



# OT Connect



# Contents

<b>Chapter 1: Overview</b>	<b>1</b>
About OT Connect	2
OT Connect System Requirements	2
<b>Chapter 2: Workflow</b>	<b>4</b>
OT Connect Workflow	5
A1 - Define connection to OT Source	5
A2 - Define Data Acquisition Parameters of OT Source	5
A3 - Test connection to OT Source	5
A4 - Synchronize Source Tag Metadata from OT Source	5
A5 - Preview Source Tag Data	6
A6 - Link Source Tag to GE Digital APM Content	6
<b>Chapter 3: OT Connect User Interface Pages</b>	<b>7</b>
Connections	8
OT Connect Tag Browser	13
<b>Chapter 4: Deployment</b>	<b>17</b>
Upgrade from PDI to OT Connect	18
Deploy OT Connect for the First Time	20
<b>Chapter 5: Install and Configure OT Connect Services</b>	<b>22</b>
Install OT Connect Adapter Service	23
Configure OT Connect Adapter Service	24
Install OT Connect Conductor Service	25
<b>Chapter 6: References</b>	<b>26</b>
OT Connect System Architecture	27
Data Model	28

Security Groups and Roles	31
Site Filtering	31
Working with Connection Status	32
About Importing and Synchronizing Tags	33
Working with Configuration Files	34
Working with Logging	36
Working with the OT Source Capability Utility	37
Working with Protocol Adapters	38
<b>Chapter 7: Glossary</b>	<b>40</b>
Glossary	41

# Copyright GE Digital

© 2020 General Electric Company.

GE, the GE Monogram, and Predix are either registered trademarks or trademarks of All other trademarks are the property of their respective owners.

This document may contain Confidential/Proprietary information of and/or its suppliers or vendors. Distribution or reproduction is prohibited without permission.

THIS DOCUMENT AND ITS CONTENTS ARE PROVIDED "AS IS," WITH NO REPRESENTATION OR WARRANTIES OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO WARRANTIES OF DESIGN, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE. ALL OTHER LIABILITY ARISING FROM RELIANCE UPON ANY INFORMATION CONTAINED HEREIN IS EXPRESSLY DISCLAIMED.

Access to and use of the software described in this document is conditioned on acceptance of the End User License Agreement and compliance with its terms.

# Chapter 1

---

## Overview

### Topics:

- [About OT Connect](#)
- [OT Connect System Requirements](#)

## About OT Connect

OT Connect allows you to connect to and synchronize Tag metadata from an OPC-compliant historian. This also allows you to enable Tag subscriptions to view, analyze, and act on real time process data, such as temperature or pressure.

With OT Connect services, you can do the following:

- Set up a connection to a process historian to ingest Tag data, Tag Hierarchy, and query for Readings in the historian.
- Define scheduling to ingest and synchronize Tag metadata.
- Query historical Readings for Health Trends and Policy nodes.
- Enable tag subscriptions which trigger Health Indicators and Policy workflows.

## OT Connect System Requirements

### License Requirements

The APM OT Connect license is required to take full advantage of the OT Connect functionality.

**Note:** If you are upgrading from a 4.x version which is running PDI to use OT Connect, you must also activate the OPC Interfaces licenses.

### Additional Components Required

In addition to the basic GE Digital APM system architecture, your system must also contain the following components:

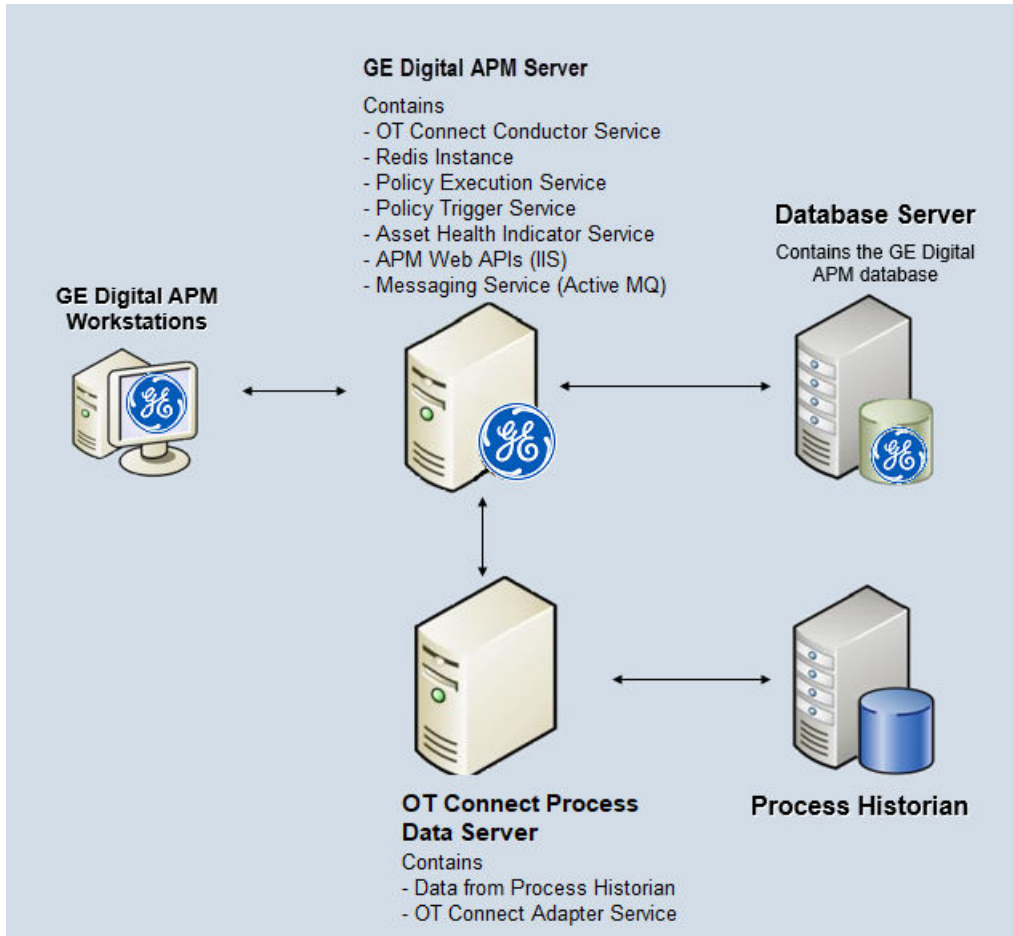
- OT Connect Conductor service must be installed on the GE Digital APM Server.
- OT Connect Process Data Server: A machine on which the OPC compliant software is installed. The software requirements of this server are determined by the third-party distributor of the software. OT Connect Adapter must be installed on the OT Connect Process Data Server.
- Process Historian: A machine on which the process historian software is installed. The software requirements of this machine are determined by the third-party distributor of the software.

**Important:** OT Connect supports the OPC Foundation Historical Data Access (OPC-HDA) specification version 1.20. To support direct consumption of readings by Asset Health indicators and triggered policies, the server must implement the End aggregate.

Refer to the supported software and devices documentation for information about OT Connect Process Data Servers and Process Historians that are tested for the OT Connect feature. The OT Connect Adapter can be installed and run on the OT Connect Process Data Server in OT Source Capability Utility mode to validate the capabilities of specific OT Connect Process Data Servers and process historians on a case-by-case basis. Refer to the deployment section for more information on the OT Connect Adapter.

### System Architecture

The following image shows the basic system architecture for deploying OT Connect with one GE Digital APM Server.



### Deploying OT Connect

After you have installed and configured the basic GE Digital APM system architecture, you must perform some [configuration steps specifically for OT Connect](#).

If you want to use OT Connect with Asset Health Manager and Policy Designer, you must also configure the services associated with these modules.

### Supported Features in APM Now

This module is not available in the APM Now environment.

# Chapter 2

---

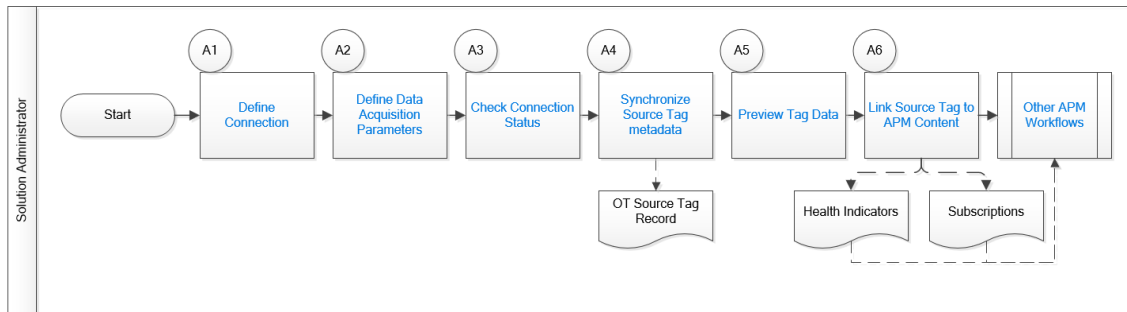
## Workflow

### Topics:

- [OT Connect Workflow](#)
- [A1 - Define connection to OT Source](#)
- [A2 - Define Data Acquisition Parameters of OT Source](#)
- [A3 - Test connection to OT Source](#)
- [A4 - Synchronize Source Tag Metadata from OT Source](#)
- [A5 - Preview Source Tag Data](#)
- [A6 - Link Source Tag to GE Digital APM Content](#)



# OT Connect Workflow



## A1 - Define connection to OT Source

Persona: Solution Administrator

Define OT Source connection endpoint. Standard OT Source interfaces offer connection to field device systems, such as condition monitoring devices, instrumentation, process historians, and so on.

