

# OPC Connectors

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## OPC DA Real-time values

This connector is used to get real time data from any available OPC server either on the local machine or across the network.

This connector can be used if the OPC server to connect does not have a specific connector available for it.

### Prerequisites

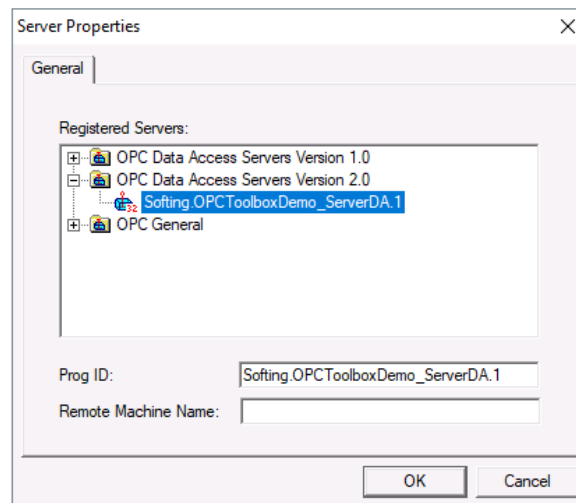
#### Verify Communication

Communication between the OPC server and an OPC client must be verified. Some OPC Server vendors like Kepware and Rockwell Automation provide OPC clients with their servers. These clients can be used to validate.

If an OPC client is not provided with the server, **XLReporter** provides an independent OPC client to verify connectivity and data retrieval from any OPC DA server. This client is found on **XLReporter's** product CD under **Tools, OPC, OPC\_DA**. It can also be downloaded from [www.SyTech.com](http://www.SyTech.com).

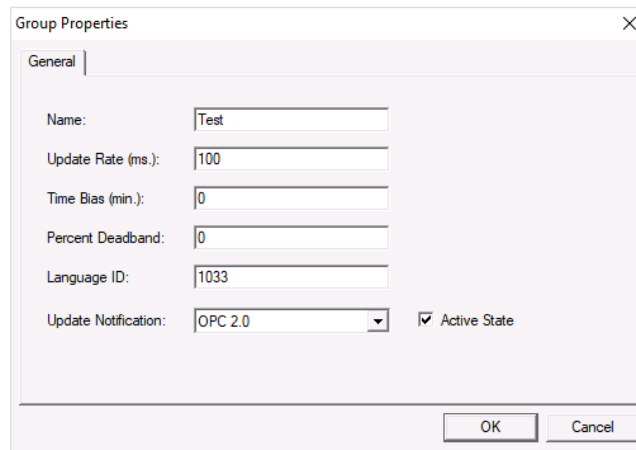
To run, double-click **SampleClientDA.exe**.

To connect to an OPC server, select **Edit, New Server Connection** to open the **Server Properties** window.



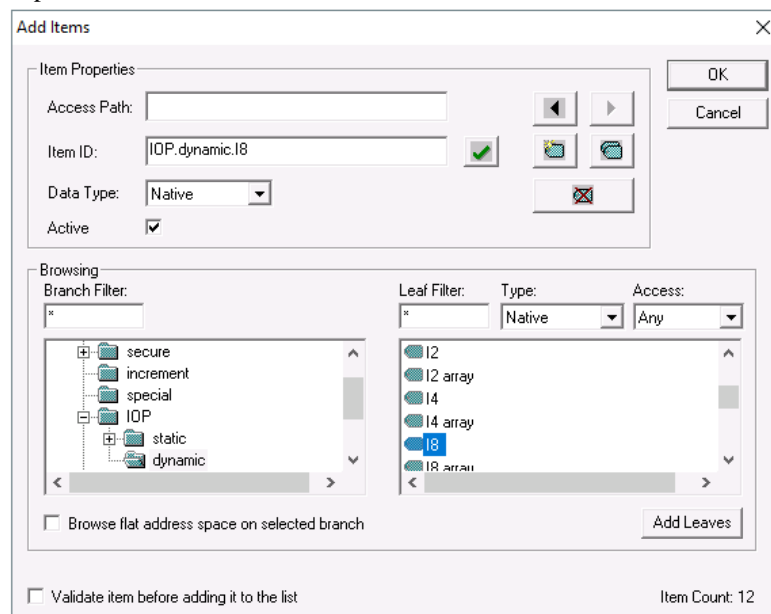
Expand the **OPC Data Access Servers Version 2.0**, select your OPC DA server and click **OK**.

From the **Edit** menu select **New Group**.

