

MatrikonOPC

Licensing Procedures

MatrikonOPC

Licensing Procedures

This manual is a product of Matrikon Inc.

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Document Revision History:

Date	Document Version	Description	Author
2004-08-10	1.0	Initial document.	JH
2006-11-15	1.1	Revisions.	TNM
2007-01-08	2.0	Applied new template. Incorporated applicable general licensing information from User's Manual.	LB

SOFTWARE VERSION

Version: N/A

DOCUMENT VERSION

Version: 2.0

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Introduction

This document is intended to assist you in licensing MatrikonOPC™ products.

Please feel free to contact the MatrikonOPC Support group any time you require assistance. Refer to **Contacting MatrikonOPC** in this document for contact information.


Who Should Use This Manual

This document is intended for all users responsible for licensing MatrikonOPC products, and explains how to perform a range of licensing tasks:

- Temporary or permanent licensing of software
- De-licensing (for license removal or transfer) software
- Generating licensing files

Overview of Manual

This document uses icons to highlight valuable information. Remember these icons and what they mean, as they will assist you throughout the manual.

	<p>This symbol denotes important information that must be acknowledged. Failure to do so may result in the software not functioning properly.</p>
<p>BOLD</p>	<p>Font displayed in this color and style indicates a hyperlink to the applicable/associated information within this manual, or if applicable, any external sources.</p>

The *Licensing Procedures* document has been designed as such so that you can click on references in the document to jump to that referenced point without having to scroll through several pages (in some cases). For example, if you were to see the sentence “Refer to Figure 1 for more information”, pressing the **CTRL** key and clicking your mouse on the text “Figure 1” will automatically take you to the location of Figure 1 within the document.

This document consists of several sections and is structured as follows:

- **Introduction** – this introductory chapter.
- **Licensing** – hardware and software key licensing information.
- **Software Authorization Licensing Program** – information about the MatrikonOPC Licensing Utility that is used to license and de-license driver software, create authorization requests, and enable temporary authorization.
- **Demo Licenses** – information on how to acquire demo licenses for MatrikonOPC products.
- **Permanent Licenses** – the steps needed to permanently license a MatrikonOPC product on your machine.
- **Generating a New AuthorizeRequest.MTK File** – the steps needed to generate a new *AuthorizeRequest.MTK* file.
- **De-Licensing Software** – how to successfully remove a license from your computer.
- **Licensing FAQs** – common questions regarding licensing.

- **Contacting MatrikonOPC** – contact phone and fax numbers, and e-mail addresses, for MatrikonOPC’s Licensing and Support teams.

References

Licensing information is also provided online in MatrikonOPC’s Knowledge Base:

Hardware Licensing

http://www.matrikonopc.com/support/Licensing/Hardware_Licensing/kb-product.aspx

Software Licensing

http://www.matrikonopc.com/support/Licensing/Software_Licensing/kb-product.aspx

Terminology

Table 1 provides a list of definitions for terms used throughout this document.

The terms *screen* and *window* are used interchangeably.

Term/Abbreviation	Description
Matrikon	Matrikon Inc.
OPC	A communication standard. Refer to www.opcfoundation.org for more information.
MatrikonOPC	Matrikon’s brand name for its OPC-compliant servers and clients.
Demo	As in demo licenses; a temporary or demonstration version.

Table 1 - Terms and Definitions

Licensing

Most MatrikonOPC products require that some form of license criteria be met. Some products are hardware-licensed only, some are software-licensed only, and some are both. For more information on MatrikonOPC products that are hardware-licensed only, please contact your Account Manager.

Note that no data will be lost in the event of license failure, only the ability to retrieve data will be affected.

Hardware Keys

For software that supports hardware key licensing, a USB or HASP hardware key coded to that particular program can be purchased. This key must be securely fastened to the parallel (or USB) port of the computer on which the software is installed.

MatrikonOPC parallel port keys cannot be combined in a series (i.e., "daisy-chained"). All licenses must exist on one physical key. However, it does not interfere with hardware keys from other vendors, nor does it affect other normal parallel port applications, such as printing.

If the software uses hardware licensing, the installation program will install a device driver for USB or HASP keys on the target system. It will function for a demonstration period of two hours before "timing out". At this point, all device communication will cease.

Software Keys

For products that support feature-specific and computer-specific licensing, a license is issued that is specific to a given set of features in the application, and to the computer on which it is installed. The license will not work on another computer, and will support only those features that have been purchased. Products that are software-licensed only, will stop working once the license expires.

Software Authorization Licensing Program

MatrikonOPC provides a Software Authorization Licensing program (i.e., MatrikonOPC Licensing Utility) that is used to license and de-license their driver software, create authorization requests, and enable temporary authorization.

Refer to Table 1 below to view the authorization options available in the Licensing Utility.