## A2 - Define Data Acquisition Parameters of OT Source

Persona: Solution Administrator

Define parameters for the acquisition of data from the OT Source in GE Digital APM. These parameters can include data polling frequency (that is, how often data will be acquired and aggregated for evaluation), filtering (for example, severity and type of data), and so on.

## A3 - Test connection to OT Source

Persona: Solution Administrator

After the data acquisition parameters are defined, test the connection to ensure that the OT Source is communicating with GE Digital APM.

## A4 - Synchronize Source Tag Metadata from OT Source

Persona: Solution Administrator

An initial data synchronization is conducted that creates records representing Tags in GE Digital APM. A Source Tag can represent a time series of data for a single monitored parameter, a summarized or calculated result, or a stream of events. Tags are kept in synchronization with changes in the field data systems. If a Tag used in GE Digital APM is removed from the source system, the deleted Tag will be flagged as deleted. The Tag will not display in the user interface, but will remain in the GE Digital APM database.

## **A5 - Preview Source Tag Data**

Persona: Solution Administrator

Interrogate synchronized Tags from GE Digital APM to confirm data delivery and coherence.

## **A6 - Link Source Tag to GE Digital APM Content**

Persona: Solution Administrator

Relate Tags to GE Digital APM content (Health Indicators, Policy Instances, and so on) and Assets (Equipment and Functional Locations) to provide the correct context for data analysis. This can establish a subscription to retrieve data automatically, if the content requires it and the OT Source supports subscriptions.

Monitored data is used in Asset Health Management, Policies, and Production Loss Accounting processes. For more information, refer to the relevant workflows.

# Chapter 3

---

## OT Connect User Interface Pages

### Topics:

- [Connections](#)
- [OT Connect Tag Browser](#)

# Connections

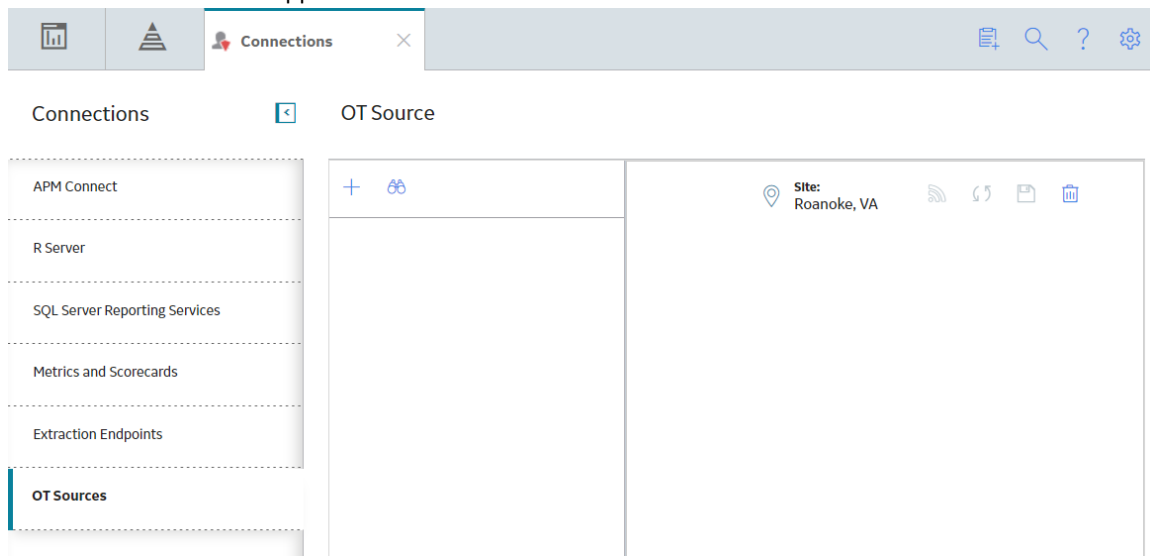
## Create OT Source

### Before You Begin

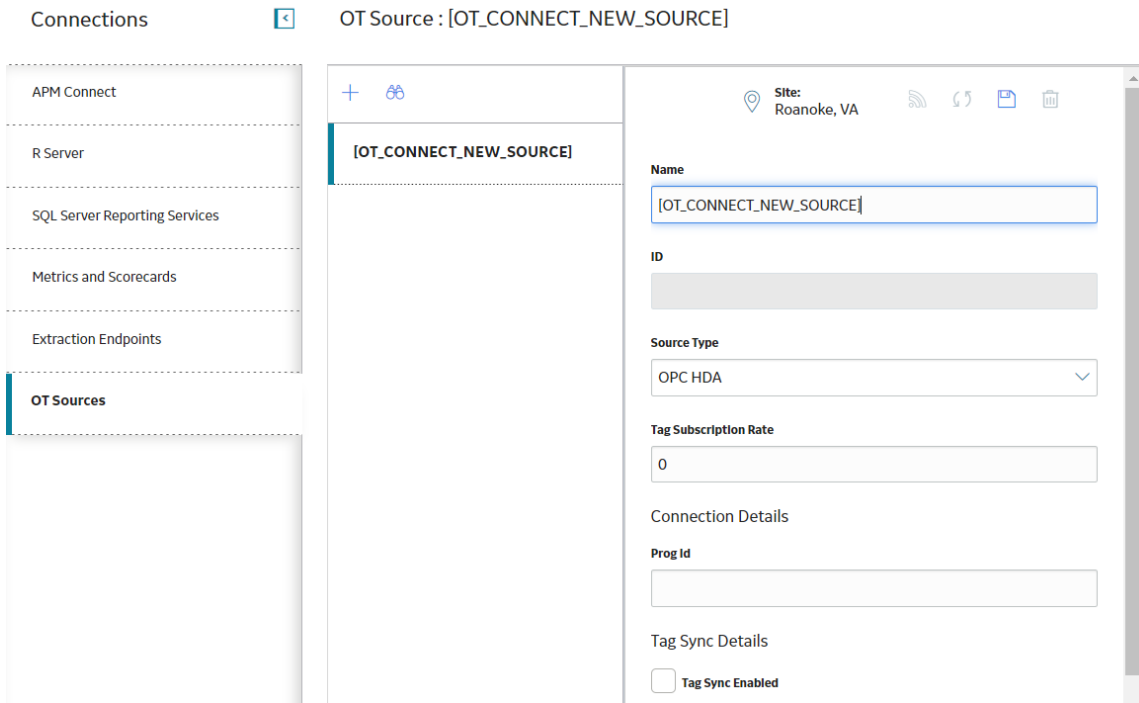
Make sure that you are a part of the MI OT Connect Administrator Security Group.

### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > Connections**.  
The **Connections** page appears, displaying the **APM Connect** workspace.
2. Select **OT Sources**.  
The **OT Source** section appears.



3. Select **+**.  
The **OT Source: <Source\_Name>** page appears.



- Complete the following general details:

**Name**

Define a unique name for the OT Source.

**Source Type**

Select the source type from the available options in the drop-down list.

**Tag Subscription Rate**

Specify the tag subscription rate in minutes.

- Complete the following Connection details:

**Prog Id**

Define the program ID for the OT Source. This field is required if you select the Source Type as OPC-HDA.

- Optional:** Complete the following Tag Sync Details:

**Tag Sync Enabled**

Select this check box if you want to enable Tag Sync.

**Tag Sync Interval**

Define the tag sync interval in minutes.

**Initial Start Time**

Define the time for the initial sync of the tags.

**Tag Filters**

Define Regular Expression filters to exclude Tags you do not want to synchronize.

- Select .

The OT Source record is created.