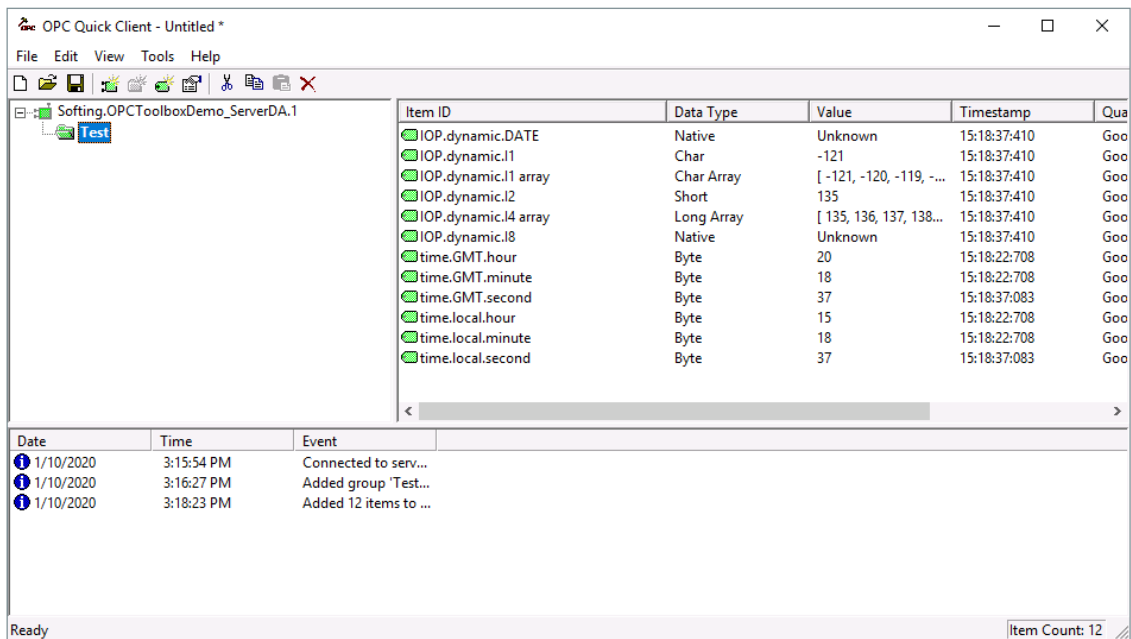


Specify **Name** and click **OK**.

Click on the group name created, and select **Edit, New Item**.



This opens the **Add Items** window. In the browsing section drill into the tree and select Leaf items on the right. For each leaf you want to view data for, click the Add Leaves button. Click **OK** when you have selected the tags to read.



All of the selected tags appear along with their real time values, type, quality, and timestamp.

If the client does not respond as described contact the OPC DA Server vendor technical support to troubleshoot and correct these issues.

## Remote Communication

If **XLReporter** is not installed on the same machine as the OPC DA Server, the **XLReporter** machine must have the OPC Core Components installed.

To determine if the core components are installed verify the following file exists:

- C:\Windows\SysWow64\OPCEnum.exe (64-bit OS)
- C:\Windows\system32\OPCEnum.exe (32-bit OS)

If the components are not installed then they are provided in the XLReporter installation folder under *\_repairtools\OPC*. Alternatively, these can be downloaded from [www.opcfoundation.org](http://www.opcfoundation.org).

## Server Settings

In order to connect to an OPC DA server remotely both the machine where the server is running and the machine where the client is running must have matching Windows user accounts and the client must be logged in with a matching account.

In addition, on the machine with the OPC DA server, certain DCOM settings must be enabled. For details on what DCOM settings to enable, see [OPC and DCOM: 5 Things You Need to Know](#).

## Windows Firewall

If the Windows Firewall is enabled on the machine where the OPC DA server is running TCP Port 135 must be opened in order for remote clients to connect.

## Connector

To configure the connector to the OPC DA server, from the **Project Explorer** select **Data, Connectors**.

- Click Add
- Select **OPC, OPC DA Real-time values**
- Click **OK**

### Primary Server

These settings define the **Name** and **Node** of the OPC DA server. A browse button is provided to browse for any available OPC DA server on the local machine or across the network.

Use the **Test Connection** button to verify a connection to the server.

### Secondary Server

These settings define the (optional) secondary OPC DA to connect to if a connection to the **Primary Server** fails.

### Settings

The **Settings** button is used to update tuning parameters if there are issues retrieving data from this connector.

The **Initial Wait** setting is the amount of time (in milliseconds) the **Connector** waits after making a request and before retrieving data. This can be useful when communications do not respond immediately.

**Retry** determines how many attempts are made when bad values are returned. The default is 2 and it should typically not be changed. The **Retry Time** determines how the time in between retries.

