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# **VOLTTRON Documentation**

***Release 8.2***

**The VOLTTRON Community**

**Oct 03, 2022**



# INTRODUCTION

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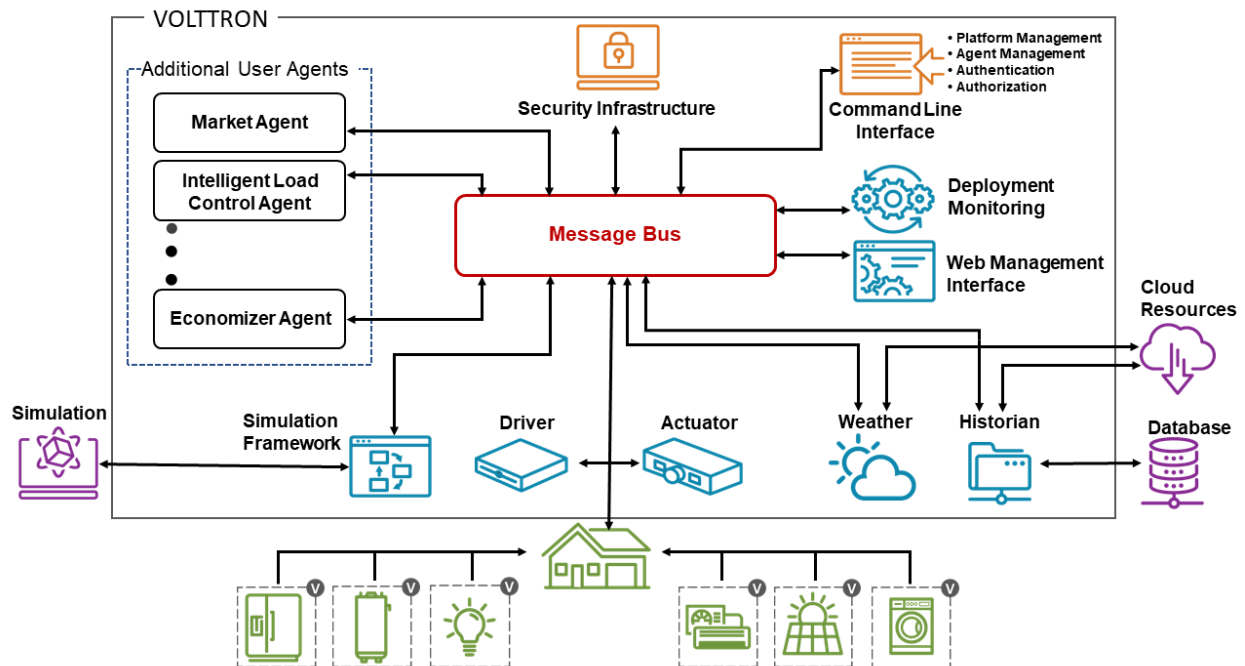


VOLTTRON™ is an open source, scalable, and distributed platform that seamlessly integrates data, devices, and systems for sensing and control applications. It is built on extensible frameworks allowing contributors to easily expand the capabilities of the platform to meet their use cases. Features are implemented as loosely coupled software components, called agents, enabling flexible deployment options and easy customization.



## KEY USE-CASES

- Developing scalable, reusable applications to deploy in the field without spending development resources on operational components not specific to the application
- Low-cost data collection deployable on commodity hardware
- Integration hub for connecting a diverse set of devices together in a common interface
- Testbed for developing applications for a simulated environment





## FEATURES

- A *message bus* allowing connectivity between agents on individual platforms and between platform instances in large scale deployments
- Integrated security features enabling the management of secure communication between agents and platform instances
- A flexible *agent framework* allowing users to adapt the platform to their unique use-cases
- A configurable *driver framework* for collecting data from and sending control signals to buildings and devices
- automatic data capture and retrieval through our *historian framework*
- An extensible *web framework* allowing users and services to securely connect to the platform from anywhere
- Capability to interface with simulation engines and applications to evaluate applications prior to deployment

VOLTTRON™ is publicly available from [GitHub](#). The project is supported by the U.S. Department of Energy and receives ongoing updates from a team of core developers at PNNL. The VOLTTRON team encourages and appreciates community involvement including issues and pull requests on Github, meetings at our bi-weekly office-hours and on Slack. To be invited to office-hours or slack, please [send the team an email](#).

