



# Introduction to EPICS

from a user point of view

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DAC/LNLS/CNPEM









```
(sirius) ~$ caget SI-Fam:PS-Q1:Current-Mon
SI-Fam:PS-Q1:Current-Mon 91.33
```





(sirius) ~\$ caget SI-Fam:PS-Q1:Current-Mon SI-Fam:PS-Q1:Current-Mon 91.33





CA stands for Channel Access, the name of the communication protocol underlying all EPICS 3 connections

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Connects to a CA server (input-output controller, or IOC) and gets the current value of one record

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Name of the property we want to connect. **Represents some process variable (PV) of a given device**. These **names** are defined by a **string** (a-z A-Z 0-9 \_ - : [ ] <> ;) and **must be unique** across the entire EPICS network. At SIRIUS, we use naming conventions to improve interpretability.

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connections requests are issued.

The client: environment where

Value of the process variable. In this case, the DCCT measurement of the electric current of a quadrupole power supply.





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  - Modular, distributed and scalable: no bottlenecks, very robust and decentralized;





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  - Lack of abstraction and atomic actions (at least with version 3);
- Tool based: minimizes need for customer-specific coding (independent development);
- Written in C++, with support for python and matlab, re-implemented in Java, etc.





Each PV has several additional properties:

```
(sirius) ~$ caget -d 34 SI-Fam:PS-Q1:Current-Mon
SI-Fam:PS-Q1:Current-Mon
   Native data type: DBF_DOUBLE
   Request type:
                     DBR_CTRL_DOUBLE
   Element count:
   Value:
                     91.33
   Status:
                     NO_ALARM
   Severity:
                     NO_ALARM
   Units:
   Precision:
   Lo disp limit:
   Hi disp limit:
                     120
   Lo alarm limit:
                     0
   Lo warn limit:
   Hi warn limit:
                     120
   Hi alarm limit:
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```





Each PV has several additional properties:

If > 1, PV is an array.  $\checkmark$ 

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```
(sirius) ~$ caget -d 20 SI-Fam:PS-Q1:Current-Mon
SI-Fam:PS-Q1:Current-Mon
Native data type: DBF_DOUBLE
Request type: DBR_TIME_DOUBLE
Element count: 1
Value: 91.3305
Timestamp: 2025-08-28 14:10:03.964393
Status: NO_ALARM
Severity: NO_ALARM
```





#### Each PV has several additional properties:

If > 1, PV is an array.

Possible alarms or warnings related to this PV: including disconnection with hardware or other reliability problems.