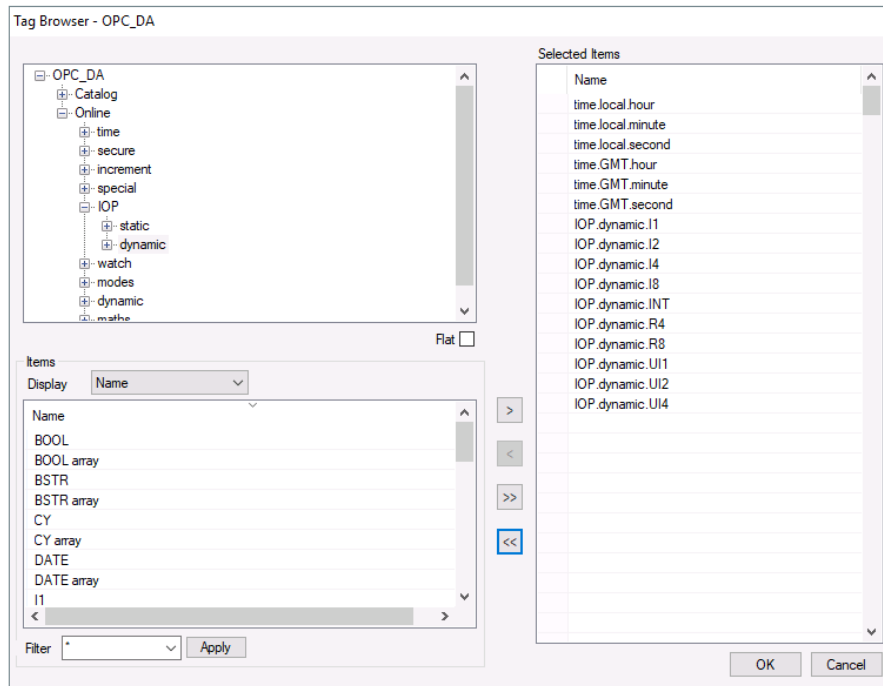
The **Read Method** setting determines how data is read from the server. By default, this is set to *device*. *Cache* is a faster way to read data but can cause bad quality data to be returned so only change this setting if good quality data is read.

If the **Use Pack Integrity Authentication Level** is checked, when a connection is made to a remote OPCDA server it uses the packet integrity authentication level. This must be set if the Microsoft DCOM hardening has been implemented on the system where the OPCDA server is installed.

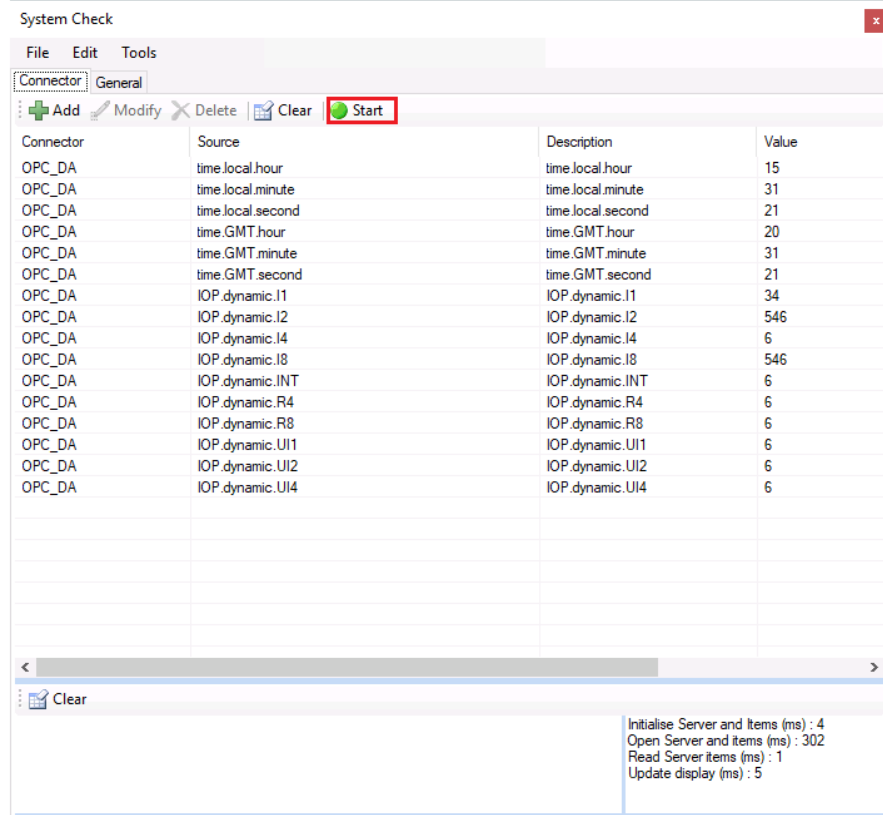
## Verify Data Communication

To verify communication to the OPC DA Server, open the **Project Explorer** and select the **Tools** tab. Launch the **System Check** application.

- Click **Add**
- Choose the OPC DA Server Connector from the dropdown list,
- Click the pushbutton ([...]) next to Items to open the Tag Browser window.
- Select one or more tags, click **OK**



- Click **Start** to verify the communication.



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## OPC UA Real-time values

This connector is used to get real time data from any available OPC UA server either on the local machine or across the network.

### Prerequisites

#### Verify Communication

Communication between the OPC server and an OPC client must be verified. Some OPC Server vendors provide OPC clients with their servers. These clients can be used to validate.