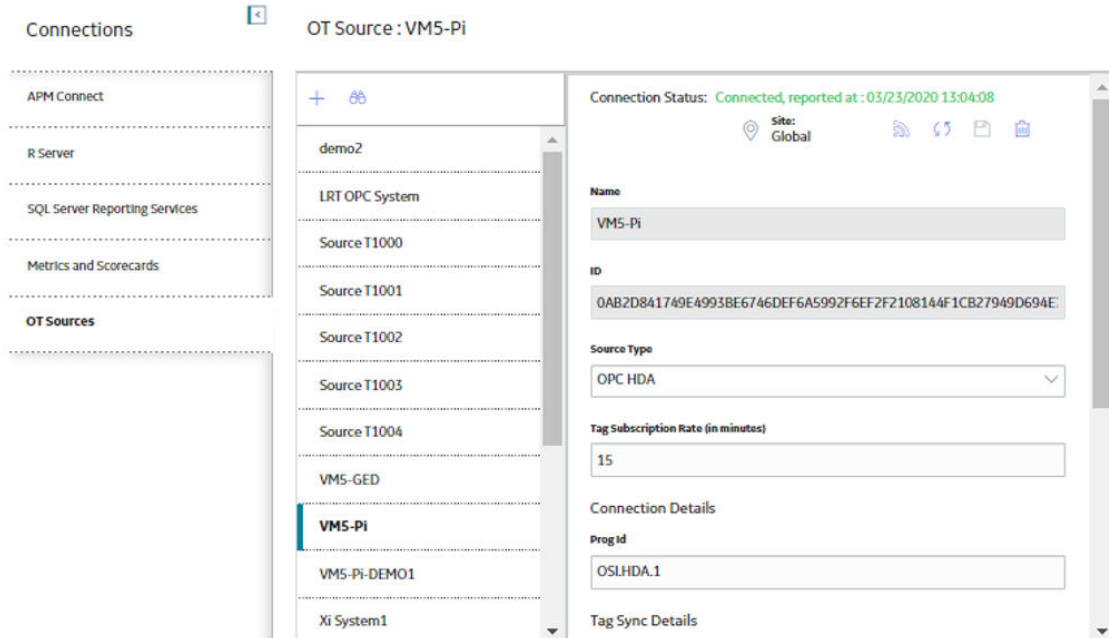
**Note:** Creating an OT Source only defines the configuration of the source. To complete the connection, you must install and configure the OT Connect Adapter Service on the OT Connect Process Data Server. For more information, refer to the Deployment section.


**Note:** If the Adapter or Conductor is offline, the icon will be greyed out.

## Check Source Connection

### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > Connections**.  
The **Connections** page appears, displaying the **APM Connect** workspace.
2. Select **OT Sources**.  
The **OT Source** section appears, displaying all the available OT Sources.



3. In the **OT Sources** pane, select the OT Source for which you want to check the connection.  
The details of the selected OT Source appears.
4. Select  to update the connection status.  
The OT Connect Connection Status is updated, providing a link to display the status information.

**Connection Status:** [Connected, reported at : 03/23/2020 13:04:08](#)

5. **Optional:** On the OT Source header, select the Connection Status link.  
The **Connection Status** window appears, displaying the details of the connection.

### Connection Status

---

**Source Capabilities**  
LastReading, StartToEndReadings, SubscribeReadings

---

✓ **Message Bus**

---

✓ **Protocol Adapter**  
Connected successfully at 3/23/2020 4:18:06 PM

---

✓ **Conductor**

---

Tag Sync	Started at 03/23/2020 13:03:29
Succeeded	Ended at 03/23/2020 13:03:39
Health Subscription Sync	Started at 03/23/2020 13:03:09
Succeeded	Ended at 03/23/2020 13:03:11
Policy Subscription Sync	Started at 03/23/2020 12:16:25
Succeeded	Ended at 03/23/2020 12:16:27

---

Minutes since last Status Report	Source Tags last updated at
0	03/23/2020 13:03:39

OK

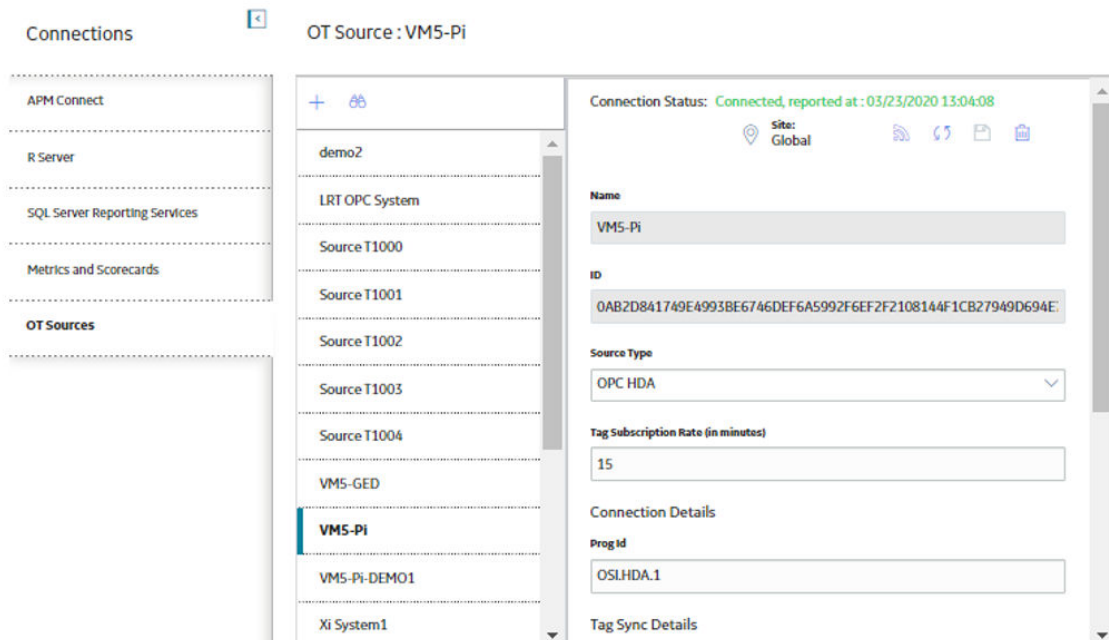
6. Select **OK** to close the window.

## Manually trigger a Tag Synchronization

### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > Connections**. The **Connections** page appears, displaying the **APM Connect** workspace.
2. Select **OT Sources**.

The **OT Source** section appears, displaying all the available OT Sources.



3. In the **OT Sources** pane, select the OT Source for which you want to trigger the tag synchronization. The details of the selected OT Source appears.

4. Select .

The OT Connect Tag Synchronization is requested for the selected OT Source.

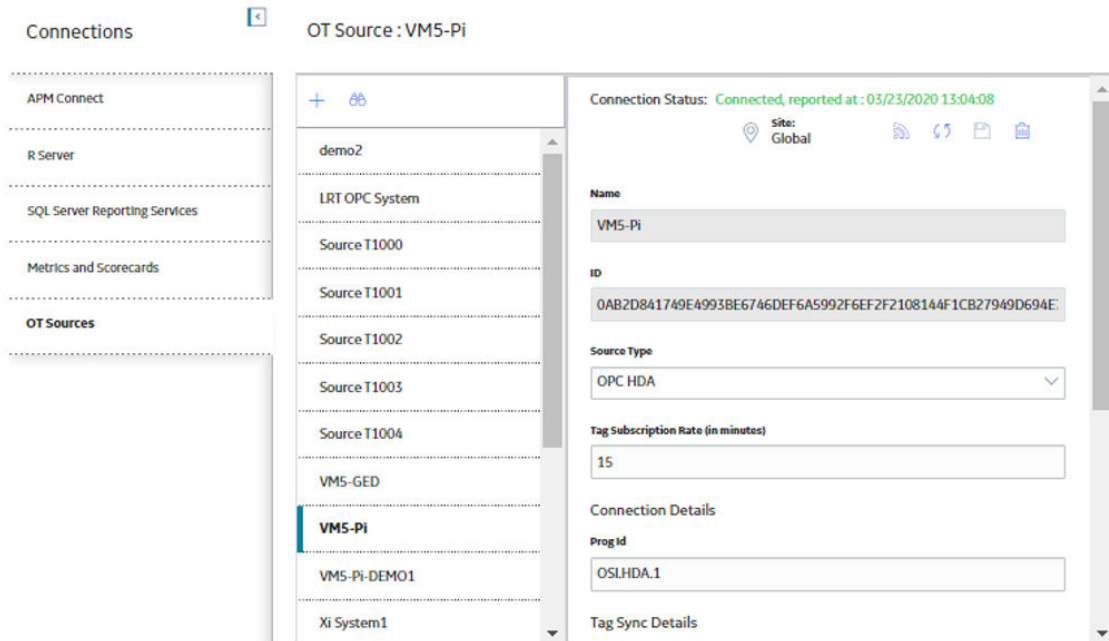
**Note:** If a Tag Synchronization is already running, an error message appears.


## Delete OT Source

### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > Connections**. The **Connections** page appears, displaying the **APM Connect** workspace.
2. Select **OT Sources**. The **OT Source** section appears, displaying all the available OT Sources.





3. In the **OT Sources** pane, select the OT Source that you want to delete. The details of the selected OT Source appears.
4. Select . The selected OT Source is deleted.

**Note:** You cannot delete an OT Source if it is associated with Source Tags. If source tags exist in GE Digital APM, an error message appears.

