

Opendiem Training

Technical Note

Generate .csv Reports & Send to ftp Site

Opendiem-TECH-0010

Revision	5.0.1		
Status	Initials	Date	Comment
Released	RAC	05/13/2013	



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Technical Notes, Generate a .csv Report from Logged Data and Send to an ftp Site

Introduction

By using Opendiem’s built in Reporter and Scheduler Services, logged data can be shared with external sources and programs in .csv file format. The process can be further automated if your server has internet access by sending the data to an external ftp site.

Instructions

1. From the Opendiem Services Engine, choose Add Service and create a new Reporter Service.
 - a. Give each Service an unique name.



2. Double-click the new Reporter Service to open, and then click on the “General” tab.
 - a. Choose the “File Creation Mode” radio button.



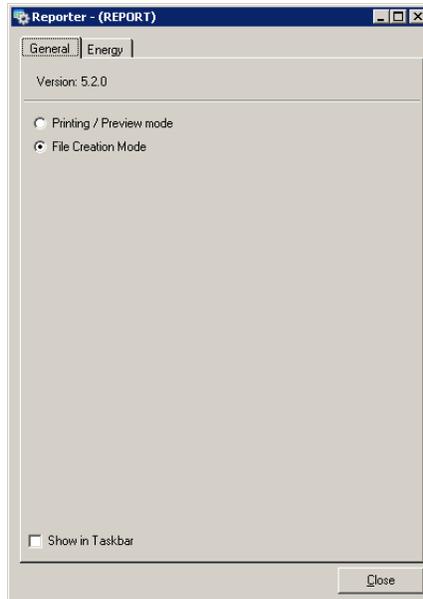
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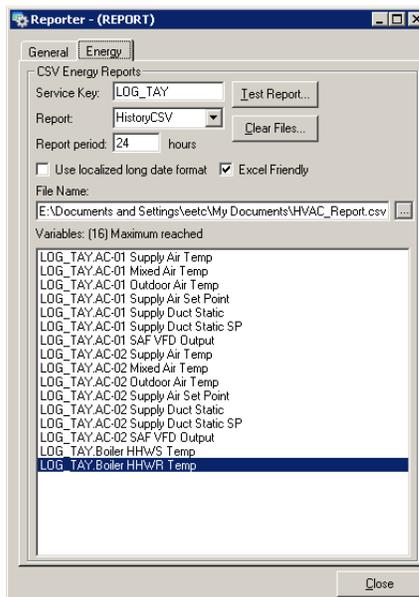
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3. Choose the “Energy” tab (Energy is the default name for report types, it cannot be changed)
 - a. Enter the name of your Data Logger Service in the “Service Key” box.
 - b. Choose your report type, in this case we’ll use HistoryCSV.
 - c. Enter the desired Report period in hours, ie 24 for 24 hours worth of historical data from the time the report is generated (done through the Scheduler Service, discussed later in this document).
 - d. Use the check boxes for data format options (localized long, or logger date/time), and Excel Friendly if importing to a spreadsheet.