Authorization Option	Description
<i>Create authorization request for</i>	Creates a software license request file to be submitted to MatrikonOPC. Normally, you do not need to select this option because a request file is automatically generated during product installation. Refer to Generating a New AuthorizeRequest.MTK File for more information.
<i>License software using the Authorize file below</i>	Reads the specified authorization key file which contains a license key provided by MatrikonOPC. If the authorization file is valid, the product is licensed for use. Refer to Step 3: Install Your Permanent License for more information.
<i>De-license software using the Remove file below</i>	Removes the licensing for a previously-licensed product. Use this option if you want to transfer the license to a different computer, or return the software after an evaluation period. Refer to De-Licensing Software for more information.
<i>Enable temporary license using the AuthorizeRequest file below</i>	Allows the product to run in fully functional mode for a specific number of days from the installation date (typically, 30 days). Use this option if you did not enable temporary licensing during installation. Refer to Enabling Temporary Software Authorization for more information. Note: A demo (i.e., temporary) license can be enabled only once.

Table 2 - Software Authorization Licensing Options

Software License Requests

Software licensing is specific to a particular computer. A license key cannot be created and issued until the software is actually installed on the machine where it is to be used.

To accommodate this, an **Authorization Request** file (*AuthorizeRequest.MTK*) is created and contains all of the information needed for MatrikonOPC to issue a software license. You can send this file to MatrikonOPC's Licensing team via e-mail or FTP. Alternatively, you can call MatrikonOPC's Support team and provide them with the information contained in the *AuthorizeRequest.MTK* file. For Support contact information, refer to the **Contacting MatrikonOPC** section in this document.

If you have purchased the software and sent in the authorization request file, you will be issued a software license key file. Typically, the key file is sent via e-mail (for more information, refer to **Automatic Licensing**). However, there are some alternative methods of receiving the software key (which are outlined during the installation process).

When the key is sent to you using a file-based method (e.g., e-mail, FTP, floppy disk), the key is contained in a file called *Authorize.MTK*. If you receive the key information by some other method,

you must enter information into a file that is created, based on instructions from the Support group. A text editor such as Notepad can be used to create the file.

Once you have received or created the file, it is recommended that you make a backup copy before doing anything else, and store the original file in the directory folder where the software was installed. You should use the backup copy to re-authorize the software should it need to be re-installed on the same computer at a later date.

Demo Licenses

This section contains information related to acquiring demo licenses for MatrikonOPC products.

The only limitation most MatrikonOPC software has in demo mode is in the time limit. The software is fully functional until 30 days have passed, at which point a grace period of two hours will begin. Once the two-hour grace period has passed, the license will expire. In cases where hardware licensing is available, stopping and starting the software after the software licensing demo period has expired will re-enable the two-hour demo period.


Enabling Temporary Software Authorization

In addition to creating the authorization request file, the installation program also provides you with the option of creating a temporary software license key. This allows you to use the software before receiving a permanent software license key or, if you are evaluating the software, to try it before purchasing it.

The temporary key allows the product to run in full functional mode for a specific amount of time from the installation date (typically, 30 days). If you do not select this option during installation, you can perform temporary authorization later.

To enable temporary software authorization:

1. From the **Start** menu, select **Programs -> MatrikonOPC -> [OPC Product Name] -> MatrikonOPC Licensing Utility**.
2. The **MTK Software Authorization** window appears.
3. Select the **Enable temporary license using the AuthorizeRequest file below** option button.
4. Ensure the **Authorization file path** field correctly points to the required *AuthorizeRequest.MTK* file, which is usually located in the install path.

Note: If you are unsure of the *AuthorizeRequest.MTK* file location, click on the  button to browse to the directory where your file is located.

