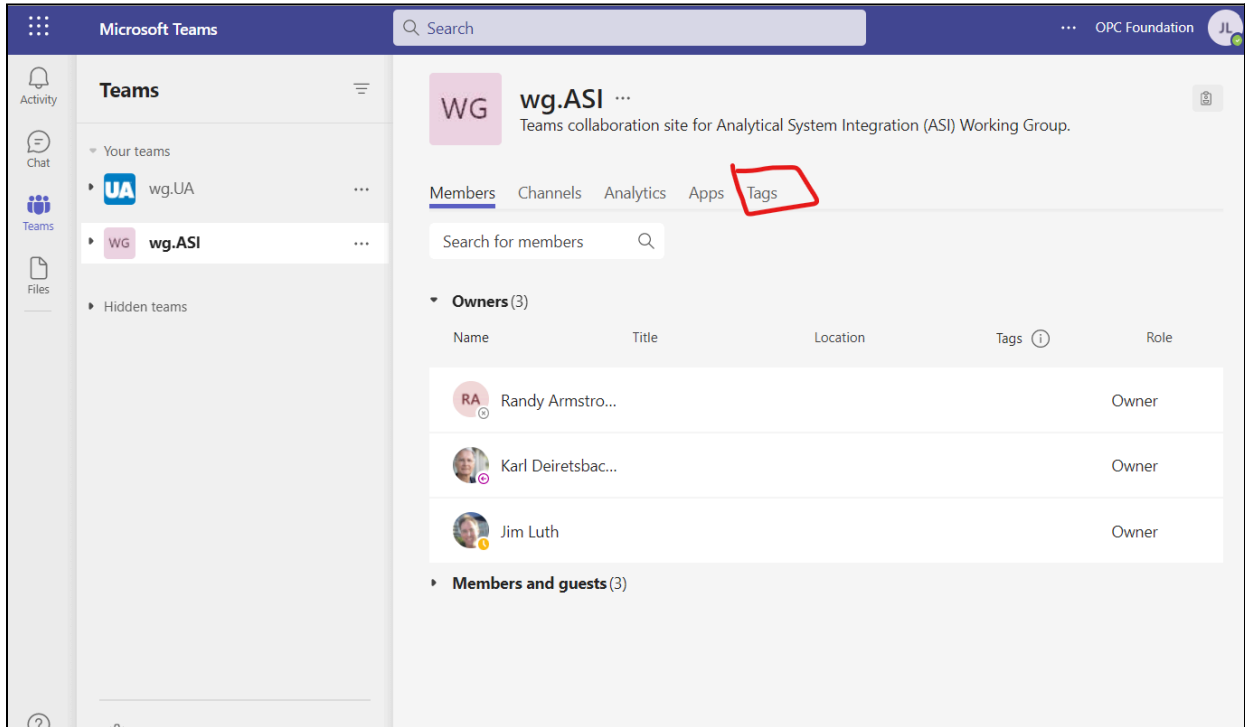
The screenshot shows the Microsoft Teams interface for a team named 'wg.ASI'. The left sidebar contains navigation options: Activity, Chat, Teams, and Files. The main area displays the team's name and a description: 'Teams collaboration site for Analytical System Integration (ASI) Working Group'. Below this, the 'Members' tab is selected and highlighted with a red box. A search bar for members is present. Underneath, the 'Owners (3)' section is highlighted with a red box. A table lists the owners:

Name	Title	Location	Tags	Role
Randy ...				Owner
Karl De...				Owner
Jim Luth				Owner

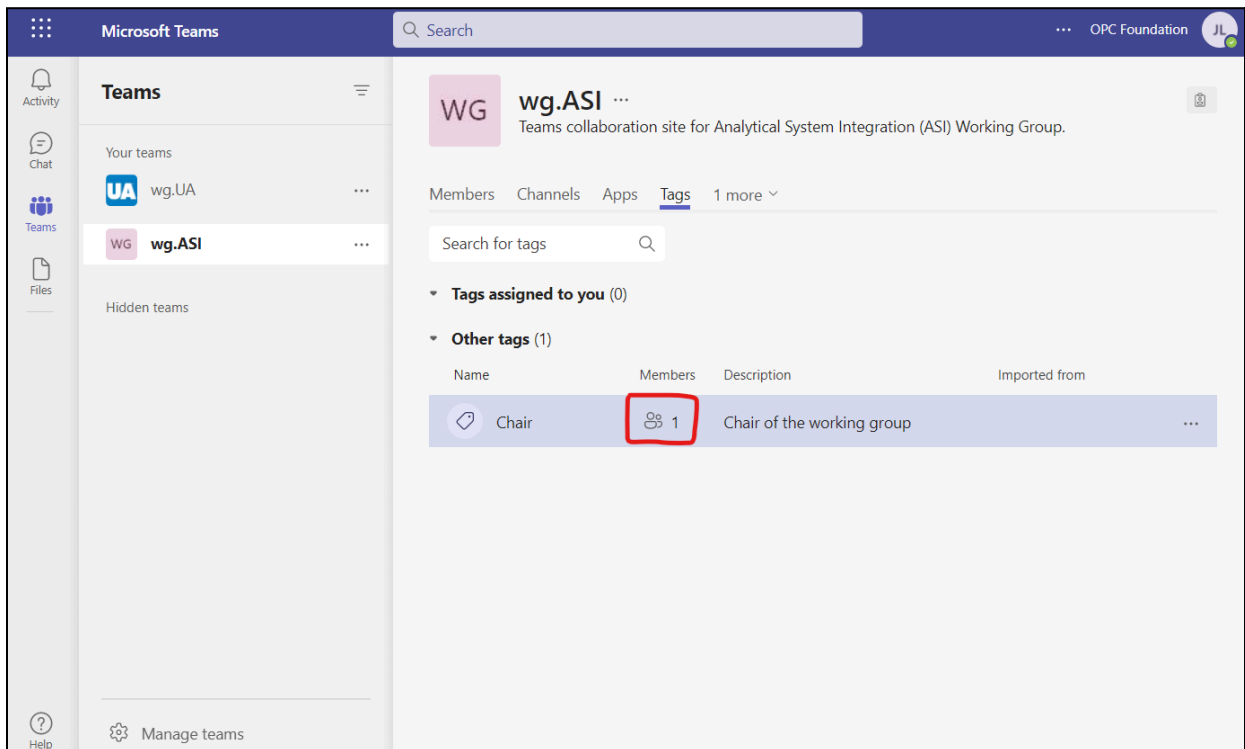
Below the table, there is a section for 'Members and guests (3)'.

