Opendiem Training

Technical Note

Generate .csv Reports & Send to ftp Site

Opendiem-TECH-0010

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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

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



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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Reporter - (REPORT)	
General Energy	
Version: 5.2.0	
O Printing / Preview mode	
File Creation Mode	
Show in Taskbar	
	<u>C</u> lose

- 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.

🗞 Reporter - (REPORT)			
CSV Energy Benette			
Service Key: LOG_TAY			
Report: HistoryCSV Clear Files			
Report period: 24 hours			
Use localized long date format 🔽 Excel Friendly			
File Name:			
E:\Documents and Settings\eetc\My Documents\HVAC_Report.csv			
Variables: (16) Maximum reached			
Valiables: (10) ModRMINI recorred [L0G, TAYAC01 Supply Ar Temp L0G, TAYAC01 Supply Ar Set Point L0G, TAYAC01 Supply Duct Static L0G, TAYAC01 Supply Ouct Static L0G, TAYAC01 Supply Ouct Static L0G, TAYAC01 Supply Ouct Static L0G, TAYAC02 Supply Ar Temp L0G, TAYAC02 Supply Ar Set Point L0G, TAYAC02 Supply Duct Static SP L0G, TAYAC02 SAFY PD Udput L0G, TAYAC02 SAFY DUct Static SP L0G, TAYABoler HHWR Temp L0G, TAYBoler HHWR Temp L0G, TAYBoler HHWR Temp			



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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.

	Services	ر المر			
	Name	Ready	Status		
1 - L	Add Service	Yes			
	User & Server Connection	s Yes	0/20 connect	tion	
nondiam	LonWorks (Lf Add New S	ervice		×	
pendiem	Modbus (MOI				
	Suctor (SVS)				
	System (SYS	ent Services		_	
Main	System (SYS	Alarm Manager			
in the state	Standard (ST	Calculator			
Coourity	🐻 Alarm Manag	Chronos			
security	Nerts (ALER	Data Gateway			
	Sengine Brow:	Data Logger			
Services	📲 Calculator (C	Engine Browser			
	Calculator (C	IIS Connector			and a second care
Support	Chronos (CH	Peporter			Actions in 1 Action List
	Chronos (CH	Scheduler			W Actions in 35 Action Lists
	Data Gatewa	Scrolling Chart		-	
	IIS Connecto	ta Sarvicar			
	Data Logger	QK	Cancel	Help	
	Data Logger	103	Thomas		
	Data Logger (LOGALYTICS	i) Yes	Ready		
	🖏 Data Logger (LOGGER_MO	D) Yes	Ready		
	Departer (DEDODT)	Vec	Deady		



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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

ichedule Details -	Repeating 2-Shot	×
Schedule Type: General Name: Description: Group: Start:	Repeating 2-Shot Simple 1-Shot Repeating 1-Shot Periodic 1-Shot Repeating 2-Shot Repeating 2-Shot Periodic 2-Shot S /14/2013 End: 5 /15/2013	
Exception Type:	-None- Exceptions	
	No Linked Exception Groups	1
Performance Action	8	
<u>A</u> dd	Edit Delete Duplicate	
No Events	<u> </u>	

- 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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Event Details - Periodic 1-Sl	not	×
General Heartbeat		
Name: Fun Report ON Time: 00:04 -	repeat after 1	Day(s)
Actions		
Type [ON] Param.1	Param.2	
SVC REPORT	Energy	
Add	<u>D</u> elete	. Du <u>p</u> licate
1 Action	<u>0</u> K	<u>C</u> ancel

- 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.

Action Detai	s - Periodic 1-Shot 🛛 🗙
Set a Varia	ble Service Message Run an Application Move/Copy File Service Key Name: REPORT Message: Energy
	<u>S</u> end Now
	<u> </u>

- 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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- 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.

Action Details - Periodic 1-Shot 🛛 🔀			
Set a Variabl	le Service Message Run an Application Move/Copy File		
C Folder	Reporter/file/path/tile.csv Remote Server Address User Domain.com user		
	File Mask: <u>D</u> ptions <u>Move Now</u>		
	<u> </u>		

- 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.

F	File Move Options				
	Backup file loc	ally			
	Success location:	\Success\			
	Failed location:	\Failed\			
	□ <u>A</u> dd Time Stam to avoid overwr	p on backup file YYYYMMDDhhnnss			
	🗖 Add Time Stam	p <u>b</u> efore			
	Remote FTP Path:				
	🔽 Passive Transfe	er Mode (recommended)			
	Create a <u>C</u> opy (File not delete after transfert)			

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



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Notes:

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