## OT Connect Tag Browser

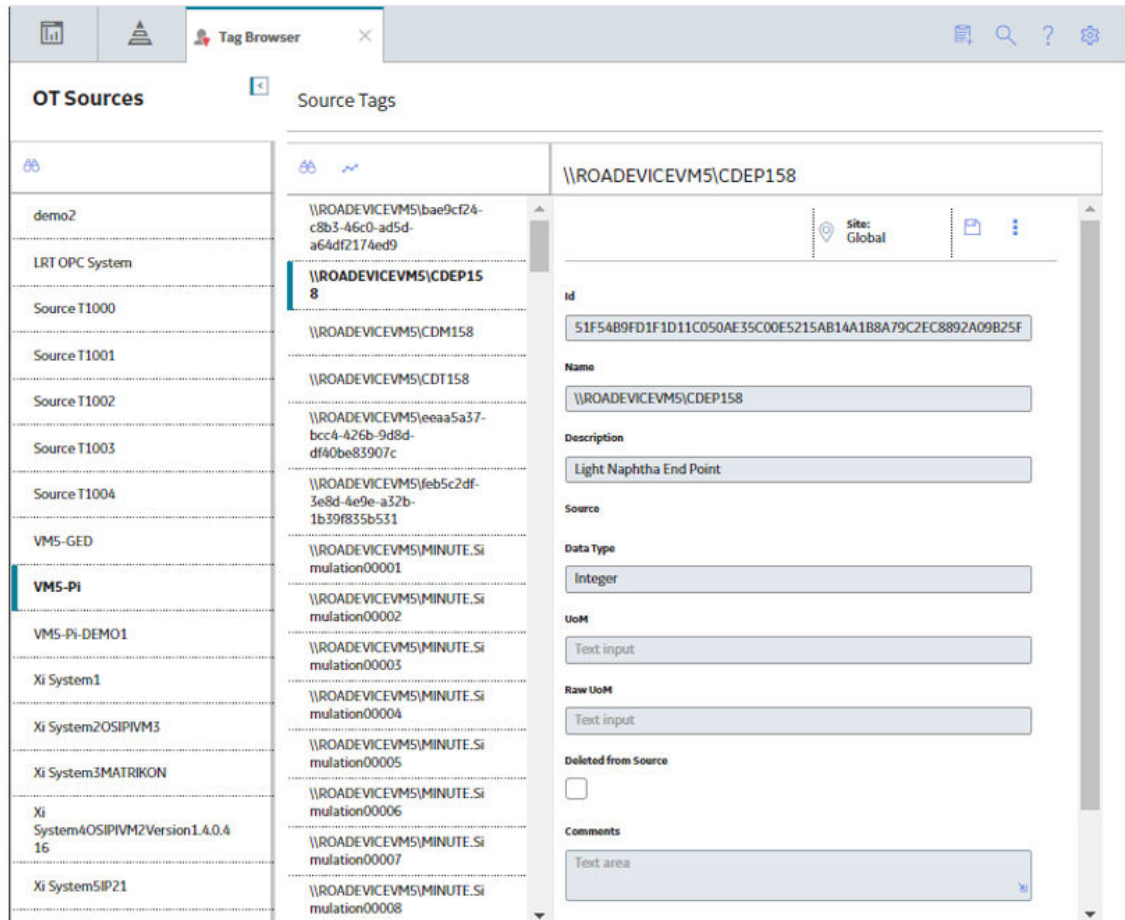
### View Source Tag Attributes in Tag Browser

#### About This Task

The OT Connect Tag Browser allows you to view the attributes of a Source Tag in an OT Source. You can also see a trend chart of readings for the Source tags.

#### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > OT Connect Tag Browser**. The **Tag Browser** page appears, displaying the **OT Sources** workspace.
2. In the left pane, select the desired OT Source. The Source Tags for the selected OT Source appears.
3. Select the Source Tag for which you want to view the attributes. The tag attributes for the selected Source Tag appear in the right pane.



**Tip:** You can select search button (🔍) and enter a source tag name to filter Source Tags by name.

**Note:** You can change the Site for a Source Tag by using the 📍 button and then saving (💾) the record. You cannot modify any other property.

## Visualize a Trend Chart

### About This Task


OT Connect Tag Browser allows you to visualize the Trend Chart for the readings of a Source Tag.

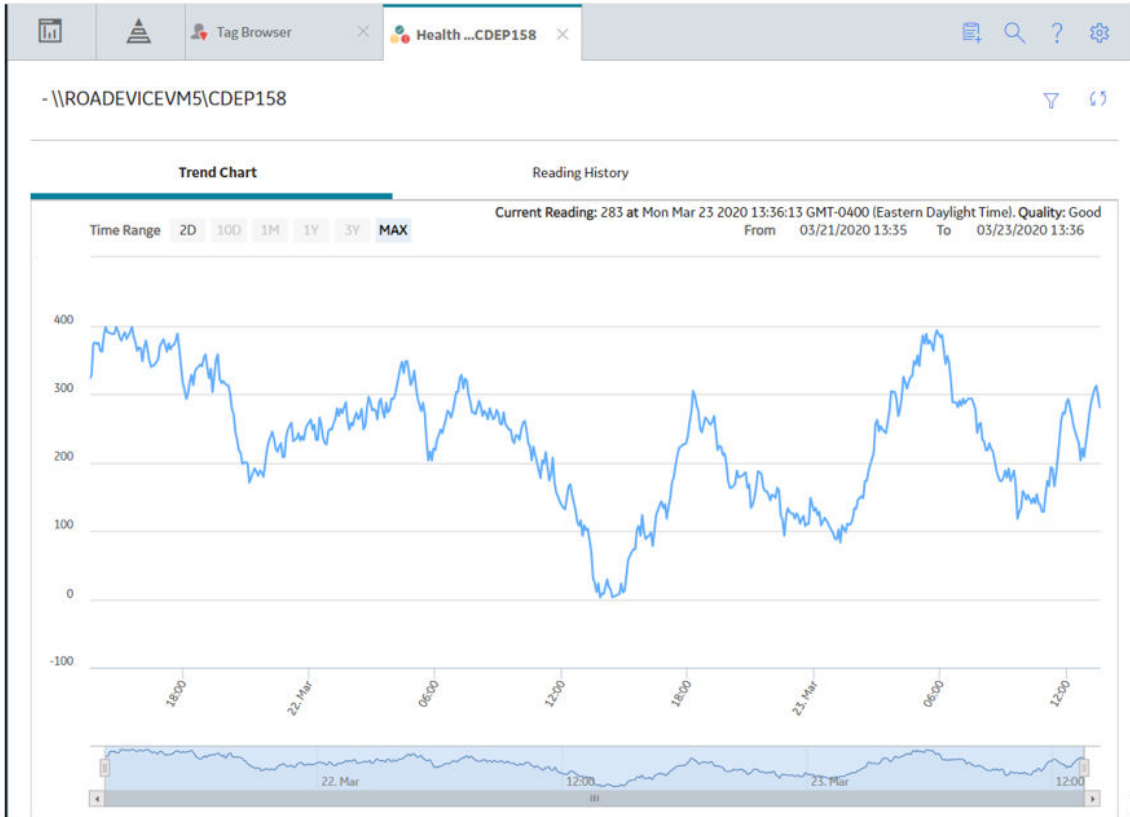
### Procedure

1. In the module navigation menu, select **Admin > Operations Manager > OT Connect Tag Browser**. The **Tag Browser** page appears, displaying the **OT Sources** workspace.
2. In the left pane, select the desired OT Source. The Source Tags for the selected OT Source appears.
3. Select the Source Tag for which you want to visualize the trend chart. The tag attributes for the selected Source Tag appear in the right pane.

The screenshot shows the Tag Browser interface with three main panes:

- OT Sources:** A list of sources including demo2, LRT OPC System, Source T1000, Source T1001, Source T1002, Source T1003, Source T1004, VM5-GED, **VM5-Pi**, VM5-Pi-DEMO1, Xi System1, Xi System2OSIPVM3, Xi System3MATRIKON, Xi System4OSIPVM2Version1.4.0.4 16, and Xi System5IP21.
- Source Tags:** A list of tags for the selected source, including paths like \\ROADEVICEVM5\bae9c24-c8b3-46c0-ad5d-a64df2174ed9 and \\ROADEVICEVM5\CDEP158.
- Tag Details:** A detailed view of the tag \\ROADEVICEVM5\CDEP158, showing fields for ID, Name, Description, Source, Data Type, UoM, Raw UoM, Deleted from Source, and Comments.

- In the header of the center pane, select . The trend chart appears in a new tab.



# Chapter 4

---

## Deployment

### Topics:

- [Upgrade from PDI to OT Connect](#)
- [Deploy OT Connect for the First Time](#)

# Upgrade from PDI to OT Connect

## About This Task

The initial release of OT Connect is in GE Digital APM Version 4.4.0. Although OT Connect is a new module, there are a number of customers who were using the Process Data Integration module in an older version of GE Digital APM. As these customers upgrade to GE Digital APM Version 4.4.0, they will want to upgrade their existing OPC Tags and any Health Indicators or Policies that utilize those tags.

OT Connect includes the OT Connect Upgrade Utility, a console application that can be used to migrate content that previously relied upon Process Data Integration.

During the database upgrade to GE Digital APM Version 4.4.0, the content of the OPC Systems will be migrated to OT Sources, and OPC Tags will be migrated to Source Tags, if they are in use by Health Indicators or Policy Instances. After the database upgrade, and before using Health, Policy or OT Connect, you must run this utility. This utility performs the following:

1. Updates the OT Source Ids
2. Updates the Source Tag Ids
3. Creates Content Map records for every Health Indicator that is linked to an OPC Tag and upgrades those Health Indicators
4. Upgrades Policies that use the OPC Tag node to use the OT Connect Tag node
5. Creates Content Map records for all Policy Instances that reference OPC Tags in OPC Tag nodes and upgrades those Policy Instances.