**Note:** In most cases as a Working Group member you should be corresponding with the Working Group Chair, **not the Team Owner(s)**. The Chair will notify the Owner(s) on your behalf if need be.

To identify the Chair, click the “Tags” Tab:



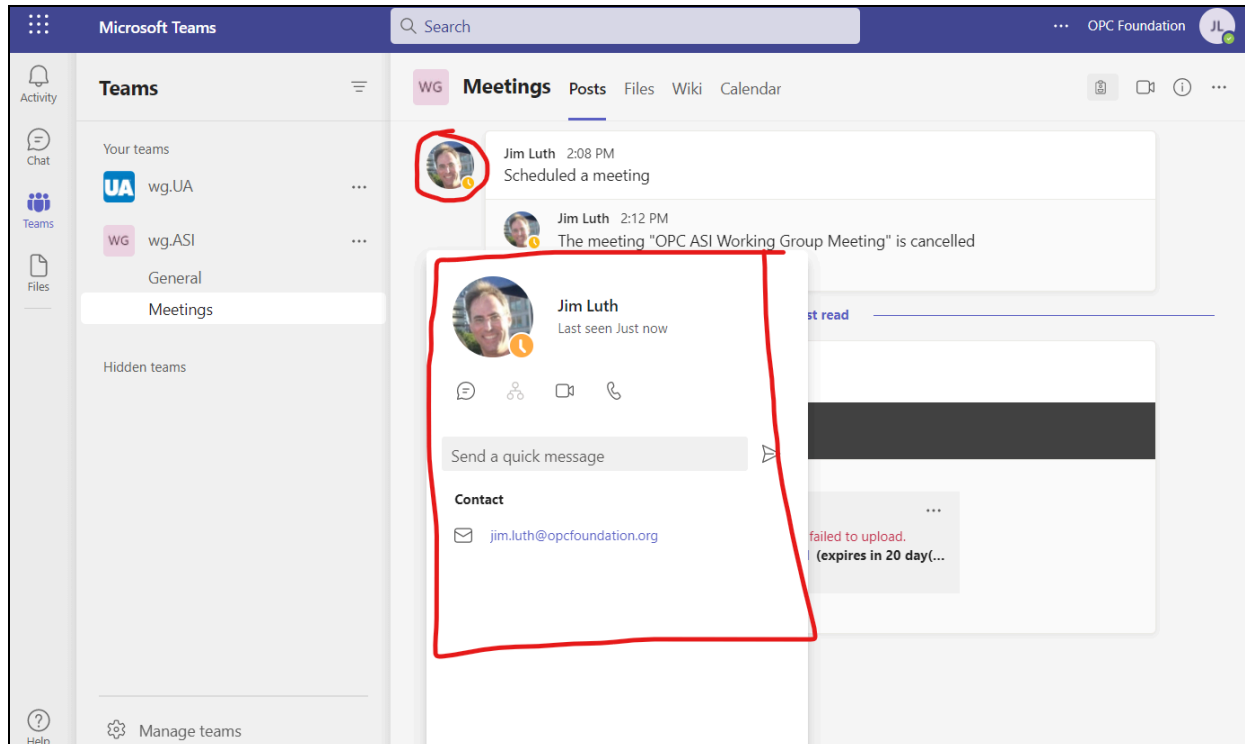
Then click the people icon in the “Chair” row:



The Working Group Chair will be identified. In some Working Groups there may be more than one Chair (e.g. co-chairs). Other Tags may identify others with special roles like sub-group chairs or editors.

## One-to-One communication

If you hover your mouse over any members circle (in the Members list or anywhere else they appear) a contact window will pop up with multiple options for one-to-one communication (chat, email, voice call, video call):

