

Trend Export v2.3.2 User Guide

User Guide for v6.5 or later



Important changes are listed in Document revision history at the end of this document.

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What is the Trend Export add-on?

The Trend Export add-on allows you to specify, manage, and export:

- trend source data to .csv files
- trend source data into zipped folders of multiple .csv files
- trend source data into an external database

You can export the files on-demand at any time or at scheduled intervals allowing you to process or analyze trend data outside of your building automation system.



TIPS

- If exporting to a database, we recommend having access to a database administrator or someone comfortable in setting up databases while setting up this add-on.
- To ensure a daily sample for all points that are sampling on COV, set the trend to collect a daily midnight sample. Edit the setting on the driver's **Properties** page under **Trend Sampling**.
- If trend data is being exported for external consumption, verify at what frequency they are expecting to receive the data. For example, if they expect the data every 15 minutes, set the trend interval for less than 15 minutes and write to Trend Historian every few samples.



CAUTION:

If you are upgrading from a previous version of Trend Export:

To avoid losing any data, you must uninstall the previous version while keeping the data.

See *Installing an Add-on User Guide* for more information.

Prerequisites

- 1 If you want to use your existing v6.0 or earlier Trend database as the source database for the Trend Export add-on, first replicate the database, then use the replica for Trend Export.
- 2 You have upgraded to v6.5 or later and installed the latest cumulative patch
- 3 You have downloaded trendexport.addon
- 4 You have purchased and downloaded the Trend Export license
- 5 You have adequate disk space available to store the exported files (see "*Scheduling your groups for export* (page 7)")

See "Installing an Add-on User Guide" for the following:

- Installing an add-on
- Applying a license
- Running an add-on
- Upgrading an add-on

Connecting to the Export Trends database

You must connect your newly created Trends database copy to the add-on.

- 1 Click **Settings > Database Settings** to enter the following information (see table below).
- 2 Click **Test Connection** to verify the database is communicating.

Main Database Connect String:

Database Type	Select the type of database from the droplist used by your Trend Export database.
Server	Type the name or IP address of the machine that the Export Trends database is on.
Port	Type the port number the Export Trends database will use for communication.
Instance	The name for your Export Trends database.

Database User:

Login	Type your database user login name.
Password	Type your database user password.

Trend Database Expiration:

Enable Trend Expiration	Check this checkbox to prevent the Trend Export database from becoming too large and enter a value in the Trend Expiration Interval Days field below.
Trend Expiration Interval Days	Type a value between 1 and 999 appropriate to the size of your database.






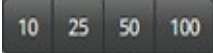
Working with groups

You can assign trend data sources to groups that allow you to collect the data and send it to .csv files or an external database on-demand or at scheduled times for a specified time range. You can create and manage your groups on the **Manage Groups** page.

To view your groups

Use the **Trend Group Definitions** table when managing your groups of trend data sources.













- 1 Click the **Manage Groups** tab.
- 2 View the list of groups in the list under **Trend Group Definitions**.

Use this button...	to...
 Copy	copy an existing group to create a new one; then edit as needed.
 Edit	display the Edit Group Definition table; list appears below the Trend Group Definitions table. See <i>Editing Group Definitions</i> (page 3).
 Delete	delete the group from the list.
 List	display the list of trend sources configured for export; list appears below the Trend Group Definitions table.
 History	display the list of data collections already run; list appears below the Trend Group Definitions table. See <i>Trend Data Export History</i> (page 8).
	limit the number of groups displayed in the table.

Manage Groups Settings Export History
Help Logout

Manage Groups

Trend Group Definitions


Actions	Name ▾	Id ▾	Schedule ▾	Export Format ▾	Manual Export
    	PrestigeRooftopBoiler	PrestigeRooftopBoiler	Hourly	csv per group	1 day of data ▾ 
    	Holland	Holland	Daily	csv per source	1 day of data ▾ 

[Create New Group](#)

10 25 50 100

To create a new group

Use the **Edit Group Definition: New Groups** table when managing your groups of trend data sources.

- 1 Click the **Manage Groups** tab.
- 2 Click **Create New Group** () in the lower left.
- 3 Type a unique group name in the **Name** field.
- 4 Edit the auto-filled **Id**, if needed.