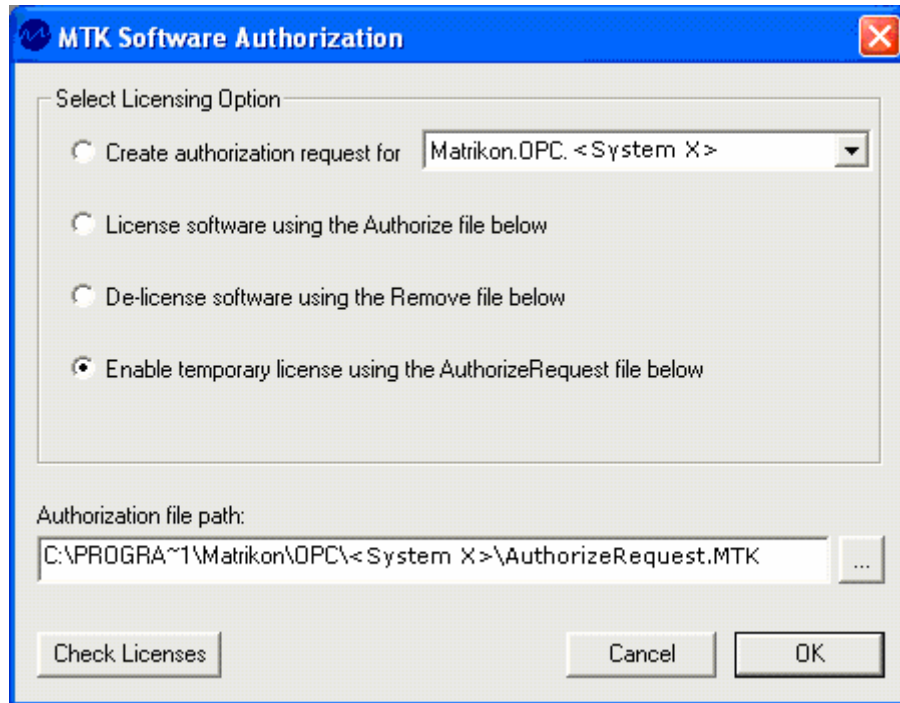


Figure 1 - MTK Software Authorization Window

5. Select the **OK** button to begin the demo.
6. The application processes the key file and a confirmation message verifies that the software has been successfully licensed. If an error occurs, make careful note of the error information and contact the Support team.

Demo License Expiration

Once your demo has expired, you may experience one or more of the following:

- The product's log file will state "*Software License Expired*".
- When you start your computer, a pop-window will appear stating a software license has expired.
- Software may operate normally for approximately two hours and then time out.
- Software launches but does not function at all.
- When you attempt to launch the software, a message is displayed stating the license has expired.
- Attempting to launch the software from an OPC Client will not work and a COM error is displayed.
- Dev-links in your server configuration become disabled.
- Upon selecting the **Check Licenses** button on the **MatrikonOPC Licensing Utility** window (lower left hand corner), the license is listed with a status of *Expired*.

Demo License Extension

If your demo period has expired and you wish to extend it, please contact your Account Manager to obtain a license.

Permanent Licenses

This section guides you through the steps needed to permanently license a MatrikonOPC product on your machine. License files are to be set to licensing@matrikonopc.com. To permanently license a product successfully you must:

1. **Install the software**
2. **Send the license file to MatrikonOPC Licensing**
3. **Install your permanent license**

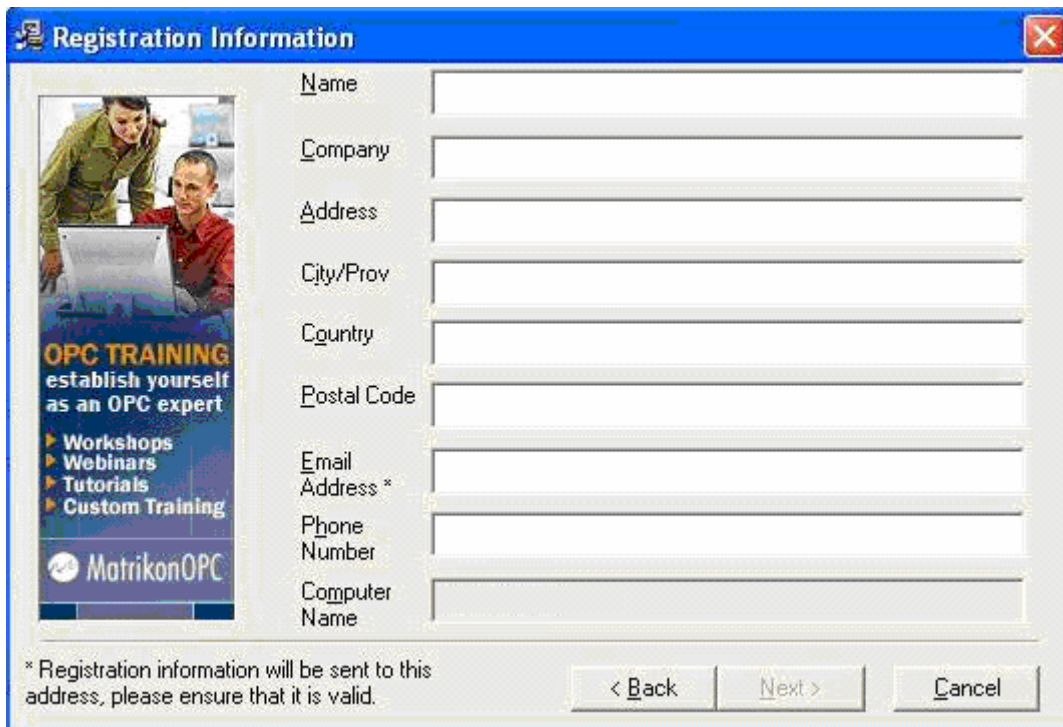
Step 1: Install the Software

The software must be installed on your machine before it can be licensed. If you have already installed the software, please proceed to **Step 2: Send Your License File to MatrikonOPC** in this document.

For software installation information, refer to the *User's Manual* for the specific product you want to install and license.

E-Mail Validity

During the software installation, you will be prompted to enter registration information in a screen similar to that shown in Figure 2.