## 2.1 Installing the Platform

VOLTTRON is written in Python 3.6+ and runs on Linux Operating Systems. For users unfamiliar with those technologies, the following resources are recommended:

- [Python 3.6 Tutorial](#)
- [Linux Tutorial](#)

This guide will specify commands to use to successfully install the platform on supported Linux distributions, but a working knowledge of Linux will be helpful for troubleshooting and may improve your ability to get more out of your deployment.

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**Note:** Volttron version 7.0rc1 is currently tested for Ubuntu versions 18.04 and 18.10 as well as Linux Mint version 19.3. Version 6.x is tested for Ubuntu versions 16.04 and 18.04 as well as Linux Mint version 19.1.

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### 2.1.1 Step 1 - Install prerequisites

The following packages will need to be installed on the system:

- git
- build-essential
- python3.6-dev
- python3.6-venv
- openssl
- libssl-dev
- libevent-dev

On **Debian-based systems**, these can all be installed with the following command:

```
sudo apt-get update
sudo apt-get install build-essential python3-dev python3-venv openssl libssl-dev
↳ libevent-dev git
```

On Ubuntu-based systems, available packages allow you to specify the Python3 version, 3.6 or greater is required (Debian itself does not provide those packages).

```
sudo apt-get install build-essential python3.6-dev python3.6-venv openssl libssl-dev
↳ libevent-dev git
```

On arm-based systems (including, but not limited to, Raspbian), you must also install libffi-dev, you can do this with:

```
sudo apt-get install libffi-dev
```

---

**Note:** On arm-based systems, the available apt package repositories for Raspbian versions older than buster (10) do not seem to be able to be fully satisfied. While it may be possible to resolve these dependencies by building from source, the only recommended usage pattern for VOLTTRON 7 and beyond is on raspberry pi OS 10 or newer.

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On **Redhat or CENTOS systems**, these can all be installed with the following command:

```
sudo yum update
sudo yum install make automake gcc gcc-c++ kernel-devel python3-devel openssl openssl-
↳ devel libevent-devel git
```

**Warning:** Python 3.6 or greater is required, please ensure you have installed a supported version with `python3 --version`

If you have an agent which requires the pyodbc package, install the following additional requirements:

- freetds-bin
- unixodbc-dev

On **Debian-based systems** these can be installed with the following command:

```
sudo apt-get install freetds-bin unixodbc-dev
```

On **Redhat or CentOS systems**, these can be installed from the Extra Packages for Enterprise Linux (EPEL) repository:

```
sudo yum install https://dl.fedoraproject.org/pub/epel/epel-release-latest-8.noarch.  
↪rpm  
sudo yum install freetds unixODBC-devel
```

**Note:** The above command to install the EPEL repository is for Centos/Redhat 8. Change the number to match your OS version. EPEL packages are included in Fedora repositories, so installing EPEL is not required on Fedora.

It may be possible to deploy VOLTTTRON on a system not listed above but may involve some troubleshooting and dependency management on the part of the user.

In order to support historians, the python installation must include the built-in sqlite3 support (a compile time option). This is included in all of the linux distribution packages referenced above, which is the recommended and supported way of running python. In cases where a user needs to compile their own python (not an officially supported configuration), make sure that the sqlite3 option is enabled.

## 2.1.2 Step 2 - Clone VOLTTTRON code

### Repository Structure

There are several options for using the VOLTTTRON code depending on whether you require the most stable version of the code or want the latest updates as they happen. In order of decreasing stability and increasing currency:

- *Main* - Most stable release branch, current major release is 7.0. This branch is default.
- *develop* - contains the latest *finished* features as they are developed. When all features are stable, this branch will be merged into *Main*.

**Note:** This branch can be cloned by those wanting to work from the latest version of the platform but should not be used in deployments.

- Features are developed on “feature” branches or developers’ forks of the main repository. It is not recommended to clone these branches except for exploring a new feature.

**Note:** VOLTTTRON versions 6.0 and newer support two message buses - ZMQ and RabbitMQ.

```
git clone https://github.com/VOLTTTRON/volttron --branch <branch name>
```

## 2.1.3 Step 3 - Setup virtual environment

The *bootstrap.py* script in the VOLTTTRON root directory will create a **virtual environment** and install the package’s Python dependencies. Options exist for upgrading or rebuilding existing environments, and for adding additional dependencies for optional drivers and agents included in the repository.