5 Select an item from the **Schedule** droplist that determines how often the collected data should be exported:


- | | |
|--------------------|---|
| Hourly | Select to export trend samples every hour unless suspended or deleted |
| Daily | Select to export trend samples every hour unless suspended or deleted |
| Unscheduled | Select if you only wish to run this export on an as-needed basis |

6 Select from the **Export Format** droplist:

- | | |
|-----------------------------------|---|
| single csv per source | Select to produce a .zip file containing one .csv file for each source in the group |
| single csv per group | Select to produce one .csv file using the trend ID for the group |
| Relational Database Format | Select to populate an historical trends database |

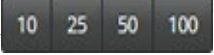
7 Select the time range of data you want collected in the initial report from the **Initial Export Range** droplist.

8 From the **Export Fields** choices, select one or more fields to be included in the file if needed.

9 Under **Trend Scope Selection**, select any areas, locations, or points to be exported as part of this group, then click **Add** (.

10 Under **Selected Trend Scopes**, click **Filter** (.

NOTE If you have selected more than 10 items under **Trend Scope Selection**, you will need to


click one of the page number buttons () to see the remainder of the list.

11 Under **Source Selection per Source**, select all sources or check the individual sources within the scope to be exported.

12 Click **Save**.



TIPS

- If the initial report fails, do one of the following:
 - Increase the java memory/heap in the core console at: /help/about <server_name>/Java VM /Memory settings.
 - Reduce the number of points in the group by de-selecting areas, locations, or points from the **Trend Scope Selection** field (or the items in the **Source Selection per Source field**).
 - Select a smaller time range from the **Initial Export Range** droplist.
- Create a duplicate of an existing group and edit any of its fields. To duplicate a group, select it in the **Manage Groups** list and click the **Copy** button (.

To view a group's export history


Use the **Trend Data Export History** table on the **Manage Groups** tab to view the detailed history of each of your trend data runs for a single group.

To display the Export History table

Click the **Trend History** button () to the right of the group name.

To edit a group

Use the **Edit Group Definitions** table when managing your groups of trend data sources.

- 1 Click the **Manage Groups** tab.
- 2 Scroll through the list and select the group in the list or click **Edit** () to the left of the entry.
- 3 Edit the fields as needed (see *To create a new group* (page 3) for field information).
- 4 Click **Update Data**.

NOTE If you decide not to save your changes, you can scroll up to the **Trend Group Definitions** table and click anywhere in the list before clicking **Update Data**.

Edit Group Definition: Prestige Rooftop Boiler

Trend Source Group Details

Name (Unique)	<input type="text" value="Prestige Rooftop Boiler"/>	Schedule	<input type="text" value="Hourly"/>
Id (Unique 25 char limit)	<input type="text" value="PrestigeRooftopBoiler"/>	Export Format	<input type="text" value="csv per group"/>
		Initial Export Range	<input type="text" value="1 day of data"/>

Trend Scope Selection

Selected Trend Scopes

Tree Scope	Actions
Prestige Corp / Rooftop * / Boiler Plant	<input type="button" value="↓"/> <input type="button" value="✖"/>

10 25 50 100

Source Selection per Scope

Export all sources within selected scope

Select sources to export within selected scope

<input type="checkbox"/> B1 HWS Temp	<input type="checkbox"/> B2 HWS Temp
<input type="checkbox"/> B3 HWS Temp	<input type="checkbox"/> Blr Sequence
<input type="checkbox"/> BLR1 Fail Order	<input type="checkbox"/> BLR1 Order
<input type="checkbox"/> BLR2 Fail Order	<input type="checkbox"/> BLR2 Order
<input type="checkbox"/> BLR3 Fail Order	<input type="checkbox"/> BLR3 Order
<input type="checkbox"/> Boiler_1	<input type="checkbox"/> Boiler_1

Managing the system settings

Use the **System Settings** tab to manage the export process settings and to view the definitions of the schedule types used by any of your groups.