## Note:

- Policies that use obsolete fields from the OPC Tag node will be upgraded automatically, however these Policies may no longer function as expected and will be deactivated. You can open such upgraded Policies in Policy Designer to review the obsolete field usage and reconfigure the Policies.
- Policies that reference OPC Tag records in Entity nodes or Policy Instances that reference OPC Tag records in Point Value nodes are NOT upgraded automatically.
- The upgrade process identifies any Policies and Policy Instances that cannot be upgraded automatically and adds a warning to the log. Please contact GE Digital Support for advice on modifying any such Policies or Policy Instances to work with the OT Connect module.

## Results

Step	Task	Notes
1	In GE Digital APM, ensure that your new APM OT Connect license has been applied.	<p>This step is required.</p> <p>Apply and verify licenses in Operations Manager &gt; Activate Licenses.</p> <p><b>Note:</b> Your new license must show that APM OT Connect is ACTIVE. And if upgrading from PDI, the OPC Interfaces must also show as ACTIVE.</p>
2	On the GE Digital APM Server, invoke the OTConnectUpgradeUtility.exe executable from the Windows Command Prompt.	<p>This step is required.</p> <p>Locate the OTConnectUpgradeUtility.exe in C:\Program Files\Meridium\OTConnect\Upgrade.</p> <p>Execute the following command, replacing &lt;datasource_id&gt; with the name of the APM Datasource that you wish to connect to and upgrade. Please note that there is a space after datasource.</p> <pre>.\OTConnectUpgradeUtility.exe datasource: &lt;datasource_id&gt;</pre>
3	On the GE Digital APM Server, review the upgrade log and ensure that no errors were logged during the upgrade process.	<p>This step is required.</p> <p>Locate OTConnectUpgradeUtility_APM_&lt;date&gt;.log in C:\ProgramData\Meridium\Logs.</p> <p>You may also need to look into the following two log entries:</p> <pre>Upgrading 312 Health Indicators. 312 Health Indicators were upgraded.</pre> <p>If those two numbers do not match in your log, then some errors have occurred that have prevented the upgrade utility from successfully completing all of the required tasks.</p> <p><b>Note:</b> After resolving any issues reported in the log, re-run the Utility.</p> <p>Warnings will be added to the log in the following circumstances:</p> <ul style="list-style-type: none"> <li>• A Policy uses an obsolete field in an OPC Tag node. The policy will be inactivated.</li> <li>• A Policy uses an Entity node configured to reference the OPC Tag family. The policy will be inactivated.</li> <li>• A Policy Instance references an OPC Tag record in a Point Value node.</li> <li>• A Policy Instance references a record (not limited to OPC Tag records) which is not found in the APM Database. Usually this means that the referenced record was deleted after the Policy Instance was last saved. The invalid reference will be removed.</li> </ul> <p>You may need to redesign the Policy or reconfigure the Policy Instance to work with the OT Connect module, after the upgrade is completed. Consult GE Digital Support for advice.</p>
4	Migrate additional datasources.	Repeat steps 2 and 3 for each datasource that you want to migrate.
5	Once the log has been reviewed and no errors have occurred, the Upgrade is complete.	You are now ready to <a href="#">Deploy OT Connect for the First Time</a> on page 20.

# Deploy OT Connect for the First Time

## Before You Begin

The following table outlines the steps that you must complete to deploy and configure this module for the first time. These instructions assume that you have completed the steps for deploying the basic system architecture.

These tasks may be completed by multiple people in your organization. GE Digital recommends, however, that the tasks be completed in the order in which they are listed.

This GE Digital APM module is not available in the APM Now environment.

## Results

Step	Task	Notes
1	Ensure that your OT Connect Process Data Server and process historian are configured according to the <a href="#">OT Connect System Requirements</a> on page 2.	This step is required.
2	On the OT Connect Process Data Server, <a href="#">Install OT Connect Adapter Service</a> on page 23.	This step is required. The OPC Server must be on the same machine as the OT Connect Adapter Service. You must provide a unique name for each OT Connect Adapter Service on an OT Connect Process Data Server.
3	On the OT Connect Process Data Server, <a href="#">Configure OT Connect Adapter Service</a> on page 24 to update the OT Connect Adapter Service configuration file to include the required properties.	This step is required. The configuration file for an OT Connect Adapter Service is located in C:\Program Files\Meridium\OTConnect\Adapters\{name}\appsettings.json.
4	On the OT Connect Process Data Server, start the OT Connect Adapter Service.	This step is required. When you start the service, the OT Connect Adapter Service attempts to connect and logs any errors. The log file for this service is located in C:\Program Files\Meridium\OTConnect\Adapters\{name}\Logs.
5	On the GE Digital APM server, verify the <a href="#">Message Bus Settings</a> .	<ul style="list-style-type: none"> <li>• <a href="#">Configure ActiveMQ</a></li> <li>• <a href="#">Configure Redis</a></li> </ul>
6	On the GE Digital APM server, <a href="#">Install OT Connect Conductor Service</a> on page 25.	This step is required. <b>Note:</b> The Conductor does not require any additional configuration.



Step	Task	Notes
7	On the GE Digital APM server, start or restart the OT Connect Conductor Service.	This step is required. You may review the log files for this service at C:\ProgramData\Meridium\Logs.
8	In GE Digital APM, Assign Security Users to one or more of the <a href="#">Security Groups and Roles</a> .	This step is required.
9	In GE Digital APM, <a href="#">Create an OT Source</a> to the OPC-compliant system from which you want to retrieve data.	This step is required.
10	In GE Digital APM, <a href="#">Check Source Connection</a> on page 10 to verify the status of the configured OT Source.	This step is required. The status includes Connection Status to all the required components for the OT Source <a href="#">Connection Status</a> . If the status returns with errors, follow <OT Connect Troubleshooting Guide> for help.
11	In GE Digital APM, <a href="#">Manually trigger a Tag Synchronization</a> on page 11 for the OT Source.	This step is required. You can monitor the status of the Source Tag Synchronization <a href="#">Connection Status</a> .
12	In GE Digital APM, <a href="#">Visualize a Trend Chart</a> on page 14 for a desired Source Tag.	This step is optional.
13	Complete desired content commissioning as necessary to manage the Source Tags imported into GE Digital APM. For example, create Health Indicators through the OT AHI Connector page, or attach Source Tags to Policy Instances through Policy Designer. For more information, refer to the respective documentation.	This step is optional.

# Chapter 5

---

## Install and Configure OT Connect Services

### Topics:

- [Install OT Connect Adapter Service](#)
- [Configure OT Connect Adapter Service](#)
- [Install OT Connect Conductor Service](#)

# Install OT Connect Adapter Service

## Before You Begin

The OT Connect Adapter requires third party drivers to launch certain Protocol Adapters.

## OPC Classic DA and HDA

You must perform the following steps to install the 64-bit OPC Core Components on the OT Connect Process Data server:

1. On the machine that will serve as the OT Connect Process Data Server, access the GE Digital APM distribution package, and then navigate to the `\V4.4.0.0_3rd_Party_Software\OPC Core Components` folder.
2. Double-click on OPC Core Components Redistributable (x64) 3.00.108.msi.
3. Select **I Agree** to accept the license.
4. Select **Next** on the following windows to accept the default selections, and install the software.
5. Close the installer.

## About This Task

This topic provides detailed instructions on installing the OT Connect Adapter Service using the OT Connect installer.

## Procedure

1. On the system that will serve as the OT Connect Process Data Server, access the GE Digital APM distribution package, and then navigate to the `\Setup\OTConnect` folder.
2. Double-click on the `Setup.exe` file.

**Note:** If an OT Connect Adapter Service is already installed on this server, the **Existing Installed Instances Detected** screen appears.

3. Select **Next** to accept and Install a new instance of this application.  
The **Welcome** screen appears.
4. Select **Next**.  
The **License Agreement** screen appears.
5. Read the License Agreement and, if you agree, select the **I accept the terms of the license agreement** check box, and then select **Next**.
6. The **Instance Name** window appears.

**Note:** The Instance Name is only used by the operating system to distinguish multiple adapters installed on the same OT Connect Process Data Server.

7. Enter a unique name related to the OT Source you want to connect this OT Connect Adapter Service to.

**Note:** The instance name is not linked to the OT Source Name in any way. Rather, it is the unique-per-service ID that is used to give each adapter a unique name:

- Folder
- Windows Service
- Add/Remove programs entry

It is recommended that the name given should be related to the server indicated in order to make troubleshooting easier.

8. Select **Next**.
9. Select **Install**.  
The **Setup Status** window appears, displaying a progress bar that shows the progress of the installation process. After the progress bar reaches the end, a message appears, indicating that your server is being configured. After your server is configured, the **Installation is Complete** window appears.
10. Select **Finish**.  
The installation is complete.

## Configure OT Connect Adapter Service

### About This Task

To use OT Connect Adapters, you must configure each OT Connect Adapter Service by modifying the `appsettings.json` configuration file on the OT Connect Process Data Server.

You can make the modifications by opening the file in an application that can modify JSON text (for example, Notepad). The following instructions provide details on making all required modifications at one time using the text editor.