Physical interpretation of data

Limits that raise alarms

Date and time of the last update of this PV

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PVs also have read and write access control. For instance, we cannot write on a PV that only maps the readout of some property:

```
(sirius) ~$ caput SI-Fam:PS-Q1:Current-Mon 92
Old : SI-Fam:PS-Q1:Current-Mon 91.3298
Error from put operation: Write access denied
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91.3305

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Command to write on a PV

Desired setpoint value

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• On the server side, the IOC building blocks are records that are mapped into CA PVs by the server layer;



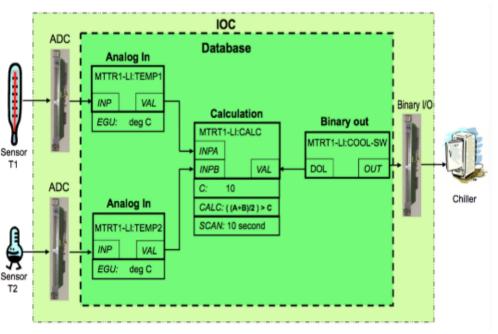


- On the server side, the IOC building blocks are records that are mapped into CA PVs by the server layer;
- There are several types of records, to perform different tasks:





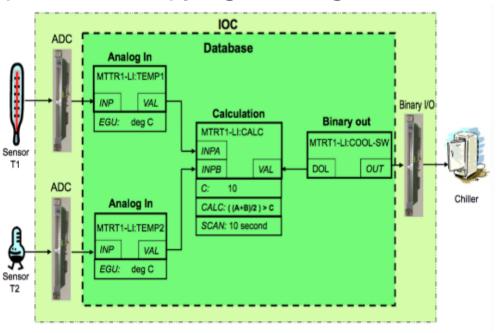
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  - Analog/Long/Binary/String Input: read data from hardware (they differ on the data type that can be handled);
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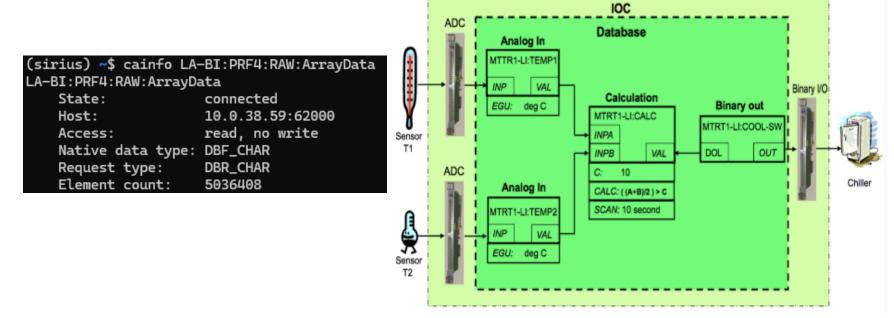
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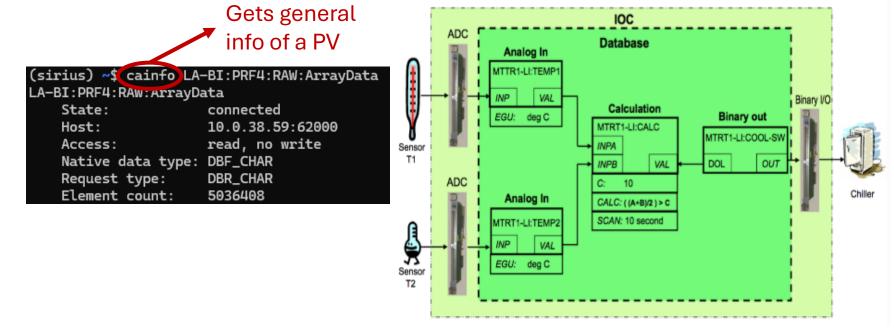
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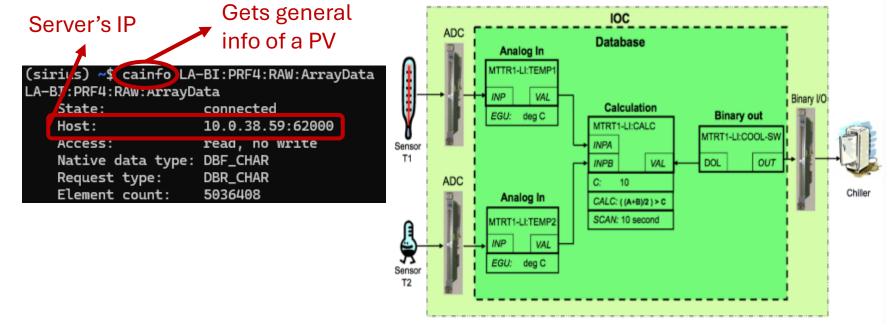
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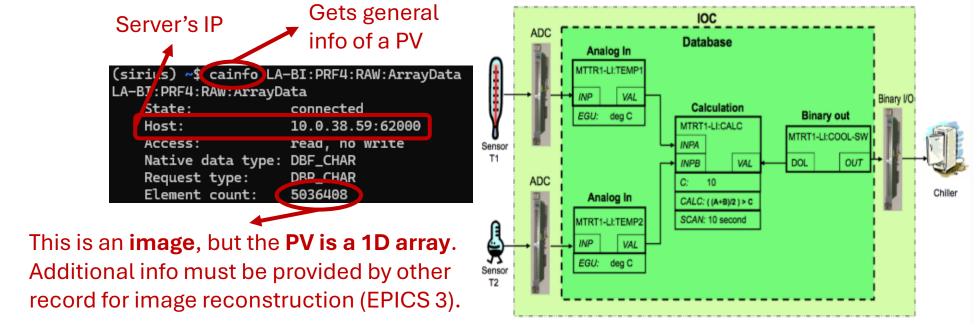
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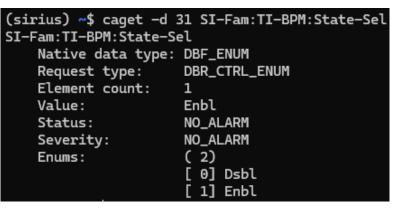


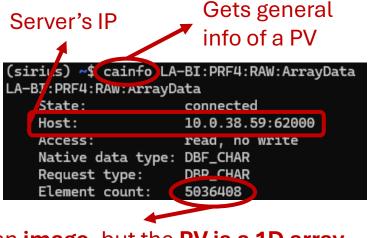




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  - Multi-Bit Binary Input/Output: trigger tasks based on up to 16 choices (ENUMS)

Combining them in an IOC allows complex logic with very little (conventional) programming





Analog In

MTR1-LI:TEMP1

INP

VAL

EGU: deg C

Analog In

MTRT1-LI:CALC

INPA

INPB

VAL

C: 10

CALC: ((A+B)/2) > C

SCAN: 10 second

MTRT1-LI:TEMP2

INP

VAL

EGU: deg C

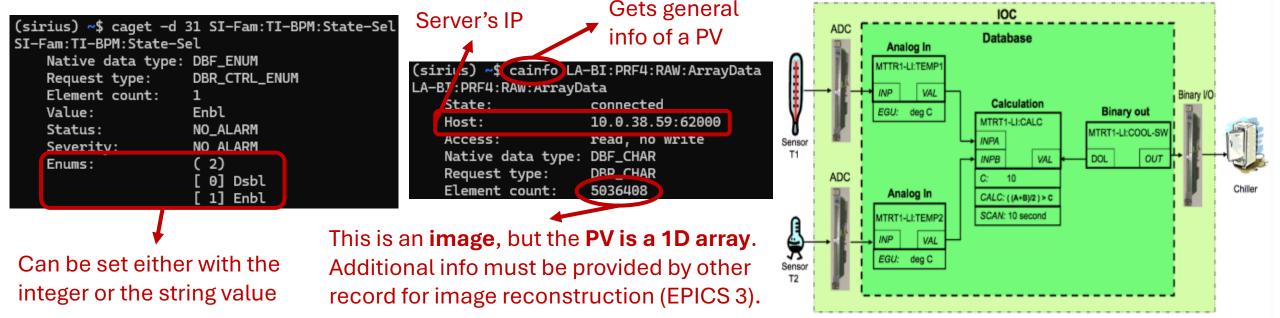
Chiller

This is an **image**, but the **PV is a 1D array**. Additional info must be provided by other record for image reconstruction (EPICS 3).