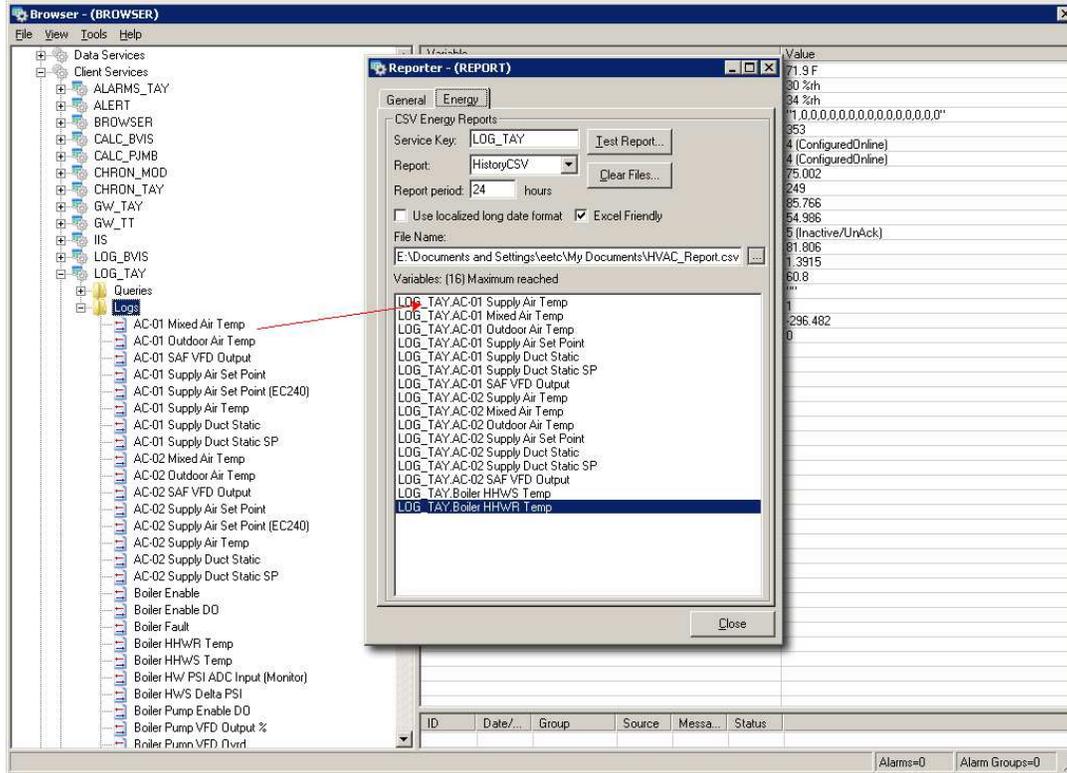


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e. Drag and drop up to 16 logged variables into the window, these will appear in your report.



4. From the Opendiem Services Engine, choose Add Service and create a new Scheduler Service.
 - a. Give each Service an unique name.





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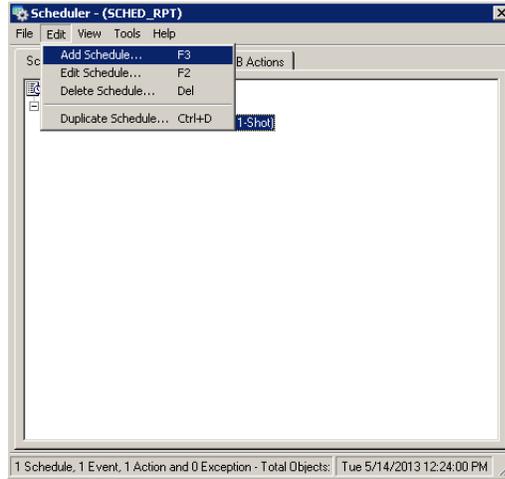


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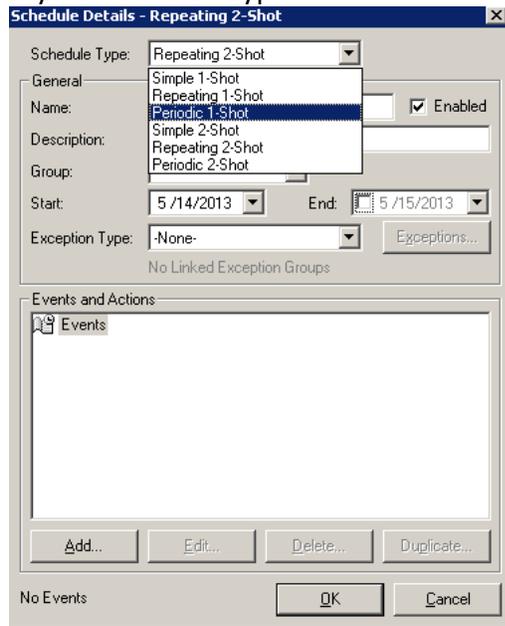


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5. Double-click the new Scheduler to open the service and begin defining your report schedule.
 - a. From the Edit Menu, pick “Add Schedule ...”



- b. Choose “Periodic 1-Shot” for your Schedule Type



- c. Fill in your Schedule Details by giving it a Name and Description and assigning it to a Group.
 - d. Enable your Scheduler, and pick Start and End dates as appropriate.
 - e. Use the drop down menu to add any exceptions (Holidays, etc.) that have been defined.
 - f. Click the “Add ...” button to define the ON Time and frequency for this schedule.