The image shows a Windows-style dialog box titled "Registration Information". On the left side, there is a vertical banner with a photograph of two people looking at a computer screen. Below the photo, the text reads "OPC TRAINING establish yourself as an OPC expert" and lists "Workshops", "Webinars", "Tutorials", and "Custom Training". The MatrikonOPC logo is at the bottom of the banner. To the right of the banner are several text input fields with labels: "Name", "Company", "Address", "City/Prov", "Country", "Postal Code", "Email Address *", "Phone Number", and "Computer Name". At the bottom of the dialog, there is a note: "* Registration information will be sent to this address, please ensure that it is valid." and three buttons: "< Back", "Next >", and "Cancel".

Figure 2 - Registration Information Screen



It is important that you enter a valid e-mail address. This e-mail address determines the address to which the permanent license will be sent.

Transaction Number

During the installation process, please enter your transaction number when prompted (see Figure 3). A transaction number is printed on your CD and on the CD case.

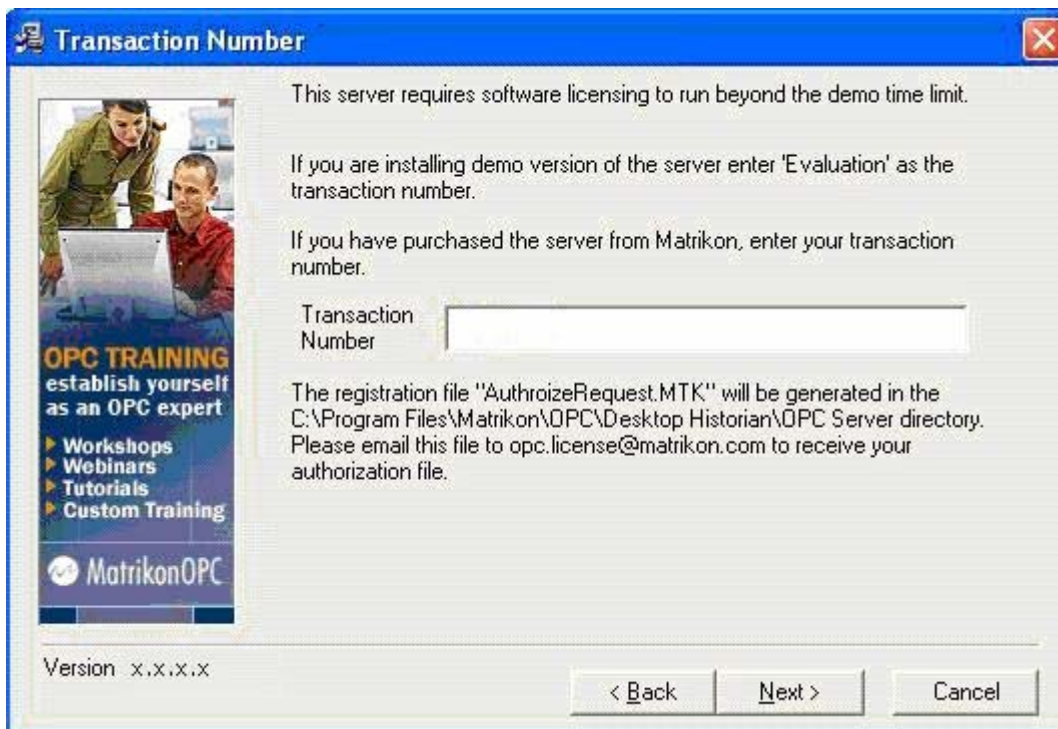


Figure 3 - Transaction Number Screen

If you did not enter a transaction number during installation, please refer to the following **AuthorizeRequest.MTK File** information.

Please place the transaction number in the subject and body of the e-mail that you send to licensing@matrikonopc.com.

Step 2: Send Your License File to MatrikonOPC

To obtain your new permanent license, we require the *AuthorizeRequest.MTK* file that is located in the installation directory of your MatrikonOPC product.

Upon installation, an *AuthorizeRequest.MTK* file is automatically generated and placed in the installation directory of your MatrikonOPC product.

The *.MTK* file contains the registration information that you had entered during the installation process. This file is in Rich Text Format (RTF) and can be edited. Please enter your transaction number in this file so it can be processed by MatrikonOPC's Automated Licensing Program.



You can edit anything in the *.MTK* file **except** the *RegKey* (Registry Key), *ClientNode* (Computer Name), and *ProgID* (Program ID). **Changing any of these values will invalidate your license.**

If there is no *AuthorizeRequest.MTK* file automatically placed in the install path, refer to **Generating a New AuthorizeRequest.MTK File** in this document for assistance.

To request/receive a permanent license:

1. Navigate to the directory where your MatrikonOPC product is installed. By default, this directory is located in: *C:\Program Files\Matrikon\OPC\[OPC Product Name]*.
2. Within the directory located in step 1, make sure it contains a file named *AuthorizeRequest.MTK*.

Note: If an *AuthorizeRequest.MTK* file does not exist in the directory, please refer to **Generating a New AuthorizeRequest.MTK File**.

3. Create an e-mail and attach the required *AuthorizeRequest.MTK* file.
4. In the same e-mail, provide your transaction number.

Note: If you do not know the transaction number, or if you have not purchased the software, contact your Account Manager.