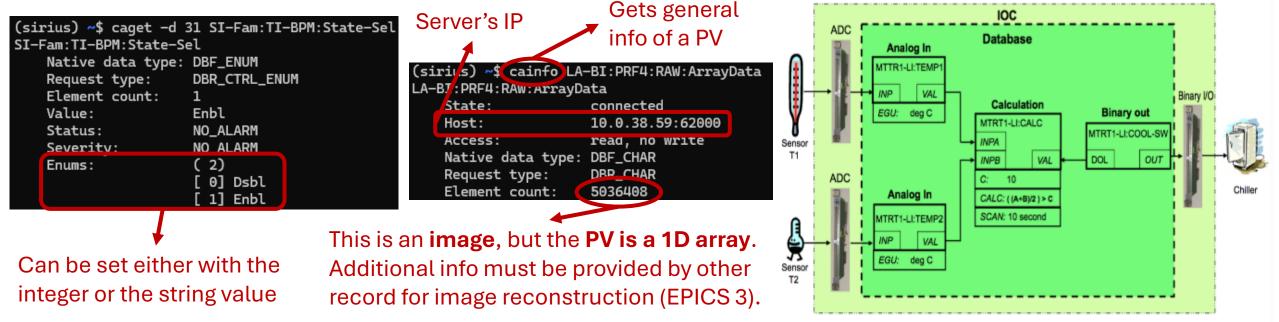
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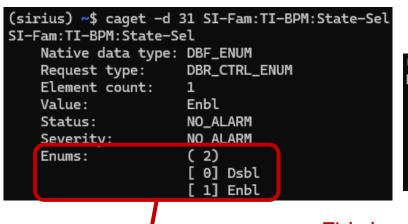
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  - Multi-Bit Binary Input/Output: trigger tasks based on up to 16 choices (ENUMS)
  - ...
- Each **record type** have a different **set of fields**, and different **data types** (char/int/long, float/double, string)
- Combining them in an IOC allows complex logic with very little (conventional) programming



Can be set either with the

integer or the string value

Server's IP

info of a PV

(sirius) ~\$ cainfo LA-BI:PRF4:RAW:ArrayData
LA-BJ:PRF4:RAW:ArrayData
State: connected
Host: 10.0.38.59:62000
Access: read, no write
Native data type: DBF\_CHAR
Request type: DBP\_CHAR
Element count: 5036408

This is an **image**, but the **PV is a 1D array**. Additional info must be provided by other record for image reconstruction (EPICS 3).

Analog In

MTR1-LI:TEMP1

INP

VAL

EGU: deg C

MTRT1-LI:CALC

INPB

VAL

C: 10

CALC: ((A+B)/2) > C

SCAN: 10 second

Chiller

Chiller

IOC









PVs	Records
Is the information unit the client receives via a CA (pvAccess) connection.	Are the IOC building blocks, elements of its database.
Has several properties. Different data types have a different set of properties.	Have a set of fields, which varies according to the record type.
Can be used to retrieve information or change state of the records, triggering different computations, or setting hardware.	Can be combined to perform complex logic. Can also be managed via a finite state machine controller (sequencer) to enhance their computational features.





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```
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP.VAL
SI-01M2:PS-FCH:Current-SP.VAL 0
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP
SI-01M2:PS-FCH:Current-SP 0
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP.DRVH
SI-01M2:PS-FCH:Current-SP.DRVH 0.95
```

```
record(ao,"SI-01M2:PS-FCH:Current-SP"){
    field(DESC,"set manual current control")
    field(EGU, "A")
    field(SCAN,"Passive")
    field(PINI,"YES")
    field(DRVH,"0.95")
    field(DRVL,"-0.95")
}
```