To edit the system site settings

- 1 Click the **System Settings** tab to edit any of the following fields:

Field	Description
Enable artifact auto-deletion	Enable to delete any artifacts older than the number of days defined in the following field.
Delete artifacts on disk older than specified # of days	Automatically deletes artifacts older than the number of days entered; specify up to 180 days. Adjust this value if you find the file sizes too large.
Suspend export process	Enable to immediately stop the export process for any groups actively being exported or ready to be exported.
Export artifact directory	Name of the archive directory location within the trend export add-on folder.
Site identifier	Unique name for the system site - this allows many systems or hierarchical systems to save archive files in a common shared directory without the potential for filename collisions.
Daily schedule start hour	For daily run, select the hour of the day you want the export to start
Hourly schedule start minutes	For hourly run, select the minute within the hour you want the export to start
Enable verbose logging	Check this checkbox to log additional information as directed by Technical Support.

- 2 Click **Save Settings**.

To view the schedule type definitions

Click the **System Settings** tab and view the definitions for **Daily** and **Hourly** exports.

Scheduling groups for export

You can export in two ways - on a set schedule or immediately:


Set up an export schedule





Use this method to set up a schedule that always runs at a specific time. You can set this up when you *create* (page 3) your group on the **Edit Group Definition** page for the group. Or, the schedule can be *edited* (page 3) any time later.

Manually export immediately

Use this method when you don't need the export performed on a set schedule. For example:

- when setting up a new group, you could manually export to determine the size of the file created.
- when you create a group that doesn't need to be run on a regular basis.

Use the **Manual Export button** on the **Manage Groups** tab to export your groups as needed. Under **Manual Export**, select the time range desired, then click the **Manual Export** button () to the right of the group:

Export Format ▾	Manual Export
group	1 day of data 
source	2 years of data 
source	1 year of data 
	3 months of data 
	30 days of data
	7 days of data
	1 day of data 100
	1 hour of data

Viewing which trend sources are configured for export

Use the **Edit Group Definitions** table when managing your groups of trend data sources.

- 1 Click the **Manage Groups** tab.
- 2 Scroll through the list to verify which trend sources have been configured for export.
- 3 Click the arrows on the column headers to sort the list.


Edit Group ▾	Data Type ▾	Buffer Size ▾	Report Trigger ▾	Lookup Key ▾
Floor 09 * / Fire / Tenant 04 * / alarm	Digital	300	135	ABSPATH:1:#floor09_edwards_fire/alarm_tn







10 25 50 100

Viewing the Trend Data Export History

Use the **Trend Data Export History** table on the **Export History** tab to view the detailed history of each of your trend data runs.

NOTES

- Any failed items in the list are highlighted in red.
- Filter the list by entering a **Group Name** or by selecting an item from the **Schedule** or **Status** droplist.
- Sort the list by clicking on any column header names that are followed by up or down arrows.
- Download any of the history files by clicking the **Download** button () to the left of the file you want to save or view.

Trend Data Export History											
Actions	Group Name	Status	Sources	Failed Sources	Sample Count	Group Id	Run Time	Start Time	End Time	Schedule Time	Schedule
 	Prestige Rooftop Boiler	Successful	0	0	0	PrestigeRooftopBoiler	00:00:00	Fri Sep 09 12:03:00 EDT 2016	Fri Sep 09 12:03:00 EDT 2016	Fri Sep 09 12:03:00 EDT 2016	Hourly
 	Prestige Rooftop Boiler	Successful	0	0	0	PrestigeRooftopBoiler	00:00:00	Fri Sep 09 12:00:00 EDT 2016	Fri Sep 09 12:00:00 EDT 2016	Fri Sep 09 12:00:00 EDT 2016	Hourly
 	Prestige Rooftop Boiler	Successful	0	0	0	PrestigeRooftopBoiler	00:00:00	Fri Sep 09 11:57:00 EDT 2016	Fri Sep 09 11:57:00 EDT 2016	Fri Sep 09 11:57:00 EDT 2016	Hourly

Each time the trend data is collected, the following files are produced:

- When the export starts for each group, a folder is created in the **webapps** directory of the current system. The artifact is uniquely named with the combination of GroupID, ScheduleID and the export timestamp.
- A folder is converted to a .zip file on successful completion of the export process. The .zip file has details on run parameters, index file, and file description.
- Multisource .csv files include individual trend IDs in the file description.