5. Send the e-mail to **licensing@matrikonopc.com**.
6. Assuming complete information has been provided, your license should be processed in a timely fashion. If any complications are encountered, you will receive an e-mail from the Licensing team containing further instructions. Refer to the following **Automated Licensing** section for more information.

Automated Licensing

Once the Licensing team receives your e-mailed license request, MatrikonOPC's Automated Licensing Program will issue either:

1. The license you asked for.
- Or,
2. An e-mail stating there has been an error in issuing the requested license and the possible reasons for the error.

The inability to issue a license could be due to any of the following reasons. Should any of these situations apply, resolve the problem and then re-submit the license request:

- **AuthorizeRequest.MTK file is not attached** – ensure that the *AuthorizeRequest.MTK* file from the installation directory is attached to the e-mail request.
- **Transaction Number is not correctly entered in the AuthorizeRequest.MTK file** – ensure the correct transaction number is entered properly in the *AuthorizeRequest.MTK* file.
- **File sent does not end with an .MTK extension** – the Automated Licensing Program recognizes only *.MTK* files. Zip files cannot be used. Each license request file must be attached separately.

Other possible reasons for the error are:

- You have requested an evaluation (i.e., demo) license rather than a permanent one.
- According to the MatrikonOPC Licensing database, your allocated number of licenses for this particular software has been met.
- According to the MatrikonOPC Licensing database, you have requested a license for software that you have not yet purchased.

The Licensing team will manually process any failed license request on the next business day.

Step 3: Install Your Permanent License

To install your permanent license:

1. Once the Licensing team has received your e-mail with the *AuthorizeRequest.MTK* file, the license is processed and you are sent an *Authorize.MTK* file via e-mail.
2. Save the *Authorize.MTK* file to a location on your hard drive. It is recommended that you save the file to the installation directory of your MatrikonOPC product.
3. From the **Start** menu, select **Programs** -> **MatrikonOPC** -> **[OPC Product Name]** -> **MatrikonOPC Licensing Utility**.
4. The **MTK Software Authorization** screen appears.
5. Select the **License software using the Authorize file below** option button.

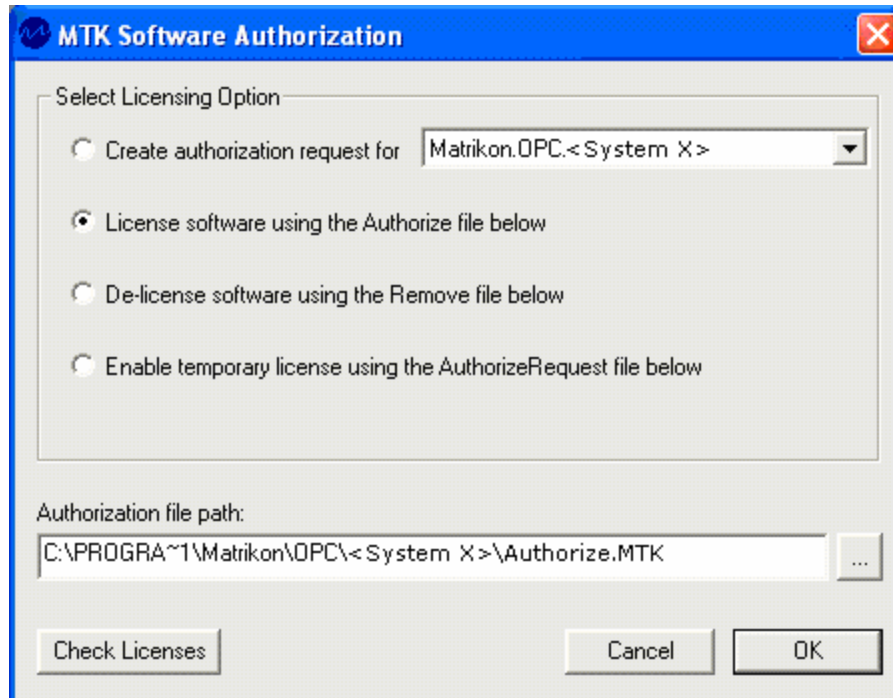



Figure 4 - MTK Software Authorization - License Option

6. Make sure the **Authorization file path** field contains the correct location of the newly acquired *Authorize.MTK* file.

Note: If you are unsure of the file location, click on the  button to browse to where your *Authorize.MTK* file is located.

7. Click on the **OK** button. Your MatrikonOPC product is now licensed.

Generating a New AuthorizeRequest.MTK File

This section explains the steps to follow, if necessary, to generate a new *AuthorizeRequest.MTK* file.

To generate a new *AuthorizeRequest.MTK* file:

1. From the **Start** menu, select **Programs -> MatrikonOPC -> [OPC Product Name] -> MatrikonOPC Licensing Utility**.
2. The **MTK Software Authorization** window appears.
3. Select the **Create authorization request for** option button.
4. From the drop-down list adjacent to the **Create authorization request for** option, select the required product (in Figure 5, MatrikonOPC GDA has been selected).