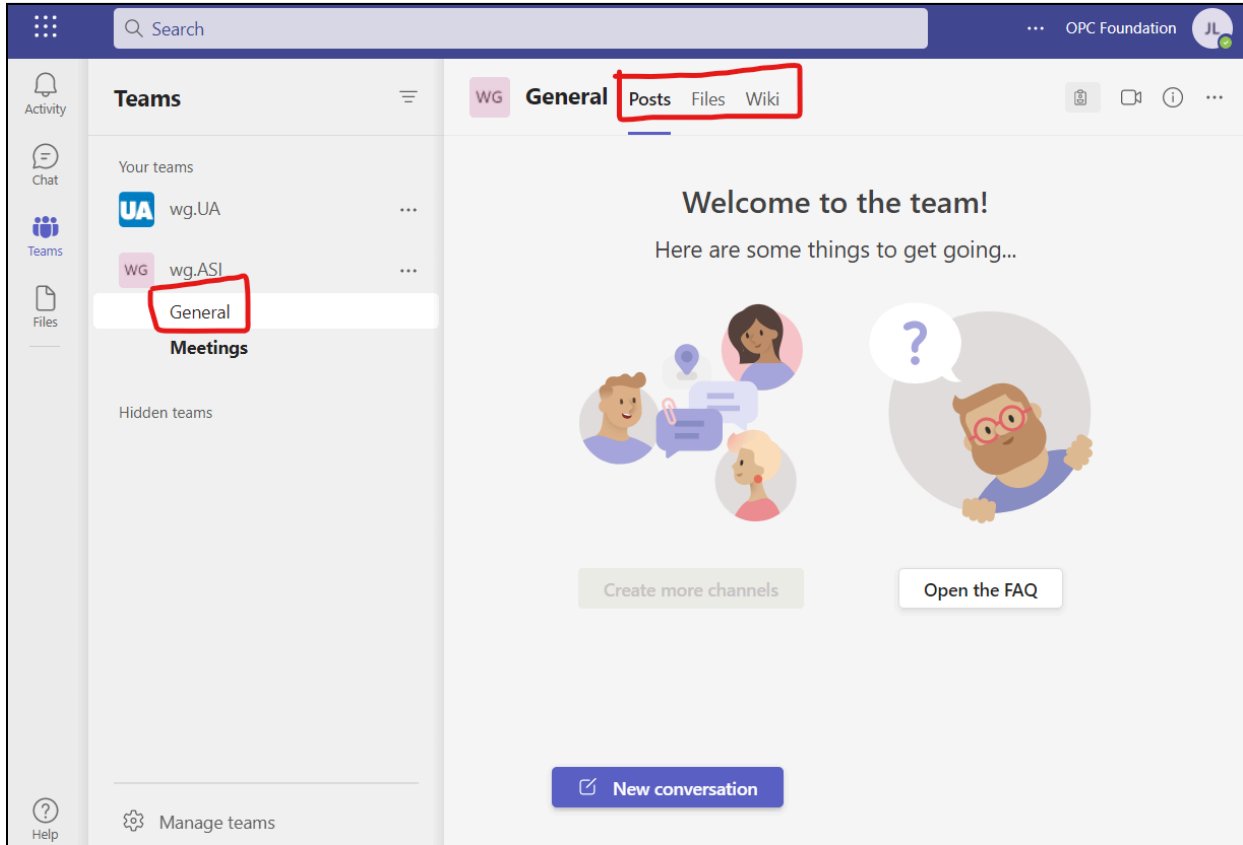


## Teams Channels

The content for a Team is subdivided into Channels. All Teams have a Channel named "General" to be used whenever a more appropriate specialized Channel does not exist. Some Working Groups will divide their work across multiple subgroups which appear as Teams Channels. If no subgroups exist, all information related to Teams meetings can be found in the "Meetings" Channel .

### General Channel

The General channel is pre-created with three tabs:



## Posts

Contains threaded conversations among the members. This is the main way you will communicate with members of the Team. You can start “New conversations” and reply to existing conversations.

**Note:** Always start a new conversation unless your message directly pertains to an existing conversation!

**Note:** Always “mention” the channel or the entire Team in your posts and replies to ensure that all of your teammates are properly notified of your message. To mention the channel type @channel. To mention the entire Team type @team and then pick the Team or Channel from the suggested list.

**Note:** “Search” can be useful to find conversations of interest.

## Shared

The Shared tab in General will contain Working Group documents like draft specifications and other documents that are not directly related to a specific meeting. (Meeting documents will be in the Meetings channel.)

## Wiki

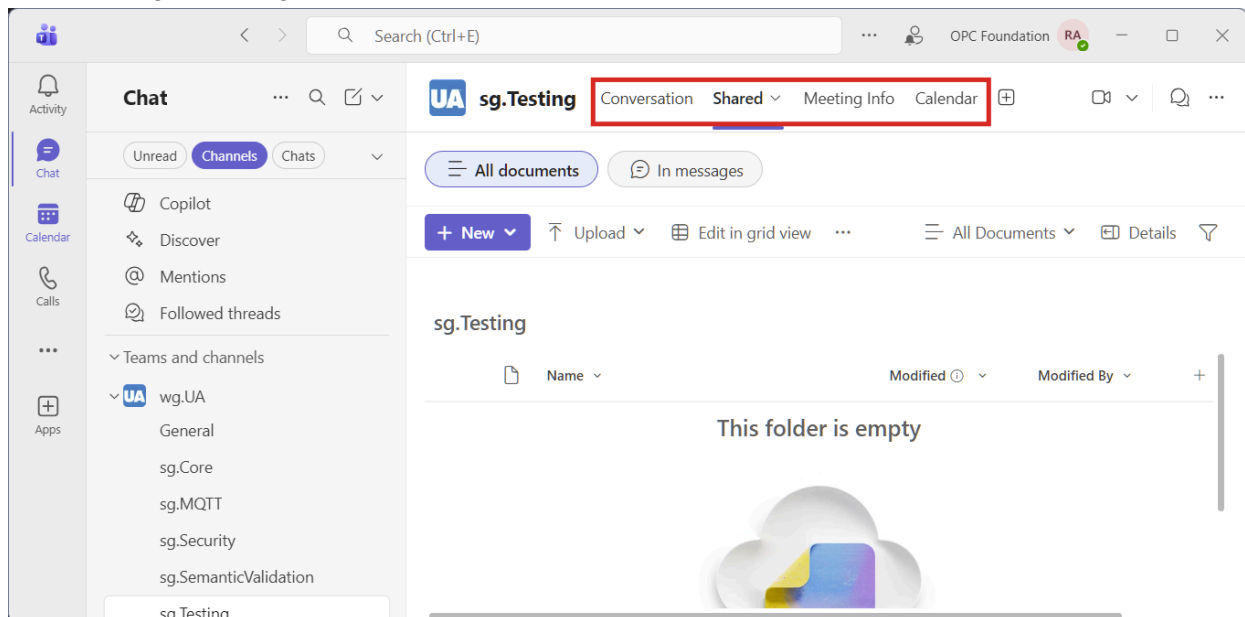
The wiki tab contains information important to the Team that has longevity and may not be noticed in a message in Posts. All members can edit and contribute to the wiki.