**Note:** The `--help` option for *bootstrap.py* can be specified to display all available optional parameters.

### Steps for ZeroMQ

Run the following command to install all required packages:

```
cd <volttron clone directory>
python3 bootstrap.py
```

Then activate the Python virtual environment:

```
source env/bin/activate
```

Proceed to step 4.

---

**Note:** You can deactivate the environment at any time by running *deactivate*.

---

### Steps for RabbitMQ

#### Step 1 - Install Required Packages and Activate the Virtual Environment

Setting up RabbitMQ requires additional steps; but before running those steps we still need to install the required packages and activate the virtual environment just as we did in the Steps for ZeroMQ. To do so, see [Steps for ZeroMQ](#). Once finished, proceed to the next step.

#### Step 2 - Install Erlang packages

For RabbitMQ based VOLTTRON, some of the RabbitMQ specific software packages have to be installed.

#### On Debian based systems and CentOS 8

If you are running a Debian or CentOS 8 system, you can install the RabbitMQ dependencies by running the “rabbit\_dependencies.sh” script, passing in the OS name and appropriate distribution as parameters. The following are supported:

- *debian bionic* (for Ubuntu 18.04)
- *debian focal* (for Ubuntu 20.04)

Example command:

```
./scripts/rabbit_dependencies.sh debian xenial
```

#### Alternatively

You can download and install Erlang from [Erlang Solutions](#). Please include OTP/components - ssl, public\_key, asn1, and crypto. Also lock your version of Erlang using the [yum-plugin-versionlock](#).

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**Note:**

**Currently VOLTTRON only officially supports specific versions of Erlang for each operating system:**

- 1:24.1.7-1 for Debian



- 24.2-1.el8 for CentOS 8

### Step 3 - Configure hostname

Make sure that your hostname is correctly configured in `/etc/hosts`. See this [StackOverflow post](#). If you are testing with VMs make please make sure to provide unique host names for each of the VMs you are using.

The hostname should be resolvable to a valid IP when running on bridged mode. RabbitMQ checks for this during initial boot. Without this (for example, when running on a VM in NAT mode) RabbitMQ start-up would fail with the error “unable to connect to empd (port 4369) on <hostname>.”

---

**Note:** RabbitMQ startup error would show up in the VM’s syslog (`/var/log/messages`) file and not in RabbitMQ logs (`/var/log/rabbitmq/rabbitmq@hostname.log`)

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### Step 4 - Bootstrap the environment

```
cd volttron
python3 bootstrap.py --rabbitmq [optional install directory. defaults to <user_home>/
↳rabbitmq_server]
```

This will build the platform and create a virtual Python environment and dependencies for RabbitMQ. It also installs RabbitMQ server as the current user. If an install path is provided, that path should exist and the user should have write permissions. RabbitMQ will be installed under `<install_dir>/rabbitmq_server-<rmq-version>`. The rest of the documentation refers to the directory `<install_dir>/rabbitmq_server-<rmq-version>` as `$RABBITMQ_HOME`.

---

**Note:** There are many additional *options for bootstrap.py* for including dependencies, altering the environment, etc.

---

By bootstrapping the environment for RabbitMQ, an environmental variable `$RABBITMQ_HOME` is created for your convenience. Thus, you can use `$RABBITMQ_HOME` to see if the RabbitMQ server is installed by checking its status:

```
$RABBITMQ_HOME/sbin/rabbitmqctl status
```

---

**Note:** The `RABBITMQ_HOME` environment variable can be set in `~/.bashrc`. If doing so, it needs to be set to the RabbitMQ installation directory (default path is `<user_home>/rabbitmq_server/rabbitmq_server-3.9.7`)

---

```
echo 'export RABBITMQ_HOME=$HOME/rabbitmq_server/rabbitmq_server-3.9.7'|sudo tee --
↳append ~/.bashrc
source ~/.bashrc
$RABBITMQ_HOME/sbin/rabbitmqctl status
```

## Step 5 - Configure RabbitMQ setup for VOLTTRON

```
vcfg rabbitmq single [--config optional path to rabbitmq_config.yml]
```

A sample configuration file can be found in the VOLTTRON repository in **examples/configurations/rabbitmq/rabbitmq\_config.yml**. At a minimum you will need to provide the host name and a unique common-name (under certificate-data) in the configuration file.