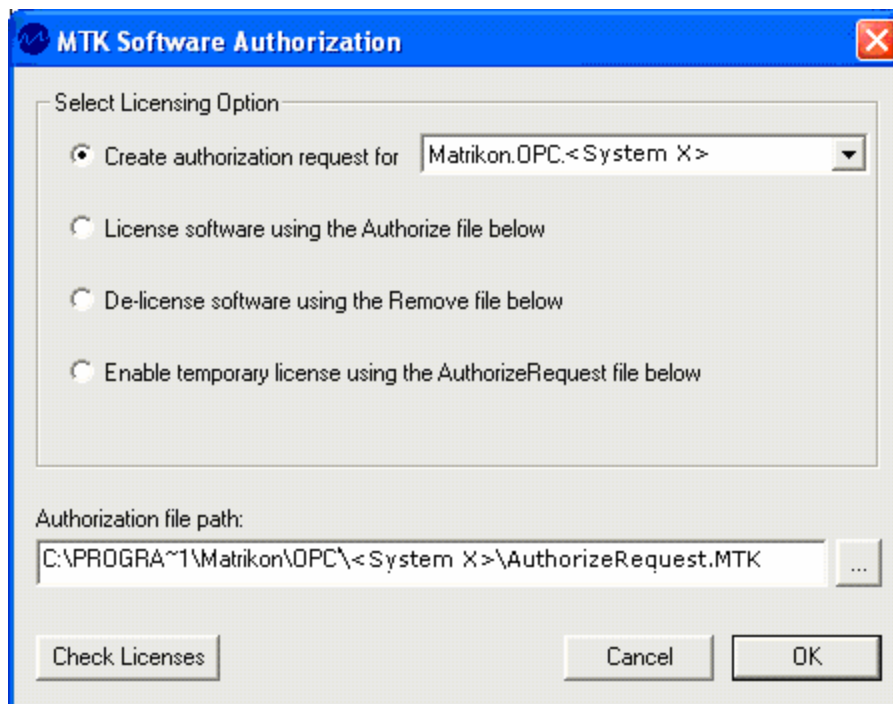



Figure 5 - MTK Software Authorization - Create Authorization Request Option

5. Make sure the **Authorization file path** field contains the correct location of the *AuthorizeRequest.MTK* file.

Note: If you are unsure of the file location, click on the  button to browse to where your *AuthorizeRequest.MTK* file is located.

6. Click on the **OK** button.
7. The **MTK Software Authorization** window appears where you are to enter the necessary registration information.

Note: The e-mail address provided in this screen is where your license file will be sent.

8. Click on the **OK** button.
9. An *AuthorizeRequest.MTK* file will automatically appear in the installation directory for your MatrikonOPC product.

De-Licensing Software

This section will instruct you on how to successfully transfer or remove a license from your computer. Completing this task demonstrates to MatrikonOPC that you have removed the software and the license, and allows MatrikonOPC to process a new license for you on a new machine.

In a situation where some hardware in your computer has been changed, you will need to de-license your machine and then license it again as software licensing references the hardware on the key lookup.

If you want to install the software on a different computer, or return the software, you must first de-license the currently installed version.

If you are transferring the software to another computer, you can install it there first and send the new authorization request file along with the de-license validation file at the same time. MatrikonOPC will then issue you a license authorization file for the new installation.


Before you receive a new license, a temporary authorization feature can be used (for more information refer to **Enabling Temporary Software Authorization**) to enable the software immediately on the new installation.



- **Please follow the steps provided in this section if you plan to format your computer, upgrade hardware, or change the computer name.** This allows us to ensure that our database accurately reflects the number of licenses you have processed.
- If the number of licenses requested exceeds the amount purchased, we are unable to issue you a new license.

To remove a license:

1. Upon successful placement of a permanent license on your computer, a *RemoveRequest.MTK* file is automatically generated and placed in your MatrikonOPC product's installation directory.
2. Attach the *RemoveRequest.MTK* file to an e-mail and send it to licensing@matrikonopc.com.
3. Licensing will process the file and send you a *Remove.MTK* file via e-mail.
4. From the **Start** menu, select **Programs -> MatrikonOPC -> [OPC Product Name] -> MatrikonOPC Licensing Utility**.
5. The **MTK Software Authorization** window appears.
6. Select the **De-license software using the Remove file below** option button.
7. Make sure the **Authorization file path** field contains the correct location of the *Remove.MTK* file.

Note: If you are unsure of the file location, click on the  button to browse to where your *Remove.MTK* file is located.