If an OPC client is not provided with the server, you can download the UAExpert OPC UA client from Unified Automation to verify connectivity and data retrieval from the OPC UA server.

### Remote Communication

If **XLReporter** is not installed on the same machine as the OPC UA Server, the **XLReporter** machine must have the OPC Core Components installed.

To determine if the core components are installed verify the following file exists:

- C:\Windows\SysWow64\OPCEnum.exe (64-bit OS)
- C:\Windows\system32\OPCEnum.exe (32-bit OS)

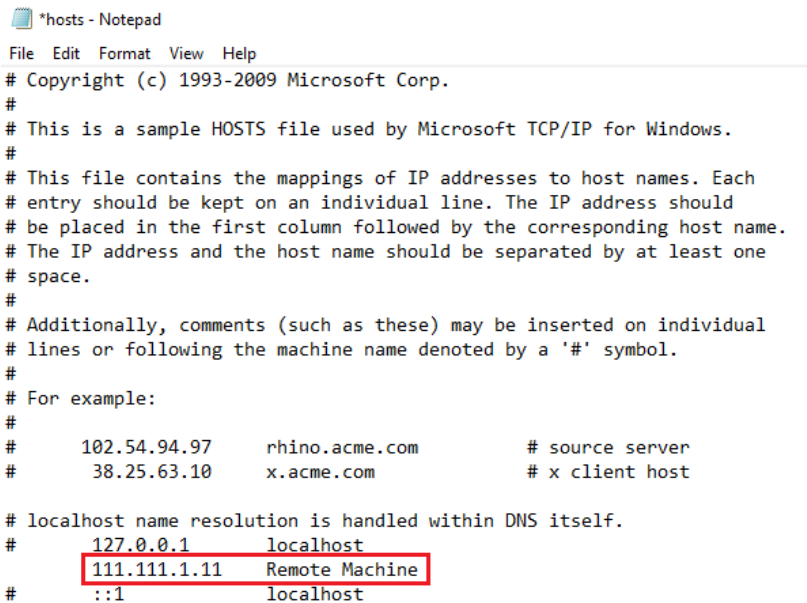
If the components are not installed then they are provided in the tools folder of the installation or from [www.opcfoundation.org](http://www.opcfoundation.org).

### OPC Server Certificate Constraints

If the OPC UA server does not contain or contains an incorrect or otherwise unusable IP address, the machine name can be used in its place when establishing the connections. However, if the machine name cannot be associated with a specific IP address, then administrator edits to the HOSTS file on the client machine may be necessary.

The HOSTS file can be found in C:\Windows\System32\drivers\etc. Right-click it and open it in Notepad.

Add an entry similar to the one in the red box below, where *111.111.1.11* is the IP address of the remote machine and Remote Machine is the name of that machine that appears in the OPC UA Server certificate.



```
*hosts - Notepad
File Edit Format View Help
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97     rhino.acme.com           # source server
#       38.25.63.10    x.acme.com               # x client host

# localhost name resolution is handled within DNS itself.
#       127.0.0.1      localhost
#       111.111.1.11  Remote Machine
#       ::1           localhost
```

If the file cannot be saved in this directory, save it to the Documents folder and then copy and overwrite the HOSTS file currently in this directory.

## Connector

To configure the connector to the OPC UA server, from the **Project Explorer** select **Data, Connectors**.

- Click **Add**
- Select **OPC, OPC UA Real-time values**
- Click **OK**

The screenshot shows the 'OPC UA\_1' connector configuration dialog box. The 'Server' tab is selected. The 'Endpoint Filter' is set to 'opc.tcp'. The 'Host Name' is 'localhost' and the 'Port' is '48030'. The 'Servers at Host' list is empty, with a 'Find...' button. The 'User Identity' is 'anonymous'. The 'Security Profile' is set to 'None'. A table with 'Description' and 'Value' columns is visible at the bottom. 'Apply' and 'Close' buttons are at the bottom right.

Under the **Server** tab, for **Host Name**, select or enter the name or IP address of the machine where the server is running. Enter the **Port** number as set up in the server.

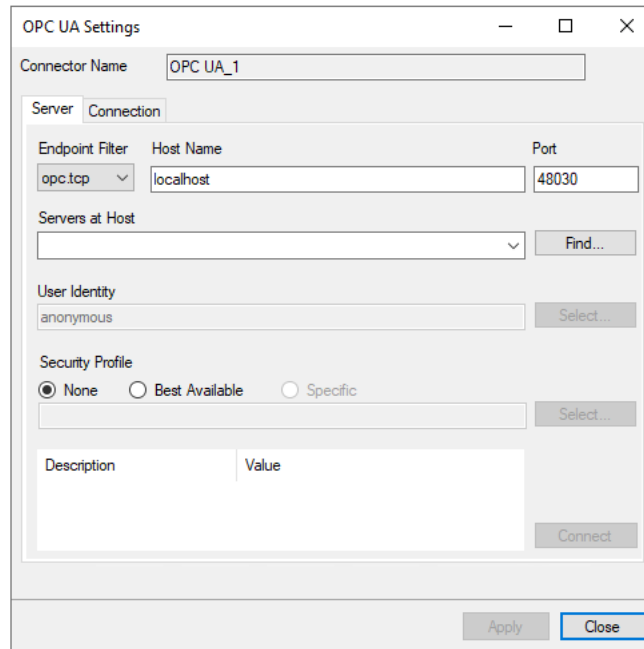
For **Servers at Host**, click **Find**. Select the one you wish to connect to.