---

**Note:** common-name must be unique and the general convention is to use *<volttron instance name>-root-ca*.

---

Running the above command without the optional configuration file parameter will cause the user to be prompted for all the required data in the command prompt. “vcfg” will use that data to generate a rabbitmq\_config.yml file in the *VOLTTRON\_HOME* directory.

---

**Note:** If the above configuration file is being used as a basis for creating your own configuration file, be sure to update it with the hostname of the deployment (this should be the fully qualified domain name of the system).

---

This script creates a new virtual host and creates SSL certificates needed for this VOLTTRON instance. These certificates get created under the subdirectory “certificates” in your VOLTTRON home (typically in *~/.volttron*). It then creates the main VIP exchange named “volttron” to route message between the platform and agents and alternate exchange to capture unroutable messages.

---

**Note:** We configure the RabbitMQ instance for a single *VOLTTRON\_HOME* and *VOLTTRON\_INSTANCE*. This script will confirm with the user the volttron\_home to be configured. The VOLTTRON instance name will be read from *volttron\_home/config* if available, if not the user will be prompted for VOLTTRON instance name. To run the scripts without any prompts, save the the VOLTTRON instance name in *volttron\_home/config* file and pass the VOLTTRON home directory as a command line argument. For example:

```
vcfg --vhome /home/vdev/.new_vhome --rabbitmq single
```

---

**Note:** The default behavior generates a certificate which is valid for a period of 1 year.

---

The Following are the example inputs for *vcfg rabbitmq single* command. Since no config file is passed the script prompts for necessary details.

```
Your VOLTTRON_HOME currently set to: /home/vdev/new_vhome2

Is this the volttron you are attempting to setup? [Y]:
Creating rmq config yml
RabbitMQ server home: [/home/vdev/rabbitmq_server/rabbitmq_server-3.9.7]:
Fully qualified domain name of the system: [cs_cbox.pnl.gov]:

Enable SSL Authentication: [Y]:

Please enter the following details for root CA certificates
Country: [US]:
State: Washington
Location: Richland
Organization: PNNL
```

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```

Organization Unit: Volttron-Team
Common Name: [volttron1-root-ca]:
Do you want to use default values for RabbitMQ home, ports, and virtual host: [Y]: N
Name of the virtual host under which RabbitMQ VOLTRON will be running: [volttron]:
AMQP port for RabbitMQ: [5672]:
http port for the RabbitMQ management plugin: [15672]:
AMQPS (SSL) port RabbitMQ address: [5671]:
https port for the RabbitMQ management plugin: [15671]:
INFO:rmq_setup.pyc:Starting rabbitmq server
Warning: PID file not written; -detached was passed.
INFO:rmq_setup.pyc:**Started rmq server at /home/vdev/rabbitmq_server/rabbitmq_server-
↳3.9.7
INFO:requests.packages.urllib3.connectionpool:Starting new HTTP connection (1):_
↳localhost
INFO:requests.packages.urllib3.connectionpool:Starting new HTTP connection (1):_
↳localhost
INFO:requests.packages.urllib3.connectionpool:Starting new HTTP connection (1):_
↳localhost
INFO:rmq_setup.pyc:
Checking for CA certificate

INFO:rmq_setup.pyc:
Root CA (/home/vdev/new_vhome2/certificates/certs/volttron1-root-ca.crt) NOT Found._
↳Creating root ca for volttron instance
Created CA cert
INFO:requests.packages.urllib3.connectionpool:Starting new HTTP connection (1):_
↳localhost
INFO:requests.packages.urllib3.connectionpool:Starting new HTTP connection (1):_
↳localhost
INFO:rmq_setup.pyc:**Stopped rmq server
Warning: PID file not written; -detached was passed.
INFO:rmq_setup.pyc:**Started rmq server at /home/vdev/rabbitmq_server/rabbitmq_server-
↳3.9.7
INFO:rmq_setup.pyc:

#####

Setup complete for volttron home /home/vdev/new_vhome2 with instance name=volttron1
Notes:

- Please set environment variable `VOLTTRON_HOME` to `/home/vdev/new_vhome2` before_
↳starting volttron