Appendix

Index file

The INDEX.json file is in the .zip file found in /webroot/' system' /webapp_public/trendexport/exportartifacts. The index file contains the table of contents of the .zip file which describe the format of the:

- CSV files (headers)
- Meta data describing the trend's source ID, display path, display name, and location (system reference name) contained here. The trend's source ID value is very important, as it is used in the name of the single source CSV files stored as a peer to this file.

NOTE If you move a piece of equipment within the tree, a new sourceId is assigned to it at the new location.

Where to find the INDEX file

Name	Size	Packed Size	Created	Accessed	A
INDEX.json	35 726	5 703	2016-11-23...	2016-11-23 09:23	
RUNPARAMETERS.json	916	414	2016-11-23...	2016-11-23 09:23	
TrendData_0041F3A03F882A09BA88B6B1AD51E4D8.csv	0	2	2016-11-23...	2016-11-23 09:23	
TrendData_0100448F693F56F972D7C75E72ABC60F.csv	0	2	2016-11-23...	2016-11-23 09:23	
TrendData_010C3D61B243CD72D2528FF331B6B3E3.csv	0	2	2016-11-23...	2016-11-23 09:23	
TrendData_06ED68534B820D653F83DBD7A491DA8D.csv	84	43	2016-11-23...	2016-11-23 09:23	
TrendData_087E9D3635B5958AD2A02AD3E7F47E48.csv	0	2	2016-11-23...	2016-11-23 09:23	
TrendData_09903CE2C1F624D5C5DA8A46F18F8724.csv	0	2	2016-11-23...	2016-11-23 09:23	

What is in the INDEX file

Code Fields	Descriptions
sourceId	Unique identifier for the trend source EXAMPLE: 0041F3A03F882A09Ba88B6B1AD51E4Db
displayPath	Path to the trend source in the GEO tree EXAMPLE: BAS / OA Conditions / update stamp
displayName	Name displayed for the trend source EXAMPLE: update stamp
locationId	Location of the trend in the GEO tree If this changes, a new sourceId is assigned to the trend at the new location EXAMPLE: ABSPATH:1:#oa_conditions/update stamp_tn









EXAMPLE:

```
{
  "description" : "Trend Export Source Index",
  "combinedTidFileCsvHeaders" : [ "sourceId", "sampleTime", "sampleValue" ],
  "separateTidFileCsvHeaders" : [ "sampleTime", "sampleValue" ],
  "indexEntries" : [ {
    "sourceId" : "0041F3A03F882A09BA88B6B1AD51E4DB",
    "displayPath" : "BAS / OA Conditions / update stamp",
    "displayName" : "update stamp",
    "locationId" : "ABSPATH:1:#oa_conditions/update stamp_tn",
    "error" : ""
  }, {
    "sourceId" : "01004E03A392A09BA88B6B1AD57F2894",
    "displayPath" : "BAS / Zone Applications / VAV Terminal ZS / Heat",
    "displayName" : "Heat",
    "locationId" : "ABSPATH:1:#vav_terminal_zs_/heat_tn",
    "error" : ""
  }, {
    "sourceId" : "00403F8827A1F3A14A392A09Ba88B6B1",
    "displayPath" : "BAS / Zone Applications / VAV AHU / Sup Fan S/S",
    "displayName" : "Sup Fan S/S",
    "locationId" : "ABSPATH:1:#vav_ahu/sfan",
    "error" : ""
  }
]
}
```

RunParameters file

The RUNPARAMETERS.json file is in the .zip file found in /webroot/' system' /webapp_public/trendexport/exportartifacts. This file contains runtime information from the export operation instance:

- Selection data range
- Schedule name
- Status
- Stats such as sample count, trend source count, start and end times

Name	Size	Packed Size	Created	Accessed	A
 INDEX.json	35 726	5 703	2016-11-23...	2016-11-23 09:23	
 RUNPARAMETERS.json	916	414	2016-11-23...	2016-11-23 09:23	
 TrendData_0041F3A03F882A09BA88B6B1AD51E4D8.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_0100448F693F56F972D7C75E72ABC60F.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_010C3D61B243CD72D2528FF331B6B3E3.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_06ED68534B820D653F83DBD7A491DA8D.csv	84	43	2016-11-23...	2016-11-23 09:23	
 TrendData_087E9D3635B5958AD2A02AD3E7F47E48.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_09903CE2C1F624D5C5DA8A46F18F8724.csv	0	2	2016-11-23...	2016-11-23 09:23	
.....