## Tasks

The Tasks tab allows the assignment of Tasks to Team members. This can be used for working groups to track work items outside of the standard OPC Mantis bug tracking tool for released specifications.

## Meetings or Subgroup Channel

The Meetings or Subgroup Channel is pre-created with four tabs:



## Conversation or Posts

Contains threaded conversation related to working group meetings. You will find posts here that indicate when a meeting starts, any chat messages sent during the meeting and a temporary download link for meeting recordings.

You should also create posts here that are directly related to meetings. For example working group editor may post the following the New conversation:

“I have posted a new Draft of Part 9 for review. Please add any comments directly to the posted doc. We will review all comments in the regular meeting on January 9.”

## Shared

The Shared tab in the Meetings channel contains the files and folders related to working group meetings. The files and folders are organized by year with sub-folders for each meeting. These meeting folders contain agendas, meeting minutes and other other documents discussed or viewed in the meeting.

## Meeting Info

The information needed to join the Working Group meeting. Note that all meetings for a working group or subgroup use the same Teams meeting information.

## Calendar

The Calendar tab contains a web page with the working group calendar:

## Core Subgroup — Meeting Calendar

Times shown in America/Vancouver

< >
today
March 2026
Month Week List

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 OPC UA Sen	3 OPC UA Wo	4	5 OPC UA Loc	6	7
8	9	10 OPC UA Wo	11 UA Security	12	13	14
15	16 OPC UA Sen	17 OPC UA Wo	18 UA Security	19	20	21
22	23	24	25	26	27	28
OPC UA Face-To-Face Meeting						
	OPC UA Sen		UA Security			
29	30	31 OPC UA Wo	1 UA Security	2 OPC UA Loc	3	4

All meetings scheduled for the working group (and all sub-groups) will appear in the calendar. The calendar is presented in your local time zone with the detected zone shown at the top.

**Note:** Meeting invites are sent to Team or Subgroup mailing lists and will keep your calendar up to date. If you need to get past meeting invites, the Calendar icon (📅) shown in the self-service portal allows you to request that a .ics file with active meetings for the working group or subgroup be emailed to you.

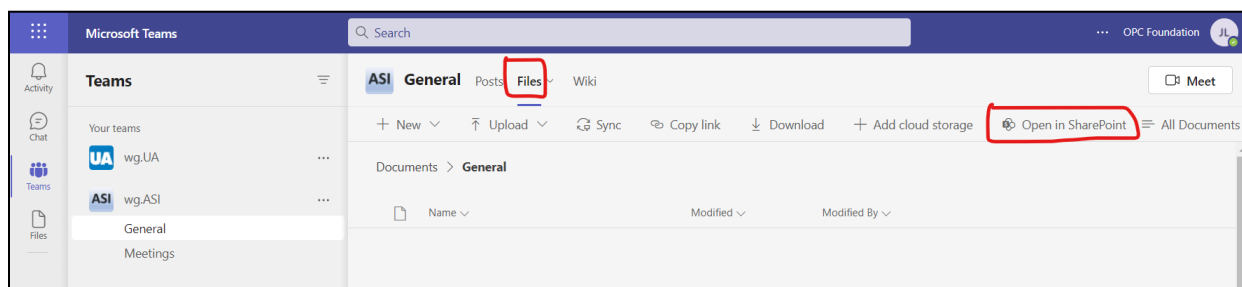
# Meeting invitations

If your Team has no sub-groups, then the working group Chair will use the Team email address to send meeting invites to all members of the Team. You should automatically receive meeting invites via email simply by being a member of the Team.

If your Team has sub-groups, then meeting invites are not sent to the Team email address. **You will not be automatically subscribed to receive invites via email.** If you wish to receive invites to your personal calendar, you must check the subgroup in the self-service portal described above.

# File operations

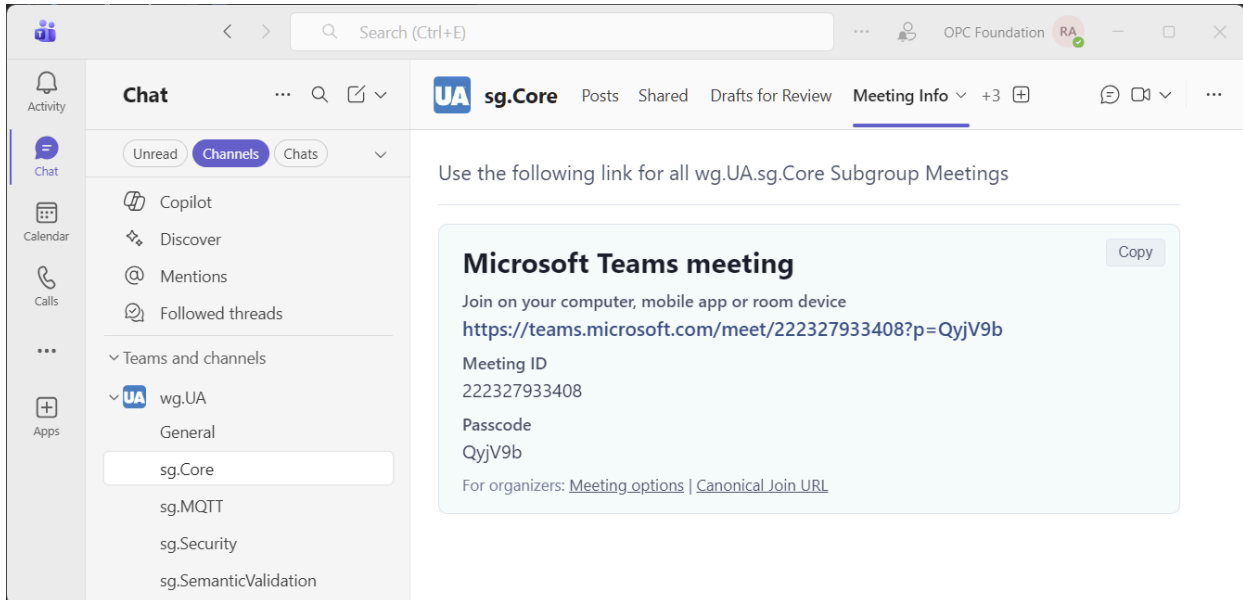
The Shared tabs in Teams are just a simplified view of a Document Library in SharePoint. You can navigate to the underlying SharePoint from Teams by clicking “Open in SharePoint” from the Shared tab:



Team members can add and edit documents and folders but are **not allowed to delete, rename or move** them. Chairs and owners have permissions to delete, rename and move, so members should contact a chair or owner with requests to perform these operations. If a chair does not have the necessary rights they should contact an owner.

# Attending Meetings

The same meeting link is used for all main working group meetings no matter what day and time they occur. **All Meetings are automatically recorded** (per OPC Foundation policy). The link to join the meeting can be found in the Meetings or Subgroup Channel ‘Meeting Info’ Tab:

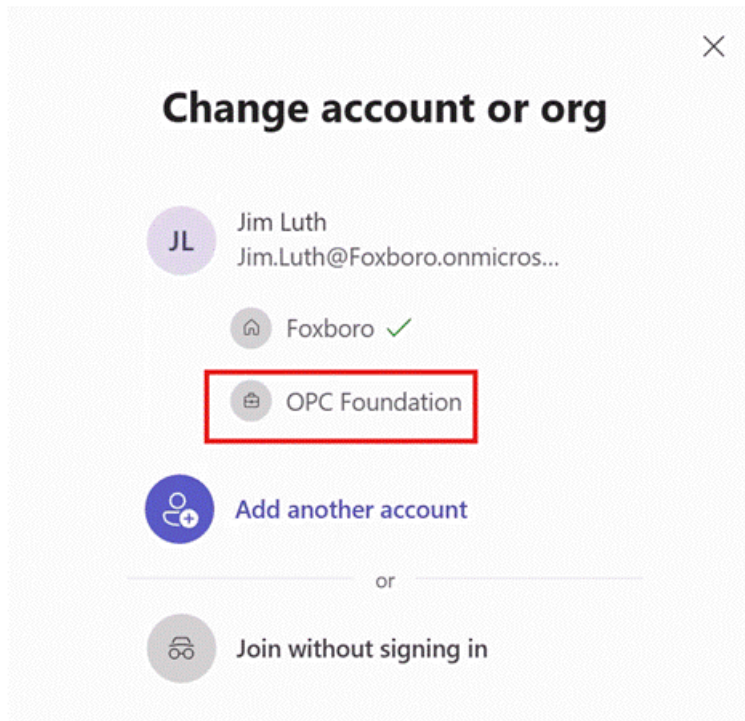
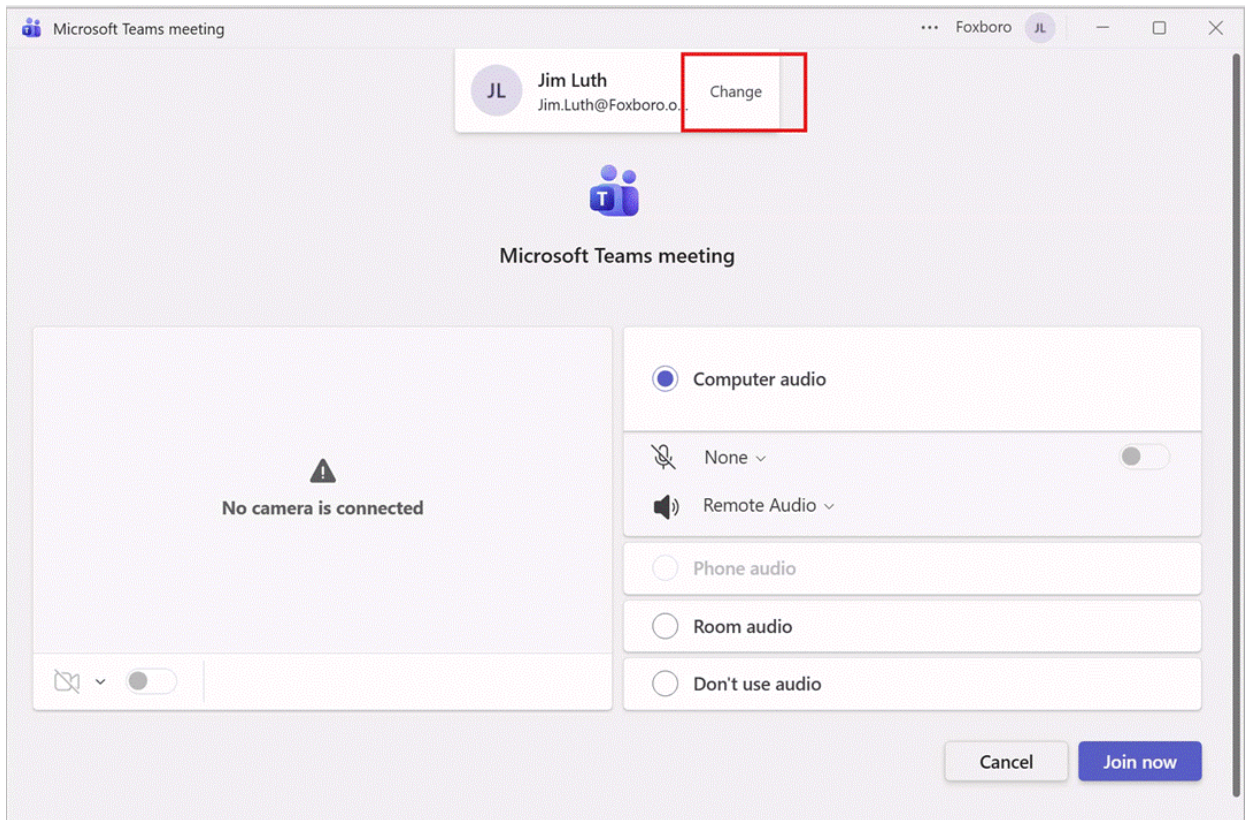