**Note:** This configuration file defines several endpoints on the GE Digital APM Server with URLs and ports that must be accessible from the OT Connect Process Data Server. Ensure that your firewalls are configured to allow this access.

### Procedure

1. On the OT Connect Process Data Server, open the `<Install_Location>/appsettings.json` file.
2. Modify the configuration sections as described in the following table:

Within this section...	Make this change	Notes
Adapter	Replace <code>TenantId</code> with the name of the GE Digital APM database to which you want to connect.	None
OtSource	Replace <code>Name</code> with a descriptive identifier for this Process Historian Source.	This Name must eventually match that of an OT Source system defined in the GE Digital APM Database chosen above.
QueueOptions	Set <code>ActiveMqHost</code> with the fully qualified network address of the server that hosts the ActiveMQ Message Bus.	Typically, the Host of the ActiveMQ Message Bus is the GE Digital APM Server.
	Set <code>ActiveMqPort</code> with the appropriate port of the ActiveMQ host.	The default port is 61616.
	Set <code>Username</code> with the user Id of an authorized user of the ActiveMQ instance on the MqHost.	
	Set <code>Password</code> with the encrypted secret of the desired user Id of the ActiveMQ instance on the MqHost.	
CacheOptions	Replace <code>Host</code> with the fully qualified network address of the server that hosts the Redis cache instance.	Typically, the Host of the Redis cache instance is the GE Digital APM Server.

Within this section...	Make this change	Notes
	Set <code>Port</code> to the defined port of the Redis cache instance.	The default port is 6379.
	Set <code>Password</code> to the Password of the Redis cache instance, if any.	By default, the password is blank.

## Install OT Connect Conductor Service

### About This Task

This topic provides detailed instructions on installing the OT Connect Conductor Service using the GE Digital APM Server and Add-ons installer.

### Procedure

1. On the GE Digital APM Server, access the GE Digital APM distribution package, and then navigate to the `\\Setup\Meridium APM Server and Add-ons` folder.
2. Double-click on the `Setup.exe` file.  
The **Welcome** window appears.
3. Select **Next**.  
The **License Agreement** window appears.
4. Read the License Agreement and, if you agree, select the **I accept the terms of the license agreement** check box, and then select **Next**.  
The **Select Installation Location** screen appears.
5. Select **Next** to accept the default location.  
The **Select the features you want to install** window appears.
6. Select the **OT Connect Conductor Service** option.

**Note:** While additional options are available for selection, these options are not meant to be installed on the GE Digital APM Server at this time. These instructions assume that you want to install only the OT Connect Conductor Service.

7. Select **Next**.
8. Select **Install**.  
The **Setup Status** window appears, displaying a progress bar that shows the progress of the installation process. After the progress bar reaches the end, a message appears, indicating that your server is being configured. After your server is configured, the **Installation is Complete** window appears.
9. Select **Finish**.  
The installation is complete.

# Chapter 6

---

## References

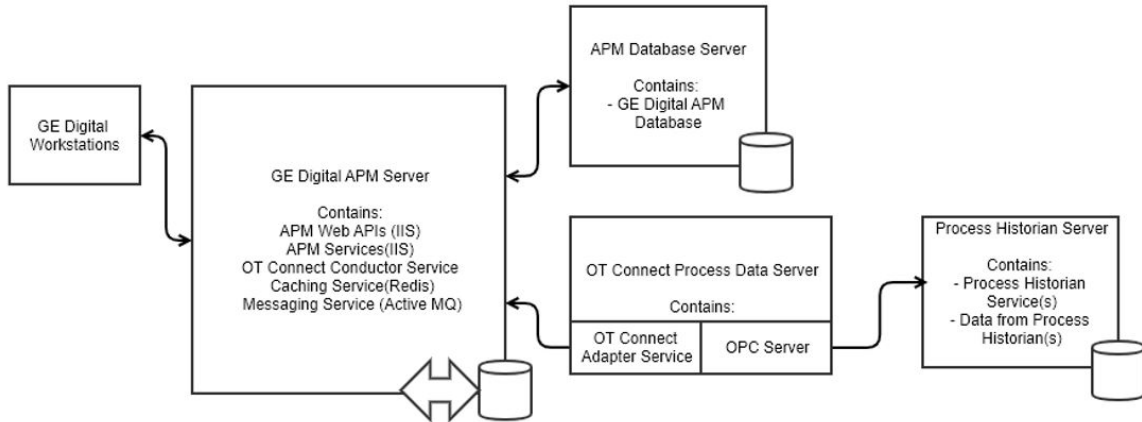
### Topics:

- [OT Connect System Architecture](#)
- [Data Model](#)
- [Security Groups and Roles](#)
- [Site Filtering](#)
- [Working with Connection Status](#)
- [About Importing and Synchronizing Tags](#)
- [Working with Configuration Files](#)
- [Working with Logging](#)
- [Working with the OT Source Capability Utility](#)
- [Working with Protocol Adapters](#)

# OT Connect System Architecture

## OT Connect System Architecture

The following image shows how these machines should be incorporated into the basic GE Digital APM system architecture:



The Conductor requires access to the GE Digital APM Datasource(s), so it should be installed on the GE Digital APM Server with the other services.

Each OT Connect Adapter Service can connect a single Process Historian or OPC Server to a single GE Digital APM Datasource, so your solution may require multiple OT Connect Adapter Services, installed on the same or different servers.

**Important:** Do not configure more than one Adapter with the same OT Source Name.

The OT Connect Adapter Service does not require any inbound connections, only outbound connections to the Message Broker and Cache services, allowing the OT Connect Process Data Server to be deployed within a DMZ or OT Network without compromising security.

### Required Server Ports

To ensure successful communications between GE Digital APM and OT Connect, make sure the listed ports are open.

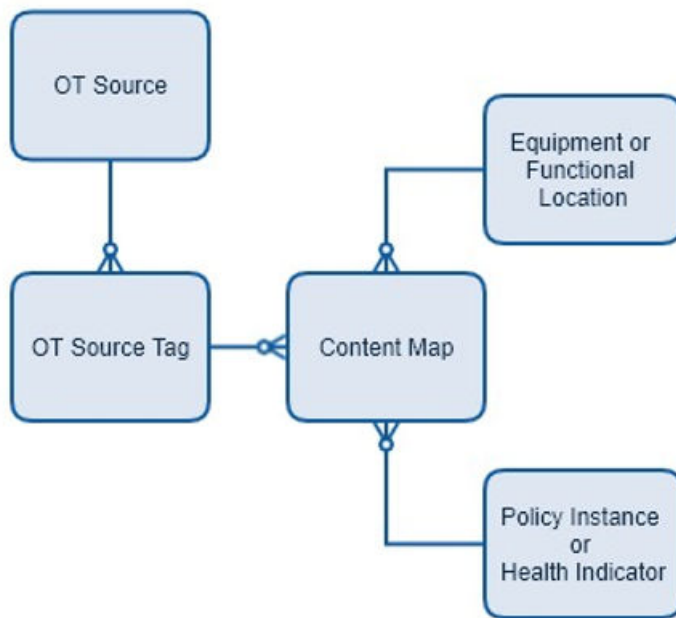
Feature	Firewall Port	From	To
Tag and Subscription Synchronization	Configurable; 1433 for a default SQL Server.  Additional ports as required by the chosen Authentication scheme	OT Connect Conductor	APM Database
Tag and Subscription Synchronization	Configurable; 6379 by default	OT Connect Conductor	Redis Server
Tag and Subscription Synchronization	Configurable; 61616 by default	OT Connect Conductor	ActiveMQ Server

Feature	Firewall Port	From	To
All connectivity for that OT Source	Configurable; 6379 by default	OT Connect Adapter	Redis Server
All connectivity for that OT Source	Configurable; 61616 by default	OT Connect Adapter	ActiveMQ Server

## Data Model

### Data Model

The following image represents the Data Model for OT Connect.



#### OT Source: Source of Tags and Tag Value from the Edge

The following table provides a list and description of the fields that exist in the OT Source family and are available on the baseline OT Source datasheet. The information in the table reflects the baseline state and behavior of these fields. If your implementation has been customized, these fields may behave differently, and fields in addition to those listed here may be available.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site and will then only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Site Filtering section of the documentation.



Field Caption/ID	Data Type	Description	Behavior and Usage
MI_OTSRC_ID_C	Character	Unique Identifier	None
MI_OTSRC_CONN_DEF_T	Text	Connection Configuration	Reserved for future use
MI_OTSRC_TYPE_C	Type	Text	This field is a selection from a predefined list. Options include OPC HDA and Simulation
MI_OTSRC_NAME_C	Character	Name	None
MI_OTSRC_LAST_UPDT_D	Date	Last Update Time	None
MI_OTSRC_LAST_SYNC_D	Date	Last Sync Time	None
MI_OTSRC_SYNC_RATE_N	Numeric	Minutes between Tag Synchronizations	None
MI_OTSRC_CAPABILITY_N	Numeric	Capability	Bit Flags
MI_OTSRC_SYNC_DEF_T	Text	Synchronization Configuration	JSON
MI_OTSRC_SUB_RATE_N	Numeric	Default Subscription Rate	None

### Source Tag: Tag definition from Source on the Edge

The following table provides a list and description of the fields that exist in the Source Tag family and are available on the baseline Source Tag datasheet. The information in the table reflects the baseline state and behavior of these fields. If your implementation has been customized, these fields may behave differently, and fields in addition to those listed here may be available.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site and will then only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Site Filtering section of the documentation.