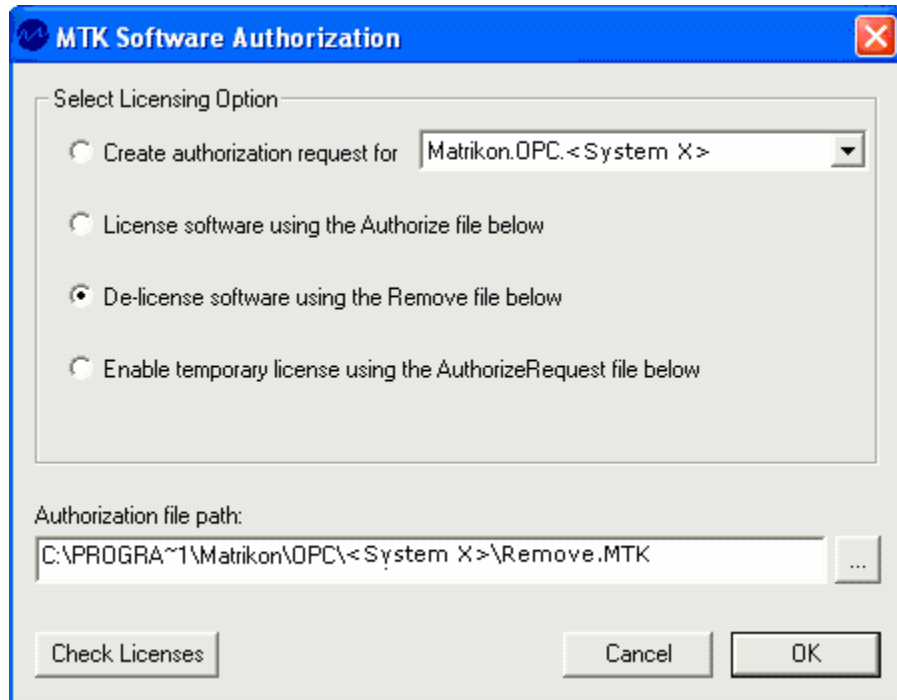


Figure 6 - MTK Software Authorization - De-license Option

8. Click on the **OK** button.
9. A *RemoveValidate.MTK* file is automatically generated and placed in the installation directory for your MatrikonOPC product.
10. Attach the *RemoveValidate.MTK* file to an e-mail and send it to licensing@matrikonopc.com so that your license return can be validated.
11. The license has now been successfully removed from your machine.
Note: If required, you can now install the software on a new machine and request a permanent license.

Licensing FAQs

Demo License

Question: Can I re-install my MatrikonOPC product to obtain another 30 days?

Answer: No. Re-installing the product will not allow another 30-day evaluation license. Contact MatrikonOPC Support or your Account Manager for more information.

Question: My license has expired. Who should I talk to about getting a new one?

Answer: Contact your Account Manager.

Question: How can I view the status of my MatrikonOPC license?

Answer: Refer to the **Demo License Expiration** section in this document for a list of possible indications that the software license has expired.

To check the status of a MatrikonOPC software license:

1. From the **Start** menu, select **Programs -> MatrikonOPC -> [OPC Product Name] -> MatrikonOPC Licensing Utility**.
2. The **MTK Software Authorization** window appears.

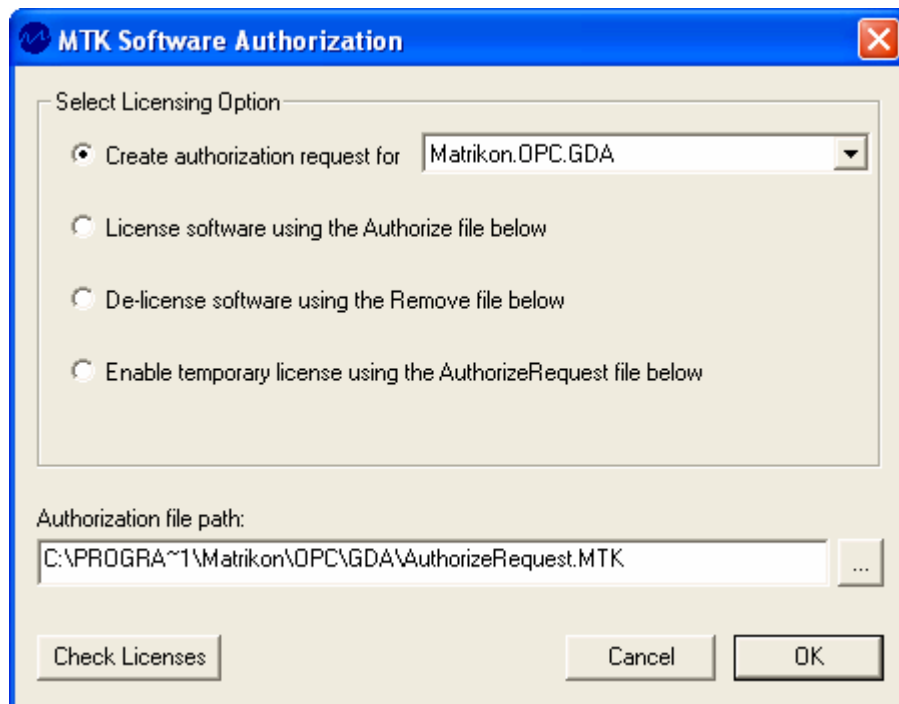


Figure 7 - MTK Software Authorization - Check Licenses

3. Click on the **Check Licenses** button located in the bottom left corner of the screen.

4. The **License Information** window appears and lists the ProgIDs for all products installed on your machine, and their corresponding license status.