6. Name your Event, and then choose the ON Time to run your report and the frequency of the report.



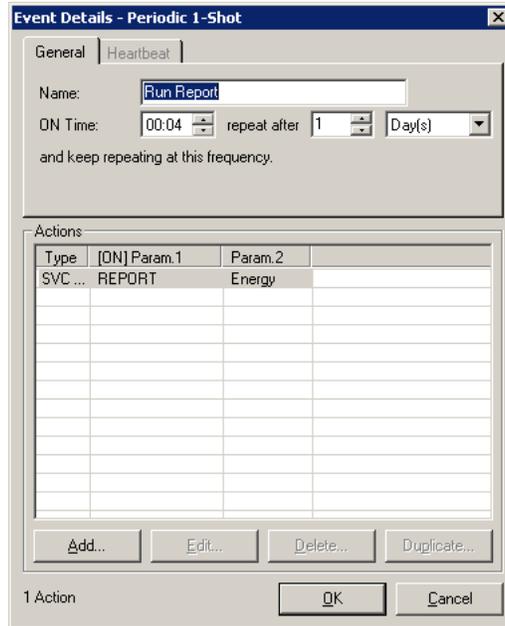
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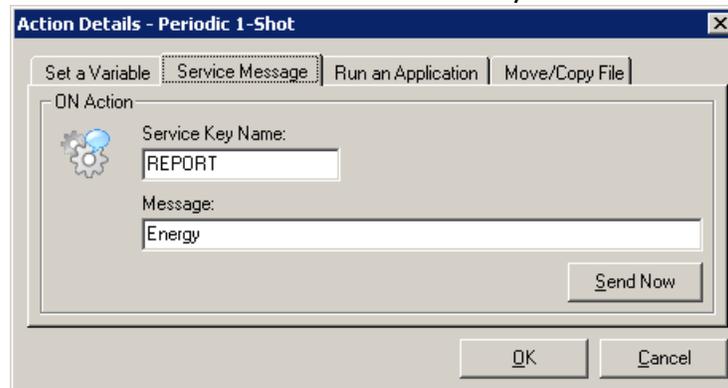
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7. Click the “Add ...” button to define the actions for this schedule, click on the “Service Message” tab.
 - a. Enter the name of your Reporter Service in the Service Key Name section.
 - b. Enter Energy in the Message section.
 - c. You can test your report by using the “Send Now” button.
 - i. Your .csv file will be created in the folder that you defined in the Reporter Service.



8. After clicking “Ok”, add a new action. From the “Event Details – Periodic 1-Shot” window click the “Add ...” button and choose the “Move/Copy File” tab.
 - a. Choose the “FTP” radio button, enter or select the location of your .csv file which you defined in the Reporter Service.
 - b. Enter the details and credentials for your ftp location.



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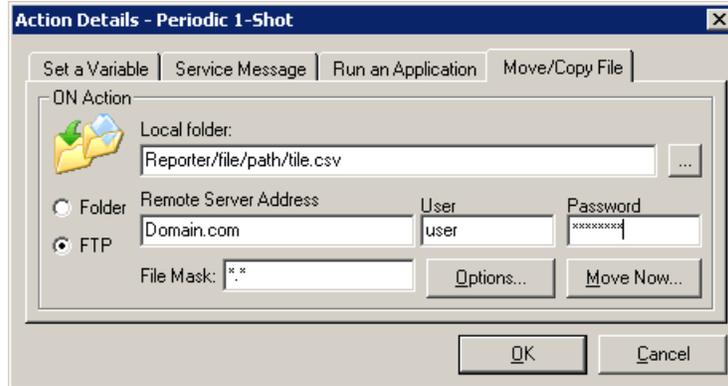


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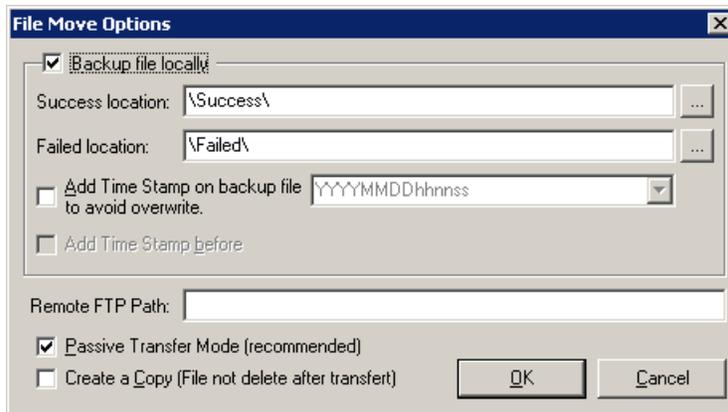


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- i. Enter only the domain of the Remote Server Address, you do not need to add ftp://.
- c. If there are other files that you don't want sent in the folder you can use the File Mask section to only move your .csv files (ie *.csv).
- d. You can test your ftp settings by clicking on the "Move Now ..." button.



- e. To set file move options, click the "Options ..." button.
 - i. The files can be backed up locally by adding a date/time stamp to each file name.



9. Use your ftp site settings to manage files after they have been transferred.



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Notes:

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