PVs	Records
Is the information unit the client receives via a CA (pvAccess) connection.	Are the IOC building blocks, elements of its database.
Has several properties. Different data types have a different set of properties.	Have a set of fields, which varies according to the record type.
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#### record name

```
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP.VAL
SI-01M2:PS-FCH:Current-SP.VAL 0
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP
SI-01M2:PS-FCH:Current-SP 0
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP.DRVH
SI-01M2:PS-FCH:Current-SP.DRVH 0.95
```

```
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#### field name

# (sirius) ~\$ caget SI-01M2:PS-FCH:Current-SP.VAL SI-01M2:PS-FCH:Current-SP.VAL 0 (sirius) ~\$ caget SI-01M2:PS-FCH:Current-SP SI-01M2:PS-FCH:Current-SP 0 (sirius) ~\$ caget SI-01M2:PS-FCH:Current-SP.DRVH

SI-01M2:PS-FCH:Current-SP.DRVH 0.95

record name

```
record(ao, "SI-01M2:PS-FCH:Current-SP"){
    field(DESC, "set manual current control")
    field(EGU, "A")
    field(SCAN, "Passive")
    field(PINI, "YES")
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```
record name

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    field(PINI,"YES")
    field(DRVH,"0.95")
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}
```





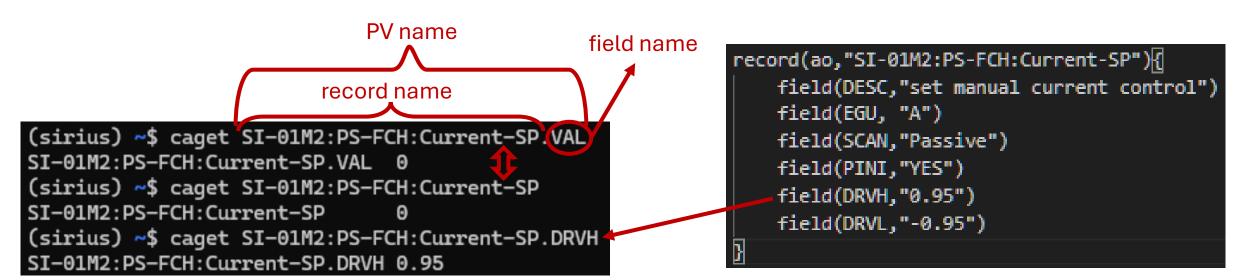
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```
PV name
                                                 field name
                                                              record(ao, "SI-01M2:PS-FCH:Current-SP"){
                                                                  field(DESC,"set manual current control")
                          record name
                                                                  field(EGU, "A")
(sirius) ~$ caget SI-01M2:PS-FCH:Current-SP.VAL
                                                                  field(SCAN, "Passive")
SI-01M2:PS-FCH:Current-SP.VAL 0
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SI-01M2:PS-FCH:Current-SP.DRVH 0.95
```





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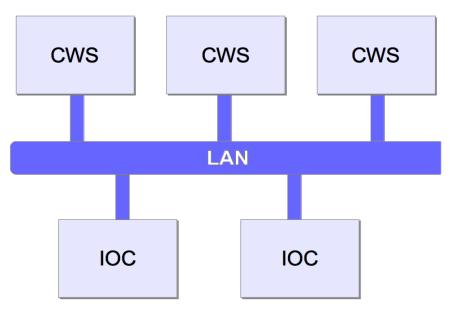
Each record field is a separate PV with its own properties and read/write access control. "VAL" is the default field.





**CWS:** Client workstation.

**IOC:** Input/Output Controller. PVs server.



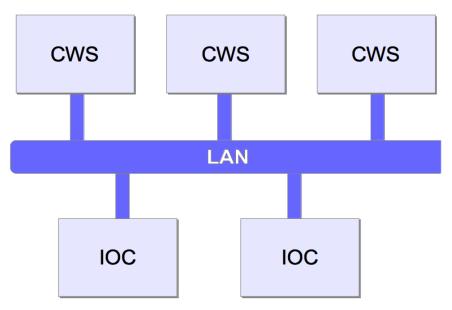




The connection process works this way:

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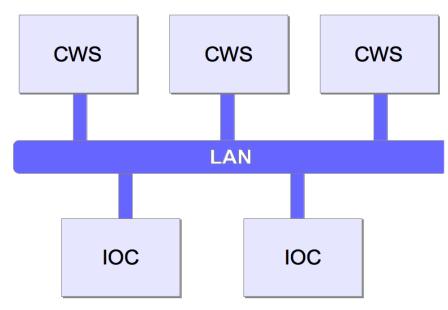


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• The client sends a broadcast in the network "asking which IOC serves a given PV name";

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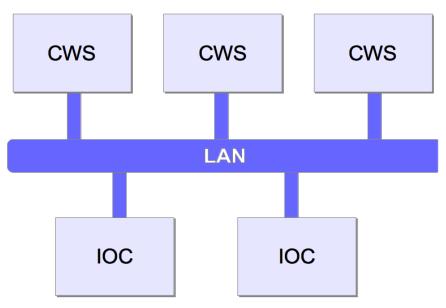