For **User Identity**, click **Select** to specify.

Select the **Connection** tab at the top.

The screenshot shows the 'OPC UA Settings' dialog box with the 'Connection' tab selected. The 'Certificates' section has 'Create Client Certificate' and 'Trust Server Certificate' buttons. The 'Setting' section has four input fields: 'Request timeout (sec)' (20), 'Wait before request (sec)' (0), 'Request retries before fail' (2), and 'Request retry interval (msec)' (100). 'Apply' and 'Close' buttons are at the bottom right.

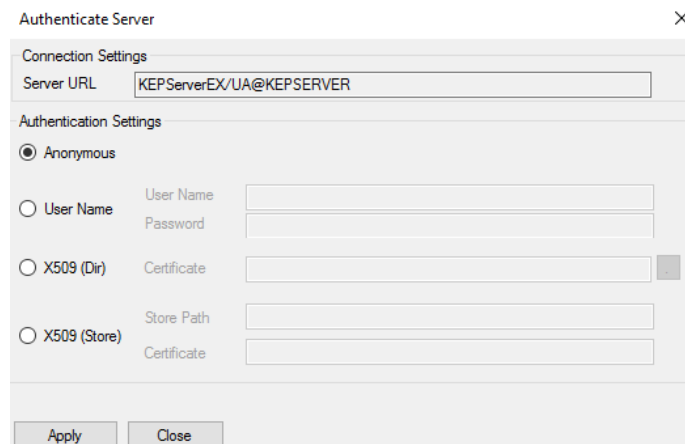
The Client Certificate is automatically created on installation. If required, to recreate the certificate select **Create Client Certificate**. For most OPC UA servers, the default settings will be sufficient, but if the server requires more advanced certificate settings you can specify them with the **Advanced** button. Click **Create** to creating the client certificate.



Navigate back to the **Server** tab of the connector. Set **Host Name** to the name or IP address of the server machine.

Typically information about the **Port** number to use can be found in the OPC UA server settings.

The **Servers at Host** dropdown displays all the available servers based on the **Host Name** and **Port**. Click the **Select** button next to the **User Identity** field.



Depending on the security settings over the **Server**, select an appropriate **User Identity** and click **Apply**.

Select an appropriate **Security Profile** radio button. If **Specific** is chosen, click **Select** on the right to select a specific profile to use.

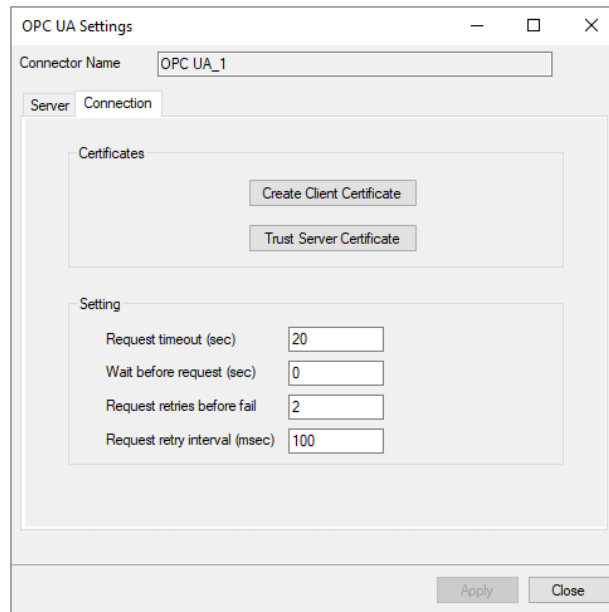
Click **Get Endpoints** to get the list of available endpoints, select the one that best fits the security settings configured for the server and click **OK**.

Click **Connect** to ensure connectivity. This may require an exchange of certificates between the client and the server. If prompted to exchange, click **Yes**. This action requires Windows administrator rights.

If the **Connect** fails, be sure that the client certificate is trusted by the server and then attempt to **Connect** again.

Under the **Connection** tab are **Certificates** options and general **Settings**.





The Client Certificate is automatically created on installation. If required, to recreate the certificate select **Create Client Certificate**. For most OPC UA servers, the default settings will be sufficient, but if the server requires more advanced certificate settings you can specify them with the **Advanced** button.