When you join a meeting, it is important to enter the meeting in the context of the OPC Foundation Organization rather than your company's organization. How you switch organizations is different if you join the meeting with the Teams app versus the web browser.

**Note:** If join without switching Organizations some meeting features will not be available to you and you will wait in the lobby until someone adds you.

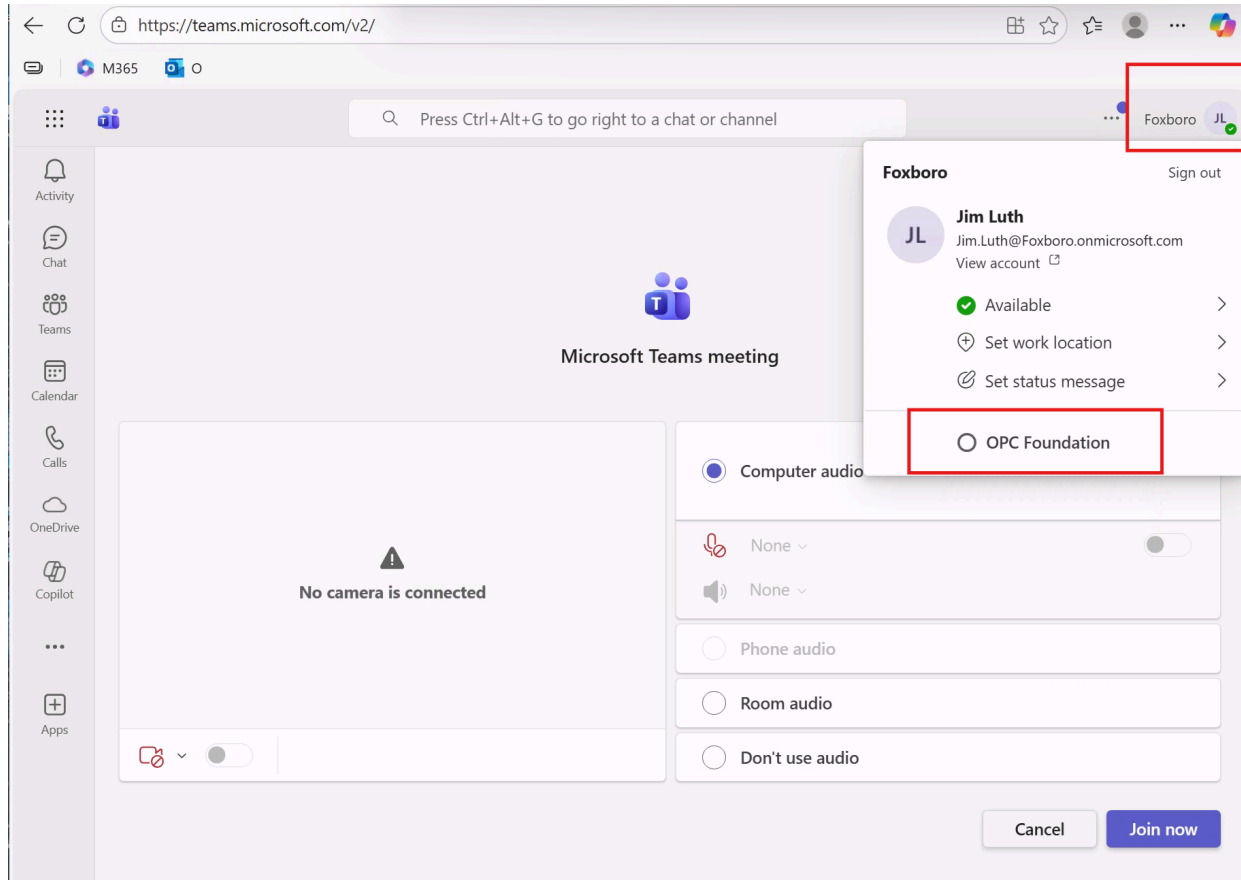
## Joining a meeting from the Teams App

Click "Change" in the entry screen and then choose "OPC Foundation":