The connection process works this way:

- The client sends a broadcast in the network "asking which IOC serves a given PV name";
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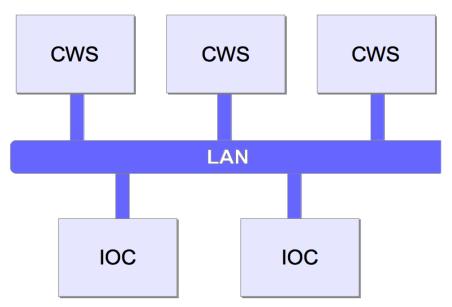


The connection process works this way:

- The client sends a broadcast in the network "asking which IOC serves a given PV name";
- The IOC that serves that PV responds to the client "I do."
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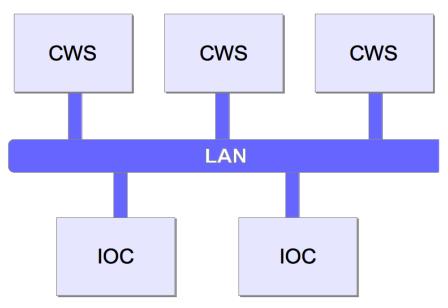


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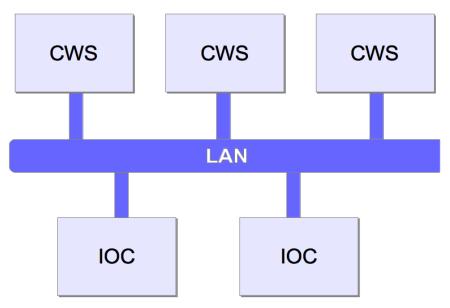
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After the connection is stablished, **get** and **put** requests can be issued. The client can also register that PV **to receive asynchronous updates** of new values or alarm states.

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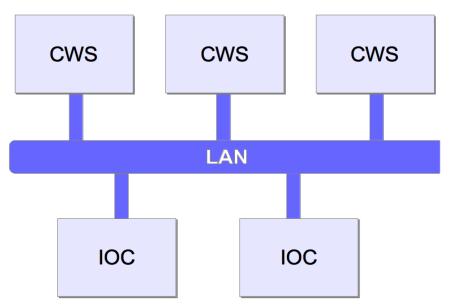
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```
(sirius) ~$ camonitor SI-01M2:PS-CH:Current-Mon

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:41.606582 2.09092

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:41.807166 2.08214

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:42.006755 2.0932

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:42.207250 2.08853

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:42.406955 2.08996
```





The connection process works this way:

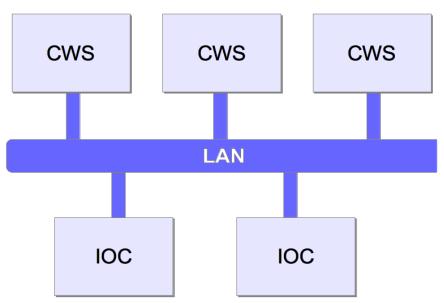
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**IOC:** Input/Output Controller. PVs server.

**LAN:** Communication network.



Creates a connection and register the PV for value updates

```
(sirius) ~$ (camonitor) SI-01M2:PS-CH:Current-Mon

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:41.606582 2.09092

SI-01M2:PS-CH:Current-Mon 2025-09-02 12:24:41.807166 2.08214

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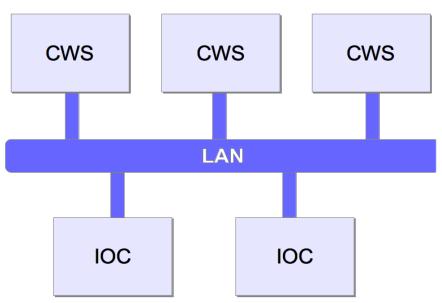
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#### **EPICS Clients: Archiver**





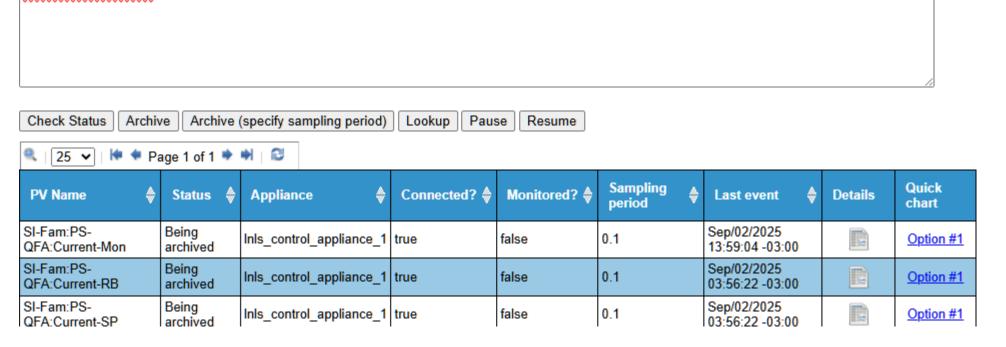
Allows storage of hundreds of thousands of PV with custom sampling rate and storage policies. The web management interface permits controlling archive parameters of each PV and provides general reports.