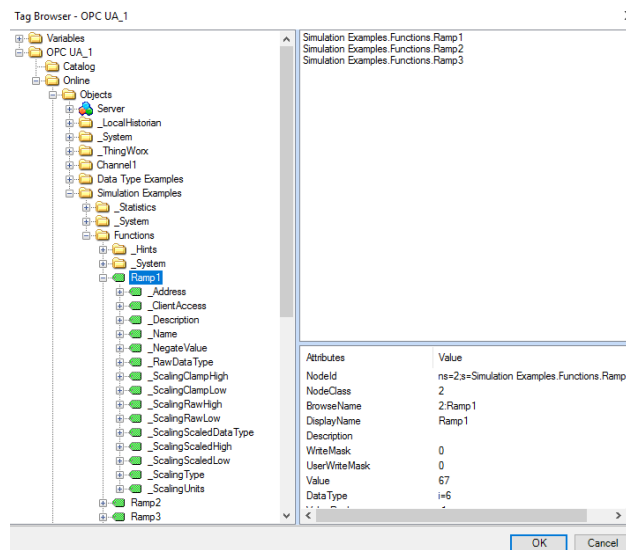
## Trusted Clients

In some cases the OPC UA server must be configured to trust the client certificate submitted in order to establish a connection. Refer to the documentation provided by the specific OPC UA Server for details.

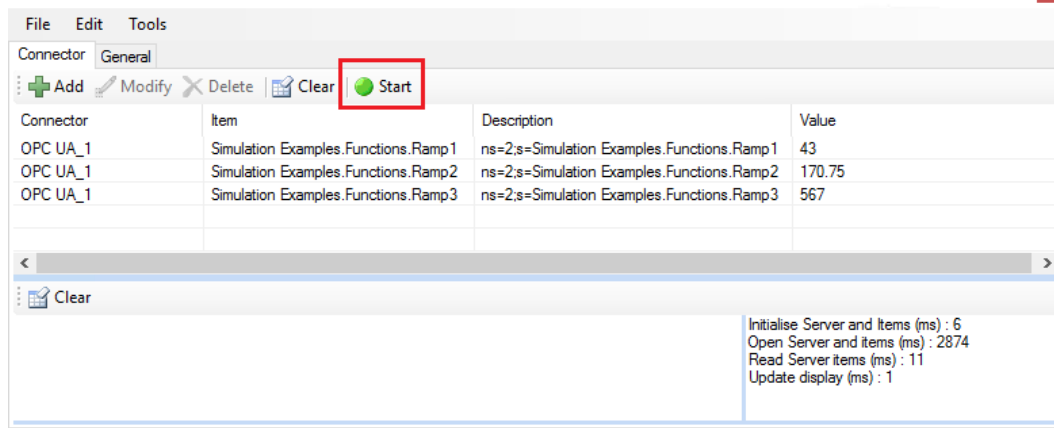
## Verify Data Communication

To verify communication to the OPC UA Server, open the **Project Explorer** and select the **Tools** tab. Launch the **System Check** application.

- Click **Add**
- Choose the OPC UA Server Connector from the dropdown list,
- Click the pushbutton ([...]) next to Items to open the Tag Browser window.
- Select one or more tags, click **OK**



- Click **Start** to verify the communication.



The screenshot shows a software window titled "System Check" with a menu bar (File, Edit, Tools) and a toolbar containing "Add", "Modify", "Delete", "Clear", and "Start" buttons. The "Start" button is highlighted with a red box. Below the toolbar is a table with the following data:

Connector	Item	Description	Value
OPC UA_1	Simulation Examples.Functions.Ramp1	ns=2;s=Simulation Examples.Functions.Ramp1	43
OPC UA_1	Simulation Examples.Functions.Ramp2	ns=2;s=Simulation Examples.Functions.Ramp2	170.75
OPC UA_1	Simulation Examples.Functions.Ramp3	ns=2;s=Simulation Examples.Functions.Ramp3	567

Below the table is a "Clear" button and a performance log:

```
Initialise Server and Items (ms) : 6  
Open Server and items (ms) : 2874  
Read Server items (ms) : 11  
Update display (ms) : 1
```

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## OPC HDA Historical values

This connector is used to get historical data from any available OPC HDA server either on the local machine or across the network.

This connector can be used if the OPC HDA server to connect does not have a specific connector available for it.