## Joining a meeting from the Web Browser

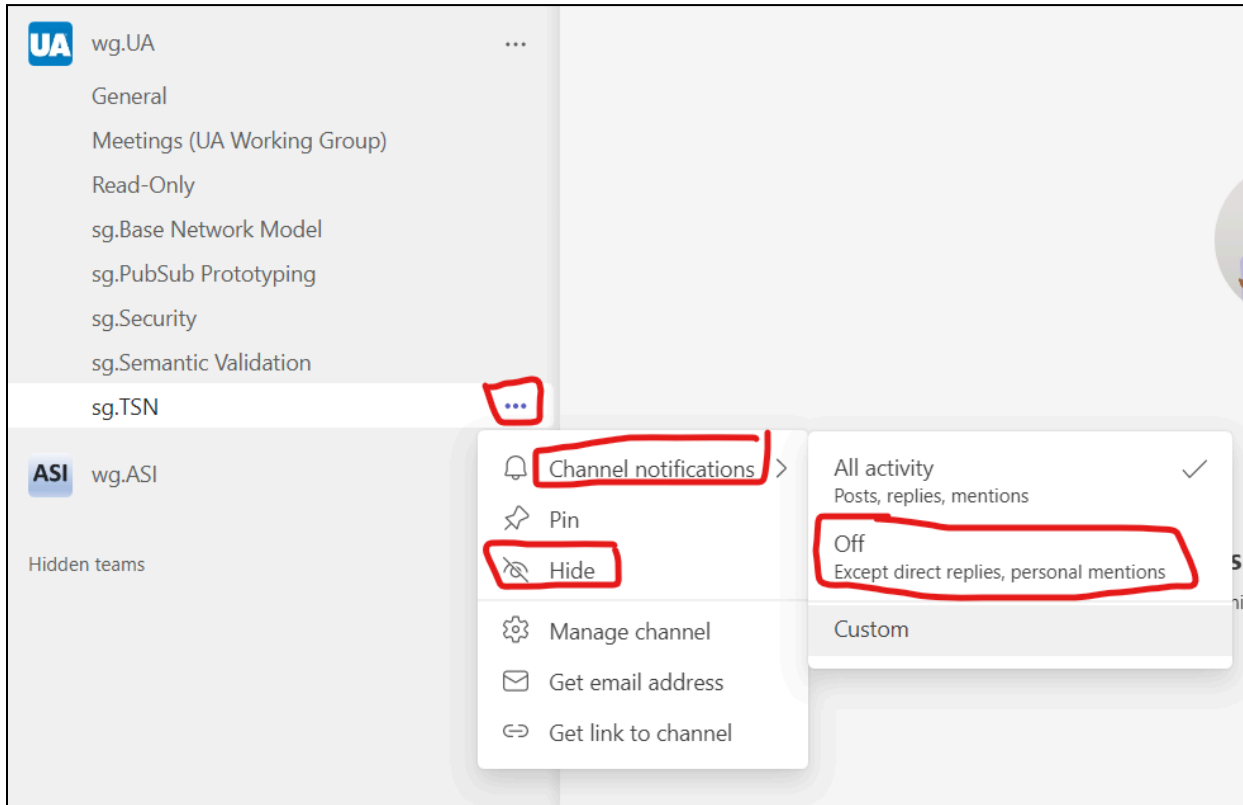
Click the circle with your initials or picture in the upper right and switch to the “OPC Foundation”:



**Note:** Always be sure to promptly leave the meeting when the chair declares the meeting over since the recording will not be saved until the last participant exits the meeting.

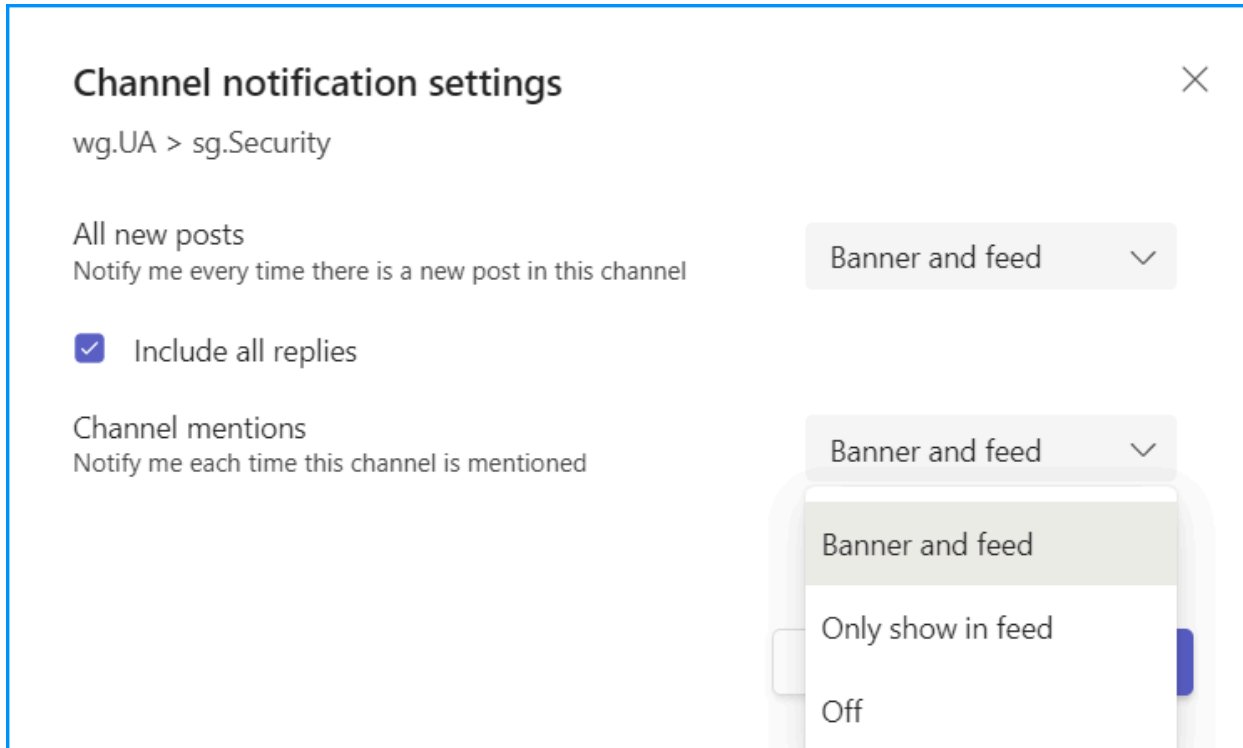
## Channel Notifications and Hiding Channels