🔍   25 🗸   🖊 🏶 Page 1 of 1 🕨 🕨						
Instance Name	Status	•	PV Count	4	Event Rate	Data Rate (GB/day)
Inls_control_appliance_1	Working		168512		50,679.6	139.9

Here are the some detailed storage metrics of the appliance Inls\_control\_appliance\_1.

Name	Total space (GB)	Available space (GB)	Available space (%)
STS	251.81	243.32	96.63
MTS	59,596.32	30,153.17	50.6
LTS	59,596.32	30,153.17	50.6

To check the status of or to archive some PV's, please type in some PV names here.



SI-Fam:PS-QFA:Curr\*

#### **EPICS Clients: Archiver Web Server**





The web server has a REST API, so it is possible to control the archived PVs directly via *urls*. For instance, we can retrieve stored data:

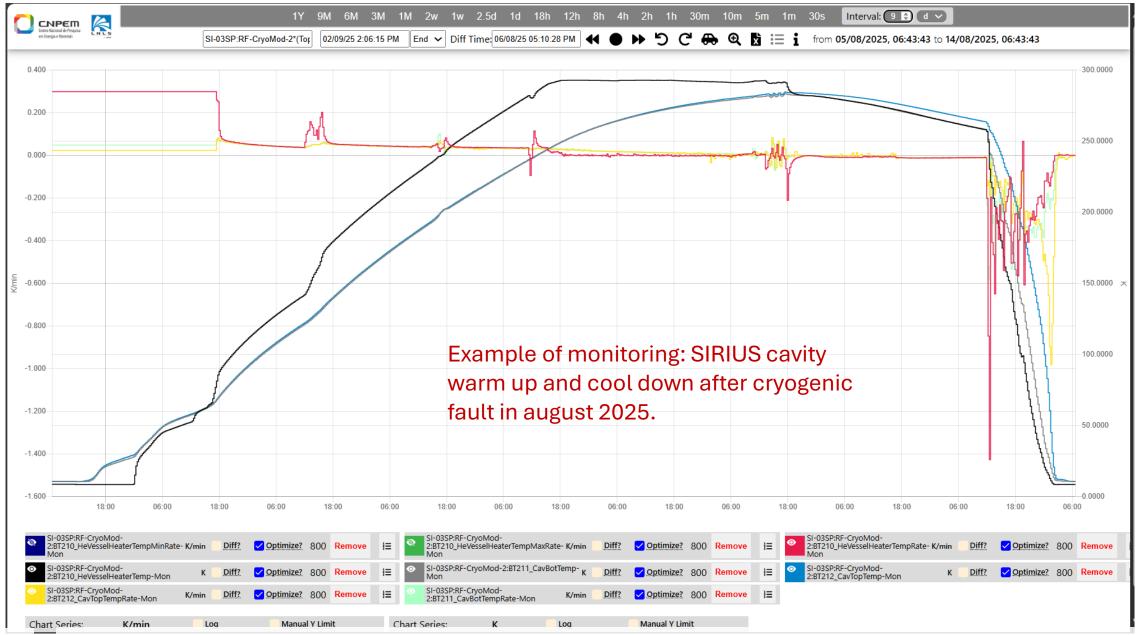
https://ais-eng-srv-ta.cnpem.br/retrieval/data/getData.json?pv=SI-01M1:PS-CH:Current-Mon&from=2025-08-10T00%3A00%3A00-03%3A00&to=2025-08-10T05%3A00%3A00-03%3A00

This type of API for *url* construction can easily be wrapped with some python code:

#### **EPICS Clients: Archiver Viewer**







# **EPICS Clients: PyEpics, caproto, Pvapy...**





```
In [40]: from epics import PV
In [41]: pv = PV('SI-01M2:PS-CH:Current-Mon')
In [42]: pv.connected
Out[42]: True
In [43]: pv.value
Out[43]: 2.079660415649414
In [44]:
         pv.pvname
         'SI-01M2:PS-CH:Current-Mon'
In [45]: pv.timestamp
Out[45]: 1756841365.165316
In [46]: pv.auto_monitor
Out[46]: True
In [47]: def print_value(pvname, value, timestamp, **kwargs):
             print(pvname, value)
In [48]: pv.add_callback(print_value)
Out[48]: 1
SI-01M2:PS-CH:Current-Mon 2.0806140899658203
SI-01M2:PS-CH:Current-Mon 2.0884361267089844
SI-01M2:PS-CH:Current-Mon 2.085383415222168
SI-01M2:PS-CH:Current-Mon 2.083285331726074
SI-01M2:PS-CH:Current-Mon 2.087386131286621
SI-01M2:PS-CH:Current-Mon 2.0803279876708984
SI-01M2:PS-CH:Current-Mon 2.0884361267089844
In [49]: pv.clear_callbacks()
```

PyEpics provides full control and monitoring of PVs properties, including the asynchronous update functionality.