EXAMPLE:

RUNPARAMETERS.json









```
{
  "description" : "Trend Export Runtime Parameters",
  "groupName" : "MELGR25 AIBI",
  "groupId" : "MELGR25AIBI",
  "scheduleId" : "hourly",
  "runStatus" : "@lang_Artifact_Success",
  "totalSampleCount" : 14077602,
  "trendSourceCount" : 1600,
  "exportStartTime" : "Tue Sep 13 10:00:00 EDT 2016",
  "exportStartTimeMs" : 1473775200062,
  "exportEndTime" : "Tue Sep 13 10:01:17 EDT 2016",
  "exportEndTimeMs" : 1473775277177,
  "scheduledStartTime" : "Tue Sep 13 10:00:00 EDT 2016",
  "scheduledStartTimeMs" : 1473775200000,
  "artifactFileName" :
"F:\\BAS6.5_TESTING\\webroot\\de1627\\webapp_public\\trendexport\\exportartifacts\\MELGR25AIBI_hourly_SiteI
d_09-13-2016-10_00_00_AM_EDT.zip",
  "exportDurationMs" : 77115,
  "exportDurationStr" : "00:01:17",
  "artifactLink" : "",
  "artifactId" : "MELGR25AIBI_hourly_SiteId_09-13-2016-10_00_00_AM_EDT",
  "failureCount" : 0
}
```

CSV files

Depending on how each Trend Group was defined to be exported, the trend sample data is provided in one of the following file formats:

- A .zip file containing multiple.csv files per source - one for each source in the group.
Example: TrendData_0041F3A03F882A09Ba88B6B1AD51E4Db.csv
- A single combined .csv file containing data from all sources in the group.
Example: Combined.csv

CSV files per source

Name	Size	Packed Size	Created	Accessed	A
 INDEX.json	35 726	5 703	2016-11-23...	2016-11-23 09:23	
 RUNPARAMETERS.json	916	414	2016-11-23...	2016-11-23 09:23	
 TrendData_0041F3A03F882A09Ba88B6B1AD51E4D8.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_0100448F693F56F972D7C75E72ABC60F.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_010C3D61B243CD72D2528FF331B6B3E3.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_06ED68534B820D653F83DBD7A491DA8D.csv	84	43	2016-11-23...	2016-11-23 09:23	
 TrendData_087E9D3635B5958AD2A02AD3E7F47E48.csv	0	2	2016-11-23...	2016-11-23 09:23	
 TrendData_09903CE2C1F624D5C5DA8A46F18F8724.csv	0	2	2016-11-23...	2016-11-23 09:23	
-----	---	---	---	---	---

EXAMPLE:

	A	B
1	2016-09-12T16:55:24-04:00	70.33683
2	2016-09-12T16:55:27-04:00	72.699524
3	2016-09-12T16:55:30-04:00	75
4	2016-09-12T16:55:33-04:00	77.23195
5	2016-09-12T16:55:36-04:00	79.38927
6	2016-09-12T16:55:39-04:00	82.13938
7	2016-09-12T16:55:42-04:00	83.45653
8	2016-09-12T16:55:45-04:00	85.35534
9	2016-09-12T16:55:48-04:00	87.15724
10	2016-09-12T16:55:51-04:00	88.8573
11	2016-09-12T16:55:54-04:00	90.45085
12	2016-09-12T16:57:51-04:00	88.8573
13	2016-09-12T16:57:54-04:00	90.45085
14	2016-09-12T16:57:57-04:00	91.93353
15	2016-09-12T16:58:00-04:00	50
16	2016-09-12T16:58:03-04:00	52.6168
17	2016-09-12T16:58:06-04:00	55.226425
18	2016-09-12T16:58:09-04:00	57.821724
19	2016-09-12T16:58:12-04:00	60.395584
20	2016-09-12T16:58:15-04:00	62.940952