If a Team you belong to has Channels that you are not interested in (e.g. for sub-groups that you do not wish to participate in), You can turn off Channel notifications and optionally hide the Channel by clicking the 3-dots next to the channel and making the following menu choices:

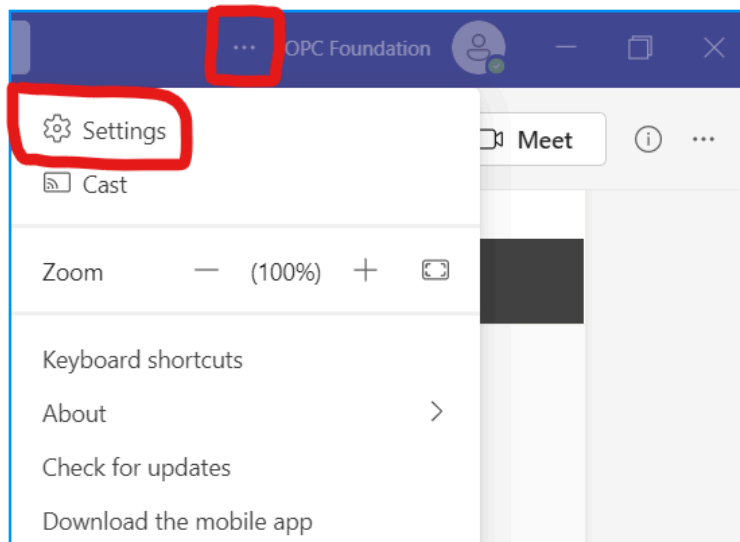


**Note:** Hiding and turning off notifications are separate choices so selecting one will not affect the other.

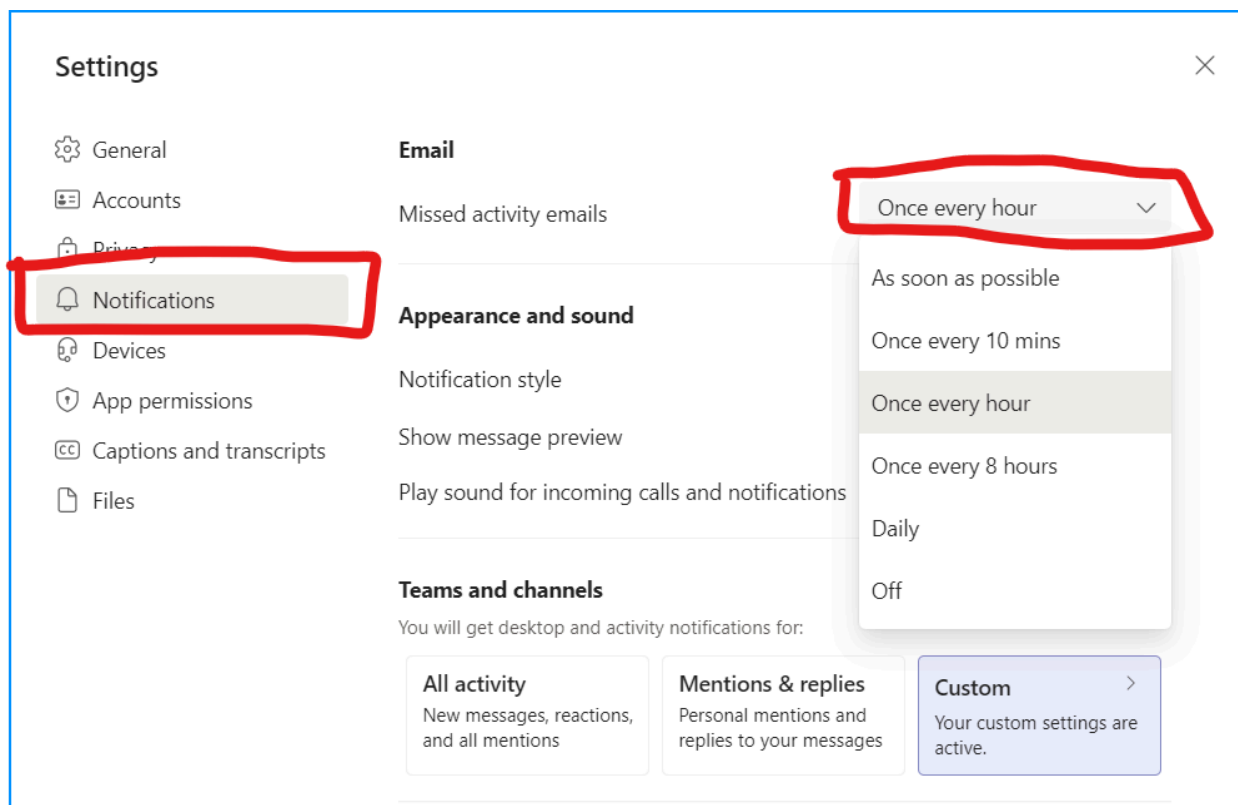
Choosing “Custom” in the menu above allows finer grained notification selections:



If you ignore new activity notifications in Teams, after a period of time, Teams will send you an email to let you know “Your teammates are trying to reach you in Microsoft Teams”. You can control how long Teams will wait before sending the missed activity email (the default is every hour). Click the three dots next to “OPC Foundation” in the top right corner, then choose “Settings”:



Choose “Notifications” and then the drop-down arrow next to “Missed activity emails” and choose your desired email frequency:



## Leaving the Working Group

Members may leave the working group via the self-service portal. Note that using Teams features to leave a Team will leave you subscribed to mailing lists. Using the self-service portal will completely remove your account from the system.

**Note:** If you leave the team, the only way to rejoin is to repeat the steps in [Joining the Working Group](#)