- On production environments, restrict write access to
  /home/vdev/new_vhome2/certificates/certs/volttron1-root-ca.crt to only admin user.
↳ For example: sudo chown root /home/vdev/new_vhome2/certificates/certs/volttron1-
↳root-ca.crt

- A new admin user was created with user name: volttron1-admin and password=default_
↳passwd.
  You could change this user's password by logging into <https://cs_cbox.pnl.
↳gov:15671/> Please update /home/vdev/new_vhome2/rabbitmq_config.yml if you change_
↳password

#####

```

## 2.1.4 Test the VOLTTRON Deployment

We are now ready to start VOLTTRON instance. If configured with RabbitMQ message bus a config file would have been generated in `$VOLTTRON_HOME/config` with the entry `message-bus=rmq`. If you need to revert back to ZeroMQ based VOLTTRON, you will have to either remove the `message-bus` parameter or set it to the default “`zmq`” in `$VOLTTRON_HOME/config`.

The following command starts `volttron` process in the background:

```
volttron -vv -l volttron.log&
```

This enters the virtual Python environment and then starts the platform in debug (`vv`) mode with a log file named `volttron.log`. Alternatively you can use the utility script `start-volttron` script that does the same.

```
./start-volttron
```

To stop the platform, use the `vct` command:

```
volttron-ctl shutdown --platform
```

or use the included `stop-volttron` script:

```
./stop-volttron
```

**Warning:** If you plan on running VOLTTRON in the background and detaching it from the terminal with the `disown` command be sure to redirect `stderr` and `stdout` to `/dev/null`. Some libraries which VOLTTRON relies on output directly to `stdout` and `stderr`. This will cause problems if those file descriptors are not redirected to `/dev/null`

```
#To start the platform in the background and redirect stderr and stdout
#to /dev/null
volttron -vv -l volttron.log > /dev/null 2>&1&
```

## Installing and Running Agents

VOLTTRON platform comes with several built in services and example agents out of the box. To install a agent use the script `install-agent.py`

```
python scripts/install-agent.py -s <top most folder of the agent> [-c <config file.>
↳ Might be optional for some agents>]
```

For example, we can use the command to install and start the Listener Agent - a simple agent that periodically publishes heartbeat message and listens to everything on the message bus. Install and start the Listener agent using the following command:

```
python scripts/install-agent.py -s examples/ListenerAgent --start
```

Check `volttron.log` to ensure that the listener agent is publishing heartbeat messages.

```
tail volttron.log
```

```
2016-10-17 18:17:52,245 (listeneragent-3.2 11367) listener.agent INFO: Peer: 'pubsub',
↳ Sender: 'listeneragent-3.2_1':, Bus: u'', Topic: 'heartbeat/listeneragent-3.2_1',
↳ Headers: {'Date': '2016-10-18T01:17:52.239724+00:00', 'max_compatible_version': u'',
↳ 'min_compatible_version': '3.0'}, Message: {'status': 'GOOD', 'last_updated':
↳ '2016-10-18T01:17:47.232972+00:00', 'context': 'hello'}
```

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You can also use the `volttron-ctl` (or `vctl`) command to start, stop or check the status of an agent

```
(volttron)volttron@volttron1:~/git/rmq_volttron$ vctl status
```

AGENT	IDENTITY	TAG	STATUS	HEALTH
6 listeneragent-3.2	listeneragent-3.2_1		running [13125]	GOOD
f platform_driveragent-3.2	platform.driver	platform_driver		