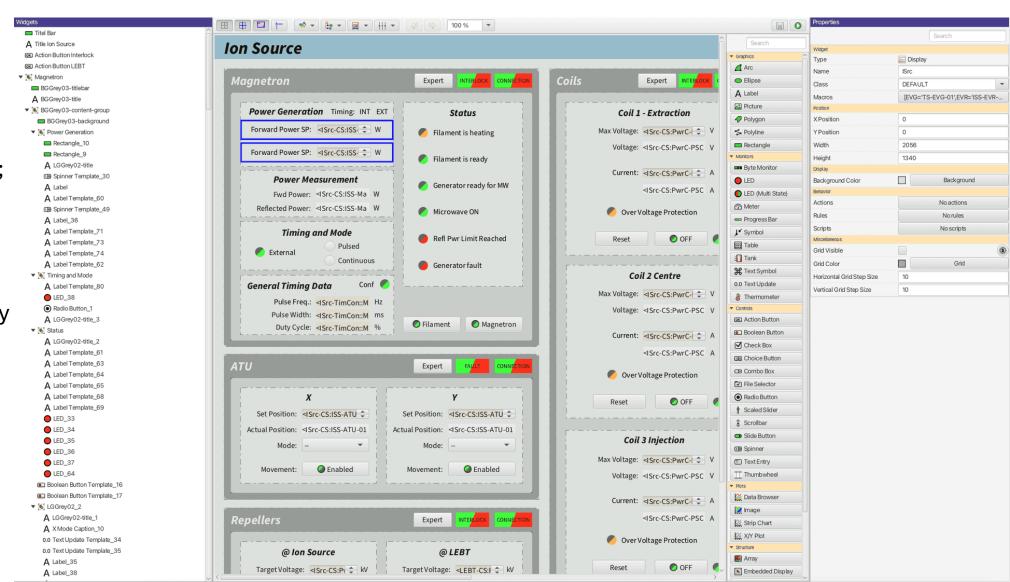
```
In [37]: atts = [f'{att:25s}' for att in dir(pv) if not att.startswith('_')]
In [38]: _ = [print(''.join(atts[i:i+3])) for i in range(0, len(atts), 3)]
                         access_callbacks
                                                  add_callback
access
auto_monitor
                         auto_monitor_mask
                                                   callbacks
char_severity
                         char_status
                                                   char_value
                                                   clear_callbacks
                         clear_auto_monitor
chid
                         connected
                                                   connection_callbacks
connect
connection_timeout
                         context
                                                   count
disconnect
                         enum_strs
                                                   force_connect
force_read_access_rights form
                                                   ftype
                         get_ctrlvars
                                                   get_timevars
get
get_with_metadata
                         host
                                                   info
lower_alarm_limit
                         lower_ctrl_limit
                                                   lower_disp_limit
lower_warning_limit
                         nanoseconds
                                                  nelm
poll
                         posixseconds
                                                   precision
put
                         put_complete
                                                   pvname
                                                   remove_callback
read_access
                         reconnect
run_callback
                         run_callbacks
                                                   severity
status
                         timestamp
                                                   type
typefull
                         units
                                                   upper_alarm_limit
                         upper_disp_limit
                                                   upper_warning_limit
upper_ctrl_limit
                                                   wait_for_connection
value
                         verbose
write_access
```





#### **CS-studio:**

- Largely used in the EPICS community;
- Implemented in Java;
- Extensive list of widgets;
- Heavy use of threading;
- Drag and drop display builder;
- Alarms table and integration with Logbooks and Archiver;
- Save and Restore feature.







#### PyDM:

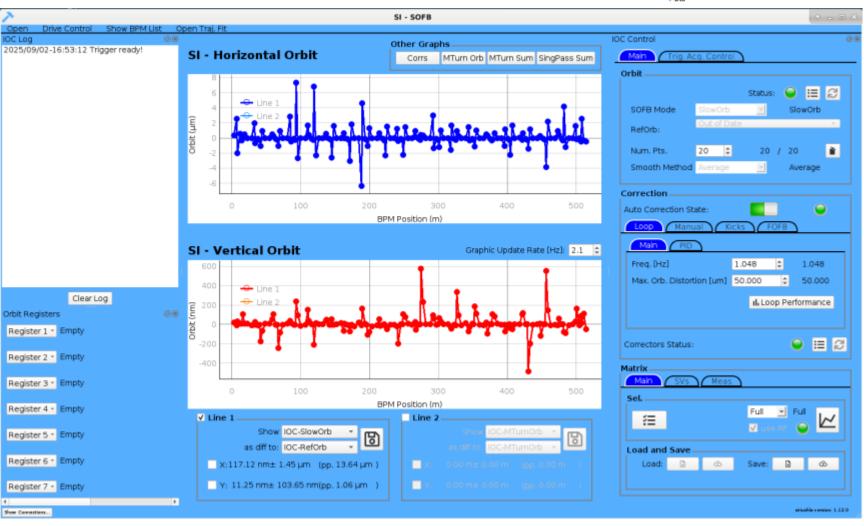
- Implemented in Python, making use of PyQt;
- Easy integration with python libraries, advanced scripting and complex interfaces;
- Extensive list of widgets;
- Drag and drop display builder integrated with QtDesigner;
- EPICS and Archiver plugins;
- Most of SIRIUS GUIs were made with PyDM.