Field Caption/ID	Data Type	Description	Behavior and Usage
MI_SRCTAG_ID_C	Character	Unique Identifier	None
MI_SRCTAG_NAME_C	Character	Name	Unique name in Process Historian
MI_SRCTAG_DESC_C	Character	Description	
MI_SRCTAG_ITEM_C	Character	-	Reserved for future use
MI_SRCTAG_COMMENTS_T	Text	Comments	
MI_SRCTAG_UOM_C	Character	UoM	Reserved for future use
MI_SRCTAG_RAW_UOM_C	Character	Raw UoM	UoM string reported by Process historian
MI_SRCTAG_EXT_PROPS_T	Text	Extended Properties	
MI_SRCTAG_DELETED_B	Boolean	This Tag was deleted from the OT Source	

Field Caption/ID	Data Type	Description	Behavior and Usage
MI_SRCTAG_DATA_TYPE_C	Character	Data Type	This field is a selection from a predefined list. Options include Boolean, Integer, Decimal, String, Timespan, DateTime
MI_SRCTAG_HS_OTSRC_FK_N	Numeric	OT Source Entity Key	Foreign Key to OT Source Records family
MI_SRCTAG_MIGR_FMLY_KEY_C	Character	Migrated Tag Family Key	Used for upgrade from MI_TAG based families (OPC Tag, GE Tag, AMS Tag)
MI_SRCTAG_MIGR_ENTY_KEY_C	Character	Migrated Tag Entity Key	Used for upgrade from MI_TAG based families (OPC Tag, GE Tag, AMS Tag)

### Content Map: The relationships between content and sources

The following table provides a list and description of the fields that exist in the Content Map family and are available on the baseline Content Map datasheet. The information in the table reflects the baseline state and behavior of these fields. If your implementation has been customized, these fields may behave differently, and fields in addition to those listed here may be available.

Field Caption/ID	Data Type	Description	Behavior and Usage
MI_CONTMAP_ID_C	Character	Unique Identifier	None
MI_CONTMAP_TMPLT_NAME_C	Character	-	Reserved for future use
MI_CONTMAP_UOM_C	Character	UoM	Reserved for future use
MI_CONTMAP_LMT_DEFS_T	Text	Limit Definitions	JSON
MI_CONTMAP_TRIGGER_B	Boolean	-	Reserved for future use
MI_CONTMAP_REQ_CAP_N	Numeric	OT Source Capabilities Required by this Content	Bit flags
MI_CONTMAP_EQUIP_FK_N	Numeric	Equipment Key	Foreign Key to Equipment Record
MI_CONTMAP_FLOC_FK_N	Numeric	Functional Location Key	Foreign Key to Functional Location Record
MI_CONTMAP_SRCTAG_FK_N	Numeric	Source Tag Key	Foreign key to Source Tag record

# Security Groups and Roles

## Security Groups and Roles

The following table lists the baseline Security Groups available for users within this module, as well as the baseline Roles to which those Security Groups are assigned.

**Important:** Assigning a Security User to a Role grants that user the privileges associated with all of the Security Groups that are assigned to that Role. To avoid granting a Security User unintended privileges, before assigning a Security User to a Role, be sure to review all the privileges associated with the Security Groups assigned to that Role. Also, be aware that additional Roles, as well as Security Groups assigned to existing Roles, can be added via Security Manager.

Security Group	Roles
MI OT Connect Administrator	MI OT Connect Admin MI Health Admin
MI OT Connect Viewer	MI Health User MI Health Power MI OT Connect User
MI Content Template User	MI Health Admin MI OT Connect Admin
MI Content Template Viewer	MI Health User MI Health Power MI OT Connect User

The baseline family-level privileges that exist for these Security Groups are summarized in the following table.

Family	MI OT Connect Administrator	MI OT Connect Viewer
OT Source	View, Update, Insert, Delete	View
Source Tag	View, Update, Insert, Delete	View

Family	MI Content Template User	MI Content Template Viewer
Content Map	VIEW, INSERT, UPDATE, DELETE	View

## Site Filtering

### Site Filtering

The OT Source family uses the GE Digital APM Site Filter Control. When an OT Source record is created, it is assigned as Global. If the record is not reassigned to a specific site, then the user will always see the global record. For more information, refer to the Site Filtering section of the documentation.

**Note:** Only a Super User can modify the site assigned to an OT Source record. A user can modify the site assignment to a newly created connection record. However, once the user saves the system, it is no longer modifiable by a non-super user.

The OT Source is used to facilitate the transfer of records from your Process Historian server into GE Digital APM. Specifically, Source Tags are transferred into GE Digital APM. The records that are associated with the data source are assigned to Global when they are initially transferred into GE Digital APM.

The content Maps are foundational records that are used to map Source Tags to Equipment, Functional Locations, Health Indicators, and/or Policy Instances. The content Maps will inherit the site of the asset within the record.

## Working with Connection Status

### Working with Connection Status

An OT Source depends on multiple services in order to support its full functionality, and the Connection Status display is intended to allow you to quickly identify any loss of connectivity with your OT Sources.

In order to support subscriptions and Reading requests, the OT Connect Adapter Service must be running and must be able to do the following:

- Connect to Redis.
- Connect to ActiveMQ.
- Connect its Protocol Adapter to the configured Process Historian or OPC Server.

In order to acquire configuration from GE Digital APM on startup, or support Source Tag Synchronization, the OT Connect Conductor Service must also be running.

The top of the Connection Status page block shows the supported Capabilities and the status of each of these required components

#### Connection Status

---

##### Source Capabilities

All

---

✓ Message Bus

---

✓ Protocol Adapter  
Connected successfully at 3/9/2020 4:13:46 PM




---

✓ Conductor

---

**Note:** Redis is used to cache the status report, so the entire report will become Stale if the OT Connect Adapter Service is unable to connect to Redis.

Components can show the following three icons:

Icon	Description
	Available and connected.
	Status is stale, but had no issues in the last report.
	An issue was found when the status was last reported.

The bottom of the page shows the following information:

- The status of Tag and Subscription synchronization jobs.
- How recently Status has been reported.
- The last time Source Tags were updated by Tag Synchronization.

Tag Sync	Started at 2020-03-12T14:26:35.101
Succeeded	Ended at 2020-03-12T14:29:07.538
Health Subscription Sync	Started at 2020-03-12T14:26:47.247
Succeeded	Ended at 2020-03-12T14:26:49.558
Policy Subscription Sync	Started at 2020-03-12T14:26:44.210
Succeeded	Ended at 2020-03-12T14:26:46.421

Minutes since last Status Report	Source Tags last updated at
0	2020-03-12T14:29:06.507

## About Importing and Synchronizing Tags

### About Importing and Synchronizing Tags

After you schedule or trigger OT Connect Tag Synchronization, tags from the configured process historian are imported automatically into the GE Digital APM database as Source Tag records. These Source Tag records are synchronized regularly with the OPC Server or historian at a defined frequency. The first time that the synchronization occurs, a Source Tag record is created in the GE Digital APM database for each tag in the process historian based on defined filtering criteria.

Each subsequent time that the synchronization occurs, Source Tag records are created, modified, or flagged as removed, based on changes in the process historian as compared to the existing Source Tag data in the GE Digital APM Database.

**Note:** Importing the Source Tags alone will not enable functionality. Source Tags must have content defined by either a Policy Instance or a Health Indicator, along with an optional asset (Equipment or Functional Location) before they can be used in the GE Digital APM workflows.

Source Tag records are created, modified, or flagged as removed as follows:

- If a new tag was added to the process historian, a corresponding Source Tag record is created in the GE Digital APM database.
- For a previously imported Source Tag, if certain attributes were changed in the process historian, the corresponding Source Tag record is updated automatically. If a previously imported tag no longer exists in the process historian, the Source Tag record is marked as Deleted from Source, and is no longer displayed in the UI or used in subscriptions, but the record will remain in GE Digital APM database. The content that is already linked to the tag will fail when it attempts to get data for the tag.
- If the tag is restored in the process historian, the next scheduled synchronization will set the Deleted from Source field on the Source Tag record to false, it will return to the UI and subscriptions, and any pre-existing content will function again.

## Working with Configuration Files

### Working with Configuration Files

#### Conductor

Like other GE Digital APM Services on the App Server, most of the configuration should be done through MeridiumAppSettings.xml to ensure that all the services share a common configuration.

In this release, the only exception is [Logging](#), which is best configured via the appsettings.json file in C:\Program Files\Meridium\OTConnect\Conductor.

#### Adapter

As Adapters are typically installed on an OT Connect Process Data Server without other GE Digital APM services, they do not require the MeridiumAppSettings.xml file. However, if that file is present, any settings in it will be used by all installed Adapters by default.

**Note:** It is recommended that Adapters are installed on a server that does not include the C:\ProgramData\Meridium directory, so that their configuration and logging can be kept isolated, simplifying troubleshooting of an individual OT Source and Adapter.