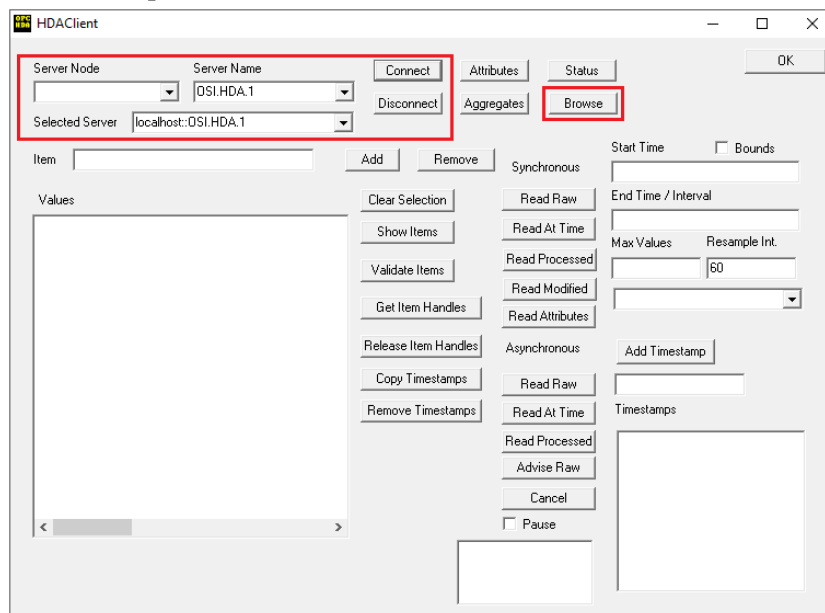
### Prerequisites

#### Verify Communication

Communication between the OPC server and an OPC client must be verified. Some OPC Server vendors provide OPC HDA clients with their servers. These clients can be used to validate.

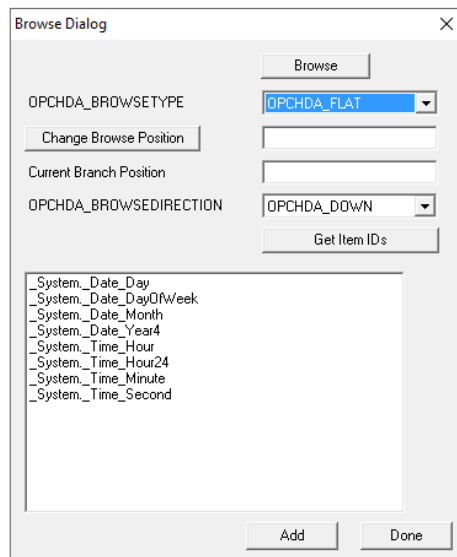
If an OPC HDA client is not provided with the server, **XLReporter** provides an independent OPC HDA client to verify connectivity and data retrieval from any OPC HDA server. This client is found on **XLReporter's** product CD under **Tools, OPC, OPC\_HDA**. It can also be downloaded from [www.SyTech.com](http://www.SyTech.com).

To run, double-click **SampleClientHDA.exe**.



To connect to an OPC HDA server select the **Server Name** from the dropdown list and click **Connect**.

Click **Browse** to open the **Browse Dialog** window.



The easiest way to get a list of tags is to set **OPCHDA\_BROWSETYPE** to *OPCHDA\_FLAT*. Choose each tag to test by selecting it and clicking **Add**. When complete, click **Done** to return to the **HDA Client** window.

Click **Show Items** to display the selected tags in the left pane window. Click **Validate Items** then **Get Item Handles** to register these tags with the server.

Enter the **Start Time** and **End Time** . Note this is in UTC(Universal Time Clock) and click **Read Raw**. The raw values for each selected tag will appear on the left along with a timestamp and quality.

To read processed data, click **Aggregates**, select the appropriate aggregate (e.g., maximum, minimum, etc.) and click **Read Processed**. One minute calculations between the start and end time should appear for each selected tag.

If the client does not respond as described contact the OPC HDA Server vendor technical support to troubleshoot and correct these issues.

## Remote Communication

If **XLReporter** is not installed on the same machine as the OPC UA Server, the **XLReporter** machine must have the OPC Core Components installed.

To determine if the core components are installed verify the following file exists:

- C:\Windows\SysWow64\OPCEnum.exe (64-bit OS)
- C:\Windows\system32\OPCEnum.exe (32-bit OS)

If the components are not installed then they are provided in the tools folder of the installation or from [www.opcfoundation.org](http://www.opcfoundation.org).

## Server Settings

In order to connect to an OPC HDA server remotely both the machine where the server is running and the machine where the client is running must have matching Windows user accounts and the client must be logged in with a matching account.

In addition, on the machine with the OPC HDA server, certain DCOM settings must be enabled. For details on what DCOM settings to enable, see [OPC and DCOM 5 things you need to know](#).

## Windows Firewall

If the Windows Firewall is enabled on the machine where the OPC HDA server is running TCP Port 135 must be opened in order for remote clients to connect.

## Connector

To configure the connector to the OPC HDA server, from the **Project Explorer** select **Data, Connectors**.

- Click **Add**
- Select **OPC, OPC HAD Historical values**
- Click **OK**

OPC HDA Historical values

Connector Name: OPC\_History\_1

Description:

Primary Server

Server Name: OSI.HDA.1

Node:  local

Test Connection

Secondary Server

Server Name: OSI.HDA.1

Node:  local

Test Connection

OK Cancel

### Primary Server

These settings define the **Name** and **Node** of the OPC HDA server. Use the browse button to browse the local or remote machine to select the OPC HDA server.