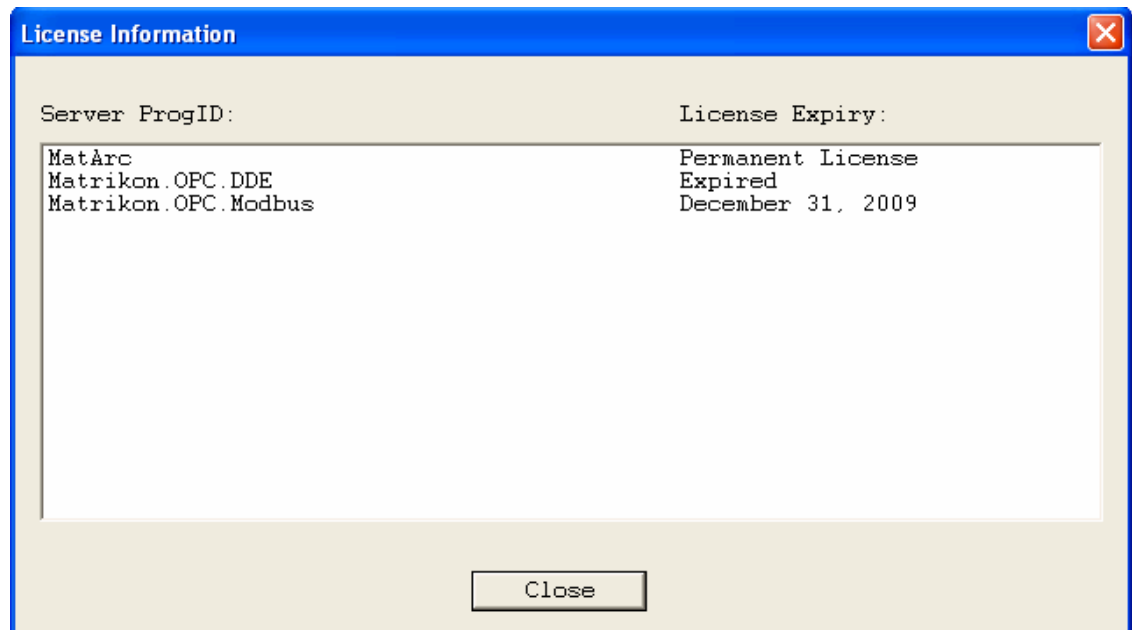


Figure 8 - License Information Window

5. Click on the **Close** button to close the **License Information** window and return to the **MTK Software Authorization** window.

Permanent License

Question: I am trying to install my *Authorize.MTK* file as a permanent license, but for some reason, it won't complete. Why?

Answer: There are several possible reasons for this:

1. You have formatted your computer.
2. You have changed some hardware in your computer. Software licensing references the hardware on the key lookup.
3. You changed some information in the *AuthorizeRequest.MTK* file before sending it to us. For example, the file may contain a modified *ProgID*, *ClientNode*, or *RegKey* (for more information, refer to **AuthorizeRequest.MTK** in this document).
4. Your software is already licensed. The MatrikonOPC Licensing Utility cannot overwrite the existing license and will display an error.
5. The *Authorize.MTK* file is older than 30 days from the date it was issued to you. MatrikonOPC license files are dated to expire one month from the issued date. If they are installed within 30 days, your license will be permanent, but will fail to install after that date.



Use the **Check Licenses** button on the **MTK Software Authorization** window (bottom left corner) to check the status of your license or licenses.

Hardware License

Question: Can I install multiple keys on the same parallel port?

Answer: No. Each hardware key needs to be on its own port. You cannot “daisy-chain” them together. If you do, only the first key (i.e., the one attached directly to the computer) will be recognized. Refer to **Hardware Keys** in this document for more information.

Automated Licensing Program

Question: I received an e-mail notification stating that my license couldn't be processed. Why? Is there anything I can do?

Answer: For detailed information, refer to the **Automatic Licensing** section in this document.

If you receive an e-mail notification stating that there was a problem issuing the license you requested, it could be because of any of the following situations. Resolve the problem and then re-submit your license request.

- The *AuthorizeRequest.MTK* file is not attached.
- Transaction number is not correctly entered in the *AuthorizeRequest.MTK* file.
- File sent did not end with an *.MTK* extension.

The error may also occur because:

- You are requesting a demo license.
- Your allocated number of licenses for this software has been met.
- You are requesting a license for software you have not yet purchased.

Search the MatrikonOPC Support Knowledge Base at www.opcsupport.com to find the answers to other commonly-asked Licensing questions.

Contacting MatrikonOPC

This section provides MatrikonOPC contact information. If you have any questions or concerns, please feel free to contact us. Our support hours are 8:00 a.m. to 6:00 p.m. Mountain Standard Time.

Phone Numbers:

Matrikon Direct: 780.448.1010
MatrikonOPC Support: 780.448.1010 Extension 4011
Support Direct: 780.945.4011
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