Typically all the settings will be configured within C:\Program Files\Meridium\OTConnect\Adapter \<SourceName>, including [Logging](#).

An OT Connect Adapter Service needs to connect to ActiveMQ and Redis, and identify itself to GE Digital APM:

**Table 1: Adapter**

Field	Description	Default	Example	Required?
TenantId	Datasource Id	-	V4040000_QA	Yes
OtSource.Name	Name of the Source; must be unique across the tenant and exactly match the OT Source Name configured in GE Digital APM.	-	Source T1002	Yes

**Table 2: MessageBus.QueueOptions**

Field	Description	Default	Example	Required?
ActiveMqHost	IP or hostname of ActiveMQ broker	-	Myappserver	Yes
ActiveMqPort	Port the ActiveMQ broker is listening on	-	61616	Yes
Username	Username for ActiveMQ	-	Admin	Yes
Password	Password for ActiveMQ user	-	P@55w0rd	Yes
FailoverHosts	Array of ActiveMqHosts to use for failover in a clustered environment	-	["myappserver1", "myappserver2"]	No
MqSslSettings.UseSsl	Use SSL to secure the connection to ActiveMQ	false	true	No

**Table 3: MessageBus.CacheOptions**

Field	Description	Default	Example	Required?
Host	IP or hostname of the Redis server	localhost	myappserver	Yes
Port	Port the Redis server is listening on	6379	6379	No
Password	Password for Redis	-	P@55w0rd	No
ConnectionTimeout	Timeout when opening a connection	3000	3000	No
SyncTimeout[WS1]	Timeout for Redis operations- when working with large data, it's recommended to increase this value	500	15000	No
Ssl	Use SSL to secure the connection to Redis	false	true	No

## Example

```
"Adapter": {
  "TenantId": "V4040000_QA",
  "OtSource": {
    "Name": "Source T1002",
  }
},
"MessageBus": {
  "QueueOptions": {
    "ActiveMqHost": "App Server hostname or IP",
    "ActiveMqPort": 61616,
    "Username": "admin",
    "Password": "admin"
  },
  "CacheOptions": {
    "Host": "App Server hostname or IP",
    "SyncTimeout": 15000
  }
}
```

## Working with Logging

### Working with Logging

By default, GE Digital APM OT Connect services will log all WARN level messages to a logfile corresponding to that service.

If you need more detailed or targeted logs, you can add any number of blocks to the Logging array in appsettings.json.

**Table 4: Logging**

Field	Description	Default	Example	Required?
Pattern	Wildcard pattern corresponding to the subcomponent being troubleshot	*	APM.Messagbus.*	No
LoggingLevel	Standard logging level to capture in the target log	Warn	Debug	No
LoggingMode	Log in human-readable Text, machine readable Json, or All(in separate files)	All	Text	No

## Example

```
"Logging": [
  {
    "Pattern": "*",
    "LoggingLevel": "Debug",
    "LoggingMode": "All"
  }
]
```



```
}  
]
```

## Working with the OT Source Capability Utility

### Working with the OT Source Capability Utility

The OT Source Capability Utility provides the option of interrogating a Process Historian or OPC Server to ensure it is available and determine which Capabilities it can support.

The OT Source Capability Utility is run from the command line, using the same executable as the OT Connect Adapter Service, but different configuration options. It will ignore all MessageBus and GE Digital APM settings, and will not attempt to make any connection to GE Digital APM.

1. Open `C:\Program Files\Meridium\Services\OTConnect\Adapters\{name}\appsettings.json` in a text editor, and configure it to connect to the process historian or OPC server you wish to investigate.
2. Open a Command Prompt, and invoke `C:\Program Files\Meridium\Services\OTConnect\Adapters\{name}\APM.OTConnect.Adapter.exe check`.

**Note:** If you are connecting to an OPC-HDA server, you must ensure that the command prompt is running in the same user as that of the OPC-HDA server.

3. Review the report

```
2020-03-12 14:47:22.8892|WARN|APM.OTConnect.BusinessLogic.Adapter.Checker|{  
  "SupportedCapabilities": "LastReading, StartToEndReadings, SubscribeReadings",  
  "Details": {  
    "ForTestTag": "\\ROADEVICEVM5\\MINUTE.Simulation00001",  
    "TagMetadata": {  
      "Name": "\\ROADEVICEVM5\\MINUTE.Simulation00001",  
      "DataType": "String",  
      "Description": "random string",  
      "RawUoM": null  
    },  
    "LastReading": {  
      "Value": "ABCDE",  
      "DateTime": "2020-03-12T18:47:21Z",  
      "IsGoodQuality": true  
    },  
    "ReadingsStartEndCount": 1783,  
    "ReadingsBeforeEndCount": 0  
  },  
  "DoesNotSupport": "BeforeEndReadings"  
}
```

This report shows that we have successfully connected to the configured OPC-HDA server, and received both metadata and Readings for the provided TestTag.

This server supports all available OPC-HDA Capabilities.

Another use case for the OT Source Capability Utility is to run it without providing ProtocolConnection, in order to discover what ProgIds are available. Some of the examples are listed below:

#### Found Local Historical Data Access 1.XX Servers:

**Proficy.Historian.HDA**

**OSI.HDA.1**

## OT Source Capability Utility configuration

**Table 5: Adapter**

Field	Description	Default	Example	Required?
OtSource.Type	Type of the ProtocolAdapter to test with.	-	OpcHda	Yes
OtSource.ProtocolConnection	ProtocolAdapter specific configuration	-	"ProgId": "Proficy.Historian.HDA"	Yes
TestTag	Exact name of a Tag in the Process Historian to test against	-	SERVERNAME.Simulation00001	No

For example,

```
{
  "Adapter": {
    "OtSource": {
      "Type": "OpcHda",
      "ProtocolConnection": {
        "ProgId": "Proficy.Historian.HDA"
      }
    },
    "TestTag": "FIFTEENMIN.Simulation00001"
  }
}
```

## Working with Protocol Adapters

### Working with Protocol Adapters

#### About

The GE Digital APM OT Connect Adapter Service can support several different Protocol Adapter modules, depending on the configuration of the corresponding OT Source. These Protocol Adapters are used to connect to a specific Process Historian or a server that complies with an OPC specification.

The OT Connect Adapter Service will configure and start the Protocol Adapter matching the Type and Protocol Connection parameters configured on the OT Source on the following:

- Service Start
- When the OT Source is reconfigured

#### Capabilities

Different Protocol Adapters, and even in some cases different implementations or versions of a Process Historian or OPC Server can support a variety of different capabilities when querying or subscribing to data.

The supported capabilities are listed on the table below:

Name	Supported action
LastReading	Query the OT Source for the last good Reading for a Tag.
StartToEndReadings	Query the OT Source for all Readings between a Start and End time.
SubscribeReadings	Establish a subscription to new Readings for a Tag, which can be used to update Health Indicators or trigger Policy Instances unsolicited.
BeforeEndReadings	Query the OT Source for a specified number of readings before an End time.
SubscribeReadings	Subscribe to a Tag for updated Readings with a new Timestamp or Value.

The Capabilities of an OT Source are reported as part of the Connection Status.

### Simulation

The Simulation Protocol Adapter is provided for testing and exploration. Rather than connecting to an actual process historian, it provides simulated tag metadata and Readings for all Capabilities.

#### *ProtocolConnection*

The Simulation Protocol Adapter is not configurable.

### OPC-HDA

The OPC-HDA Protocol Adapter can connect to OPC Classic HDA 1.20 servers installed on the same server as the OT Connect Adapter Service.

Vendors have implemented different elements of the specification, so it is important to review the Connection Status or **OT Source Capability Utility** report to understand what Capabilities are available from the server you want to integrate with GE Digital APM.

A fully supported OPC server can provide the following:

- LastReading
- SubscribeReadings
- GetStartEndReadings

#### *ProtocolConnection*

The OPC-HDA ProtocolAdapter requires the **ProgId** to be configured.

If the correct ProgId is not provided, the ProtocolAdapter will log an exception report on all available OPC-HDA ProgIds on the server on startup.

# Chapter 7

---

## Glossary

### Topics:

- [Glossary](#)

## Glossary

Term	Definition
APM OT Connect Conductor	Service to manage Adapters & execute Source Tag and Subscription Syncs
APM OT Connect Adapter	Adapter translates supported Client protocols to the OT Connect Redis/ActiveMQ based transports
Protocol Adapter	The Component within the APM OT Connect Adapter that allows it to communicate with a specific OT protocol, such as OPC-HDA Classic
Process Historian	Specialized databases used for recording real-time process data, such as temperature or pressure. EX: OSI Pi, Honeywell PHD, GE Digital Historian
OPC Server	OPC Classic service allowing standards-based access to a Process Historian
OT Connect Process Data Server	A Windows Server with both OPC Server(s) and APM OT Connect OT Connect Adapter Service(s) are installed, allowing APM to communicate with on or more Process Historians
OT Source	An APM Record representing a Process Historian
Source Tag	Tag from a Process Historian
Content Map	Relationship between Source Tag and (consumer and/or asset), with properties. modeled as an Entity Family
Reading	Time series style point of data for a tag (timestamp, value, quality)