Use the **Test Connection** button to verify a connection to the server.

### Secondary Server

These settings define the (optional) secondary historian to connect to if a connection to the **Primary Server** fails.

### Settings

Setting

Use Packet Integrity Authentication Level

OK Cancel

If the **Use Pack Integrity Authentication Level** is checked, when a connection is made to a remote OPCHDA server it uses the packet integrity authentication level. This must be set if the Microsoft DCOM hardening has been implemented on the system where the OPCHDA server is installed.

## Data Group

The following describes the historical data group settings specific to the **OPC HDA Historical Values** connector.

### Group Types

The following group types are available:

#### Summary Values from Server

This group type retrieves summary calculations directly from the historian. Consult the historian documentation from the OPC HDA server vendor to see what calculations are supported.

#### Summary Values from XLReporter

This group type retrieves sampled values from the historian and performs calculations on those samples for reporting.

By default, summary values are calculated time weighted and values are propagated based on the last known value. However, to change this so that summary values are calculated strictly on the data returned check **use raw values**.

#### Raw Values

This group retrieves values logged to the historian between the start and end time specified.

### Group Settings

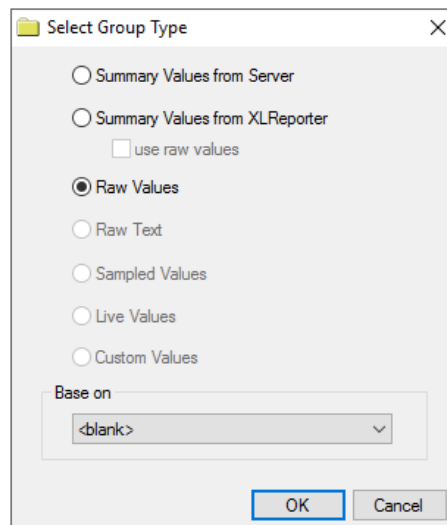
#### Setup Tab (Summary Values for XLReporter)

The **Retrieval** settings define how data is retrieved for the calculations selected for the group. The following settings are available:

- **Retrieval Mode**  
This setting defines how data is retrieved from the historian. Both *Sampled Values* and *Raw Values* are available where *Sampled Values* uses the *Interpolated* calculation. Note, if the OPC HDA server does not support the *Interpolated* calculation, do not use *Sampled Values*.
- **Rate**  
The interval (in seconds) that sampled values are retrieved from the historian.
- **Lead Time**  
The amount of time (in seconds) to retrieve data before the start time.

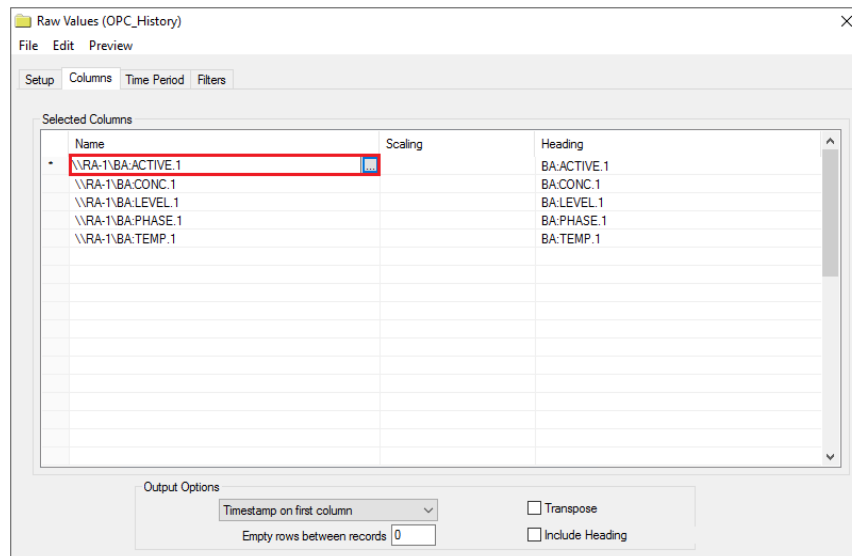
## Verify Data Communication

To verify communication with the OPC HDA Server, open the **Project Explorer** and select the **Tools** tab. Open **Connector Groups**. Select your OPC HDA Server connector and then select Add.



Set the Group Type to **Raw Values** and click **OK**.

On the **Columns** tab:



- Select the first row under the **Name** column
- Click the browse pushbutton (...)
- In the Tag Browser expand **Online** and add **Items** from the lower left.
- Click **OK** to add these to the group.

To retrieve data, select **Preview**. In the **Preview** window, use the data picker to select a date and time with for which data has been logged. Click **Refresh** to view data. The first 60 records starting at the date and time specified should be displayed.

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