

Pilot project workbook

Read the guides, clarify the project questions and complete the worksheet with your team.

01 Your first IT/OT integration pilot: scope to acceptance

Start with one production line. Define data ownership, measurable acceptance criteria and failure scenarios before scaling an integration.

02 Commissioning handover: from working flow to operable system

Make an integration maintainable with a handover package covering backups, monitoring, access and incident ownership.

03 Project worksheet

Space for meeting notes, owners and acceptance evidence.

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This workbook is a planning aid. Product version, plug-in availability and licence scope must be verified for the project.

Your first IT/OT integration pilot: scope to acceptance

Start with one production line. Define data ownership, measurable acceptance criteria and failure scenarios before scaling an integration.

Start with one operational decision

A pilot does not need to connect the entire factory. Choose one decision: preparing a shift report, validating a production order or relating energy use to a product. Record who handles that process today, how often it happens and which information they use. Measure a baseline before claiming an improvement. Report preparation time, missing records and manual corrections are different measures and should be tracked separately. Assign an owner who can confirm whether the resulting information is actually useful.

Agree on a data contract

Automation engineers own source tags and quality codes; production teams define shifts, products and downtime meanings; IT owns the destination schema, access and retention. Specify an equipment identifier, source timestamp, engineering unit and quality field for every record. Whether a temperature is in Celsius or Fahrenheit, or when a counter resets, may matter more than establishing a connection. Include those cases in the test dataset. Avoid relying on a tag name as the only explanation of a value.

Run a controlled first connection

Begin with read-only access wherever possible. Use a test database rather than a production ERP endpoint. Validate a small set of tags in OPC Router and inspect triggering, transformation and destination writes separately. Include network outages, slow destinations, duplicate messages, bad quality and service restarts in acceptance tests. Document the expected record count and recovery behaviour for each case before running it. That makes a failed test useful rather than a matter of interpretation.

Expand only after measuring

At the end of the pilot, compare source and destination counts, latency distributions, error logs and replay results. Screenshots alone do not establish data completeness. Agree on acceptable limits with the plant team; there is no universal latency target for every use case. Name the operational owner, rollback procedure and change window before moving to another line. Reusing the same template on different equipment also deserves an acceptance test because tag semantics and timing may differ.

Take a concrete brief to the meeting

Prepare one page with the target decision, source and destination systems, data owner, sample record, expected load, outage tolerance and acceptance criteria. Our integration planner creates an initial connection brief; the project readiness checklist highlights missing responsibilities. Together they help make licence discussions and commissioning plans specific enough to review.

Technical references

OPC Router – How it works

<https://www.opc-router.com/opc-router-details/>

Commissioning handover: from working flow to operable system

Make an integration maintainable with a handover package covering backups, monitoring, access and incident ownership.

Working is the first step

Moving data in production is only the beginning. Operations needs to know what each flow does, where to investigate failures and how to recover. Include source-destination inventories, trigger conditions, field mappings, permissions and dependencies in the handover package. Record product and plug-in versions. Do not place passwords or private keys in plain text in the document. Name the approved secret-management location and the role responsible for access instead.

Connect alerts to actions

A connected status does not prove that useful data is flowing. Monitor last successful operation, oldest queued record, error counts and destination freshness. For every alert, document the responsible team, severity and first diagnostic step. Sending an email is not sufficient if no one owns the response. Define how planned maintenance affects alerts and how suppression is removed afterwards. Test at least one notification path before the operational handover.

Actually restore a backup

Having a backup and being able to restore it are different outcomes. In a test environment, restore configuration, certificate dependencies and persistent queue data. Check current documentation for what the product backup includes. Measure recovery time against the agreed objective. Consider reconciliation and duplicate risks when returning to an earlier version. Keep backup copies and restore instructions accessible to the recovery owner without relying on the failed machine.

Request evidence at handover

Keep test records for normal operation, destination outage, service restart, permission denial and bad-quality data. Have the operational owner perform at least one scenario during handover. Give each open issue an owner and a completion criterion. Put certificate renewal, disk capacity review, restore exercises and version reviews on the maintenance schedule. This makes the integration supportable without depending on one person's memory and provides a baseline for checking future changes.

Technical references

OPC Router manual

<https://www.opc-router.com/opc-router-manual/>

03 / PROJECT WORKSHEET

Complete with your team.

Project / plant: _____

Date / owner: _____

Decision / check	Notes, owner and verification
Business objective / pilot scope	
Source / destination / data owner	
Sample record / unit / timestamp	
Expected data rate / outage	
Acceptance criterion and evidence	
Operations owner / rollback	

Next step

Share your open questions and source-destination systems with info@opcturkey.com. Interactive tools:
opcrouter.com.tr/en/tools