Combined.csv

One .csv file for the group

Name	Type	Modified	Size	Ratio	Packed	Pa
Combined.csv	Microsoft Excel Comma Separated Values File	9/13/2016 10:00 AM	270,956,787	90%	28,285,935	
INDEX.json	JSON File	9/13/2016 10:00 AM	65,711	95%	2,972	
RUNPARAMETERS.json	JSON File	9/13/2016 10:00 AM	915	57%	396	

EXAMPLE:

	A	B	C
1	06ED68534B820D653F83DBD7A491DA8D	2016-03-08T08:45:00-05:00	1
2	06ED68534B820D653F83DBD7A491DA8D	2016-03-08T09:40:00-05:00	1
3	06ED68534B820D653F83DBD7A491DA8D	2016-03-08T16:55:00-05:00	1
4	0A7254B9F65C2E9FC3FA5A2D6B773920	2016-03-08T08:45:00-05:00	1
5	0A7254B9F65C2E9FC3FA5A2D6B773920	2016-03-08T09:40:00-05:00	1
6	0A7254B9F65C2E9FC3FA5A2D6B773920	2016-03-08T16:55:00-05:00	1
7	0D9E4829525E3290AA300FB03975CDAC	2016-03-07T09:05:00-05:00	55
8	0D9E4829525E3290AA300FB03975CDAC	2016-03-07T09:10:00-05:00	55
9	0D9E4829525E3290AA300FB03975CDAC	2016-03-07T09:15:00-05:00	55

Uploading files to a remote user

If updated or newly created artifact files must be uploaded to a remote server, the process can be automated. While there are many ways to do this, below is one method to accomplish it in a Windows® environment.

Tools required

Use...	to...
WinSCP - FTP client	push or upload the artifact files. https://winscp.net/eng/index.php
Windows Task Scheduler	automate the upload using the Microsoft® Windows® Scheduling tool found in the Control Panel.

In the example below, this task will run every five minutes, executing a script. The script will then synchronize the data, uploading any changed or newly created artifacts to the remote location.

Step 1: Set up FTP client

- 1 Verify that the remote location where the files will be pushed has already been defined and configured.
- 2 Verify that the remote location has an FTP server listening for incoming files.
- 3 Set up the FTP client using a script. The script will open the FTP connection pointing to the remote FTP server and upload the files. For more information regarding the FTP client, see the link above.

Script.txt

```
open ftp://username:password@xxx.xxx.xxx.xxx/  
synchronize -filemask="*.zip" remote c:\temp\artifacts\ /home/storedata  
exit
```

The "synchronize" step in the script above is used to detect changes in the source folder. For additional information on the syntax of the script file including encryption options, see https://winscp.net/eng/docs/scriptcommand_synchronize#examples

NOTE If you chose to use a different FTP client, it may not contain a synchronize feature similar to WinSCP. If it does not, you must implement an additional step, such as a batch file, that manually checks for file changes in the artifacts folder.

Step 2: Automate the upload process when modifications are present

- 1 Launch **Task Scheduler** from **Control Panel > Administrative Tools**.
- 2 Under **Actions**, click **Create Task**.
- 3 On the **General** tab:
 - a) Type a file name, such as `ftp`.
 - b) Select **Run whether user is logged on or not**.
 - c) Check **Run with highest privileges**.

- 4 On the **Triggers** tab:
 - a) Click **New**.
 - b) Under **Settings**, select **Daily**.
 - c) Under **Advanced Settings**, check **Repeat task every**; then select time increment such as every 5 minutes.
 - d) Select **Enabled**.
 - e) Click **OK**.
- 5 On the **Actions** tab:
 - a) Click **New**.
 - b) Under **Settings**, browse to **WinSCP.exe**:
C:\Program Files (x86)\WinSCP\WinSCP.exe
 - c) In the **Add arguments** text field, type:
/log=C:\LogfileDir\WinSCP.log /script=C:\LogfileDir\script.txt
 - d) Click **OK**.
- 6 Click **OK**.

Document revision history

Important changes to this document are listed below. Minor changes such as typographical or formatting errors are not listed.

Date	Topic	Change description	Code*
		No changes yet	

* For internal use only