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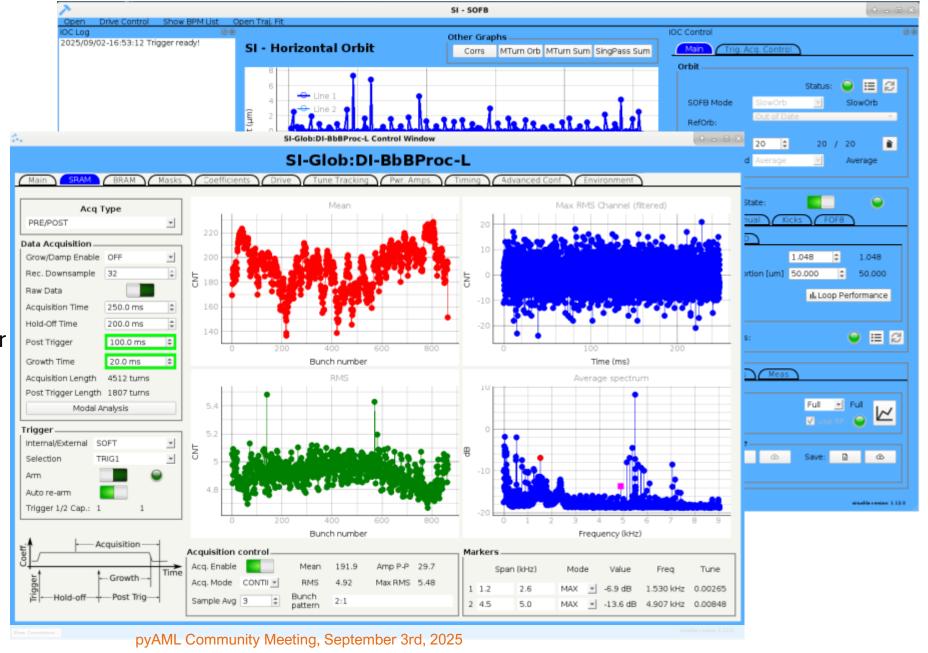






#### PyDM:

- Implemented in Python, making use of PyQt;
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- EPICS and Archiver plugins;
- Most of SIRIUS GUIs were made with PyDM.



# Python Servers: PCASpy, PythonSoftIOC, ...







- PCASpy allows writing EPICS IOCs in python;
- Easy to use. Even users with little knowledge of EPICS (such as myself), can write their own IOCs;
- Support for most of the PV data types;
- IOC programming must be done in python: no records to embed logic;
- Good option to create IOCs to provide abstraction layers to the control system (soft IOCs), such as:
  - Configurations data;
  - Accelerators model data;
  - Implementation of measurement scripts;
  - Slow orbit correction (performance bottlenecks in traditional IOC);
  - PVs translations and unit conversions;
  - Hardware abstraction IOCs;
  - ...
- Most of SIRIUS soft IOCs and all power supplies IOCs were implemented with PCASpy.

```
#!/usr/bin/env python
       from pcaspy import Driver, SimpleServer
 4
       prefix = 'MTEST:'
       pvdb = {
           'RAND' : {
               'prec': 3,
 8
           },
10
11
       class myDriver(Driver):
12
           def init (self):
13
               super(myDriver, self). init ()
14
15
       if name == ' main ':
16
           server = SimpleServer()
17
           server.createPV(prefix, pvdb)
18
           driver = myDriver()
19
20
21
           # process CA transactions
           while True:
22
               server.process(0.1)
23
```

#### References





Getting started with EPICS — EPICS Documentation

EPICS R3.15 Channel Access Reference Manual

**Channel Access Protocol Specification** 

Channel Access

EPICS Archiver Appliance — archiverdocs 0.1 documentation

Epics Channel Access for Python — Epics Channel Access for Python

<u>caproto: a pure-Python Channel Access protocol library — caproto 1.2.0 documentation</u>

Control System Studio

PyDM - Python Display Manager — PyDM 1.27.2 documentation

pythonSoftIOC — pythonSoftIOC 4.5.0+22.g8c4b516 documentation

PCASpy Documentation — pcaspy 0.8.1 documentation





# Thank you for your attention!

Many thanks to Érico Rolim for his valuable feedback on this presentation and for helping me understand key concepts related to EPICS!