```
vctl stop <agent id>
```

**Note:** The default working directory is `~/volttron`. The default directory for creation of agent packages is `~/volttron/packages`

## 2.1.5 Next Steps

There are several walk-throughs and detailed explanations of platform features to explore additional aspects of the platform:

- *Agent Framework*
- *Driver Framework*
- Demonstration of the *management UI*
- *RabbitMQ setup* with Federation and Shovel plugins

## 2.2 Definition of Terms

This page lays out a common terminology for discussing the components and underlying technologies used by the platform. The first section discusses capabilities and industry standards that VOLTTRON conforms to while the latter is specific to the VOLTTRON domain.

### 2.2.1 Industry Terms

**Agent** Software which acts on behalf of a user to perform a set of tasks.

**BACNet** Building Automation and Control network that leverages ASHRAE, ANSI, and IOS 16484-5 standard protocols

**DNP3 (Distributed Network Protocol 3)** Communications protocol used to coordinate processes in distributed automation systems

**JSON (JavaScript Object Notation)** JavaScript object notation is a text-based, human-readable, open data interchange format, similar to XML but less verbose

**IEEE 2030.5** Utilities communication standard for managing energy demand and load (previously Smart Energy Profile version 2, SEP2)

**JSON-RPC (JSON-Remote Procedure Call)** JSON-encoded Remote Procedure Call

**Modbus** Communications protocol for talking with industrial electronic devices

**PLC (Programmable Logic Controller)** Computer used in industrial applications to manage processes of groups of industrial devices

**Python Virtual Environment** The *Python-VE* library allows users to create a virtualized copy of the local environment. A virtual environment allows the user to isolate the dependencies for a project which helps prevent conflicts between dependencies across projects.

**Publish/Subscribe** A message delivery pattern where senders (publishers) and receivers (subscribers) do not communicate directly nor necessarily have knowledge of each other, but instead exchange messages through an intermediary based on a mutual class or topic.

---

**Note:** The Publish/Subscribe paradigm is often notated as `pub/sub` in VOLTTRON documentation.

---

**RabbitMQ** Open-Source message brokering system used by VOLTTRON for sending messages between services on the platform.

**Remote Procedure Call** Protocol used to request services of another computer located elsewhere on the network or on a different network.

**SSH** *Secure Shell* is a network protocol providing encryption and authentication of data using public-key cryptography.

**SSL** *Secure Sockets Layer* is a technology for encryption and authentication of network traffic based on a chain of trust.

**TLS** *Transport Layer Security* is the successor to SSL.

**ZeroMQ** (also ØMQ) A library used for inter-process and inter-computer communication.

### 2.2.2 VOLTTRON Terms

**Activated Environment** An activated environment is the environment a VOLTTRON instance is run in. The bootstrap process creates the environment from the shell.

**AIP (Agent Instantiation and Packaging)** This is the module responsible for creating agent wheels, the agent execution environment and running agents. Found in the VOLTTRON repository in the *volttron/platform* directory.

**Agent Framework** Framework which provides connectivity to the VOLTTRON platform and subsystems for software agents.

**Bootstrap the Environment** The process by which an operating environment (activated environment) is produced. From the *VOLTTRON\_ROOT* directory, executing *python bootstrap.py* will start the bootstrap process.

**Config Store** Agent data store used by the platform for storing configuration files and automating the management of agent configuration

**Driver** Module that implements communication paradigms of a device to provide an interface to devices for the VOLTTRON platform.

**Driver Framework** Framework for implementing communication between the VOLTTRON platform and devices on the network (or a remote network)

**Historian** Historians in VOLTTRON are special purpose agents for automatically collecting data from the platform message bus and storing in a persistent data store.

**VIP** VOLTTRON Interconnect Protocol is a secure routing protocol that facilitates communications between agents, controllers, services, and the supervisory *VOLTTRON\_INSTANCE*.

**VIP address** Public address bound to by a VOLTRON platform instance for communication (Example: `tcp://192.168.1.20:22916`). Communication to external platform instances requires that the address be in range for external communication from the host.

**VIP Identity** Unique identifier for an agent connected to an instance. Used for messaging, routing and security.

**VOLTRON Central** VOLTRON Central (VC) is a special purpose agent for managing multiple platforms in a distributed VOLTRON deployment

**VOLTRON\_HOME** The location for a specific *VOLTRON\_INSTANCE* to store its specific information. There can be many *VOLTRON\_HOME*'s on a single computing resource such as a VM, machine, etc. Each *VOLTRON\_HOME* will correspond to a single instance of VOLTRON.

**VOLTRON\_INSTANCE** A single VOLTRON process executing instructions on a computing resource. For each *VOLTRON\_INSTANCE*, there WILL BE only one *VOLTRON\_HOME* associated with it. For a *VOLTRON\_INSTANCE* to participate outside its computing resource, it must be bound to an external IP address.

**VOLTRON\_ROOT** The cloned directory from Github. When executing the command:

```
git clone https://github.com/VOLTRON/voltron.git
```

the top level voltron folder is the VOLTRON\_ROOT.

**Web Framework** Framework used by VOLTRON agents to implement web services with HTTP and HTTPS

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## 2.4 Message Bus

The VOLTTRON message bus is the mechanism responsible for enabling communication between agents, drivers, and platform instances. The message bus supports communication using the *Publish/Subscribe Paradigm* and *JSON RPC*. Currently VOLTTRON may be configured to use either Zero MQ or RabbitMQ messaging software to perform messaging.

To standardize message bus communication, VOLTTRON implements VIP - VOLTTRON Interconnect Protocol. VIP defines patterns for pub/sub communication as well as JSON-RPC, and allows for the creation of agent communication subsystems.

For more information on messaging, VIP, multi-platform communication and more, please explore the message bus documentation linked below:

### 2.4.1 Messaging and Topics

#### Introduction

Agents in VOLTTRON™ communicate with each other using a publish/subscribe mechanism built on the Zero MQ or RabbitMQ Python libraries. This allows for great flexibility as topics can be created dynamically and the messages sent can be any format as long as the sender and receiver understand it. An agent with data to share publishes to a topic, then any agents interested in that data subscribe to that topic.

While this flexibility is powerful, it also could also lead to confusion if some standard is not followed. The current conventions for communicating in the VOLTTRON are:

- Topics and subtopics follow the format: `topic/subtopic/subtopic`
- Subscribers can subscribe to any and all levels. Subscriptions to `topic` will include messages for the base topic and all subtopics. Subscriptions to `topic/subtopic1` will only receive messages for that subtopic and any children subtopics. Subscriptions to empty string (“”) will receive ALL messages. This is not recommended.

Agents should set the *From* header. This will allow agents to filter on the *To* message sent back.

#### Topics

##### In VOLTTRON

- **alerts** - Base topic for alerts published by agents and subsystems, such as agent health alerts
- **analysis** - Base topic for analytics being used with building data
- **config** - Base topic for managing agent configuration
- **devices** - Base topic for data being published by drivers
- **datalogger** - Base topic for agents wishing to record time series data
- **heartbeat** - Topic for publishing periodic “heartbeat” or “keep-alive”
- **market** - Base topics for market agent communication
- **record** - Base topic for agents to record data in an arbitrary format
- **weather** - Base topic for polling publishes of weather service agents



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**Note:** Other more specific topics may exist for specific agents or purposes. Please review the documentation for the specific feature for more information.

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## Controller Agent Topics

See the documentation for the *Actuator Agent*.

## 2.4.2 VOLTTTRON™ Interconnect Protocol

This document specifies VIP, the VOLTTTRON™ Interconnect Protocol. The use case for VIP is to provide communications between *agents*, *controllers*, *services*, and the supervisory *platform* in an abstract fashion so that additional protocols can be built and used above VIP. VIP defines how *peers* connect to the *router* and the messages they exchange.

- Name: [github.com/VOLTTTRON/voltttron/wiki/VOLTTTRON-Interconnect-Protocol](https://github.com/VOLTTTRON/voltttron/wiki/VOLTTTRON-Interconnect-Protocol)
- Editor: Brandon Carpenter <brandon (dot) carpenter (at) pnnl (dot) gov>
- State: draft
- See also: [ZeroMQ](#), [ZMQTP](#), [CurveZMQ](#), [ZAP](#)

## Remote Procedure Calls

Remote procedure calls (RPC) is a feature of VOLTTTRON Interconnect Protocol *VIP*. VIP includes the ability to create new point-to-point protocols, called subsystems, enabling the implementation of [JSON-RPC 2.0](#). This provides a simple method for agent authors to write methods and expose or export them to other agents, making request-reply or notify communications patterns as simple as writing and calling methods.

## Exporting Methods

The `export()` method, defined on the RPC subsystem class, is used to mark a method as remotely accessible. This `export()` method has a dual use:

- The class method can be used as a decorator to statically mark methods when the agent class is defined.
- The instance method dynamically exports methods, and can be used with methods not defined on the agent class.

Each take an optional export name argument, which defaults to the method name. Here are the two export method signatures:

Instance method:

```
RPC.export(method, name=None)
```

Class method:

```
RPC.export(name=None)
```

And here is an example agent definition using both methods:

```
from volttron.platform.vip import Agent, Core, RPC

def add(a, b):
    '''Add two numbers and return the result'''
    return a + b

class ExampleAgent(Agent):
    @RPC.export
    def say_hello(self, name):
        '''Build and return a hello string'''
        return 'Hello, %s!' % (name,)

    @RPC.export('say_bye')
    def bye(self, name):
        '''Build and return a goodbye string'''
        return 'Goodbye, %s.' % (name,)

    @Core.receiver('setup')
    def onsetup(self, sender, **kwargs):
        self.vip.rpc.export('add')
```

## Calling exported methods

The RPC subsystem provides three methods for calling exported RPC methods:

```
RPC.call(peer, method, *args, **kwargs)
```

Call the remote method exported by *peer* with the given arguments. Returns a *gevent AsyncResult* object.

```
RPC.batch(peer, requests)
```

Batch call remote methods exported by *peer*. *requests* must be an iterable of 4-tuples (*notify*, *method*, *args*, *kwargs*), where *notify* is a boolean indicating whether this is a notification or standard call, *method* is the method name, *args* is a list and *kwargs* is a dictionary. Returns a list of *AsyncResult* objects for any standard calls. Returns None if all requests were notifications.

```
RPC.notify(peer, method, *args, **kwargs)
```

Send a one-way notification message to *peer* by calling *method* without returning a result.

Here are some examples:

```
self.vip.rpc.call(peer, 'say_hello', 'Bob').get()
results = self.vip.rpc.batch(peer, [(False, 'say_bye', 'Alice', {}), (True, 'later',
→ [], {})])
self.vip.rpc.notify(peer, 'ready')
```

## Inspection

A list of methods is available by calling the *inspect* method. Additional information can be returned for any method by appending *.inspect* to the method name. Here are a couple examples:

```
self.vip.rpc.call(peer, 'inspect')    # Returns a list of exported methods
self.vip.rpc.call(peer, 'say_hello.inspect')  # Return metadata on say_hello method
```

## VCTL RPC Commands

There are two rpc subcommands available through vctl, *list* and *code*.

The list subcommand displays all of the agents that have a peer connection to the instance and which methods are available from each of these agents.

```
vctl rpc list
  config.store
    delete_config
    get_configs
    manage_delete_config
    manage_delete_store
    manage_get
    manage_get_metadata
    manage_list_configs
    manage_list_stores
    manage_store
    set_config
  .
  .
  .

  platform.historian
    get_aggregate_topics
    get_topic_list
    get_topics_by_pattern
    get_topics_metadata
    get_version
    insert
    query
  volttron.central
    get_publickey
    is_registered
```

If a single agent is specified, it will list all methods available for that agent.

```
vctl rpc list platform.historian
  platform.historian
    get_aggregate_topics
    get_topic_list
    get_topics_by_pattern
    get_topics_metadata
    get_version
    insert
    query
```

If the *-v* option is selected, all agent subsystem rpc methods will be displayed for each selected agent as well.

```
vctl rpc list -v platform.historian
platform.historian
    get_aggregate_topics
    get_topic_list
    get_topics_by_pattern
    get_topics_metadata
    get_version
    insert
    query
    agent.version
    health.set_status
    health.get_status
    health.get_status_json
    health.send_alert
    heartbeat.start
    heartbeat.start_with_period
    heartbeat.stop
    heartbeat.restart
    heartbeat.set_period
    config.update
    config.initial_update
    auth.update
```

If an agent is specified, and then a method (or methods) are specified, all parameters associated with the method(s) will be output.

```
vctl rpc list platform.historian get_version query
platform.historian
    get_version
    Parameters:
    query
    Parameters:
        topic:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        start:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        end:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        agg_type:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        agg_period:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        skip:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': 0}
        count:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': None}
        order:
            {'kind': 'POSITIONAL_OR_KEYWORD', 'default': 'FIRST_TO_LAST'}
```

By adding the ‘-v’ option to this stage, the doc-string description of the method will be displayed along with the method and parameters if available.

```
vctl rpc list -v platform.historian get_version
platform.historian
    get_version
    Documentation:
        RPC call to get the version of the historian
```

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```

        :return: version number of the historian used
        :rtype: string

Parameters:

vctl rpc code
vctl rpc list <peer identity>
vctl rpc list <peer identity> <method>
vctl rpc list -v <peer identity>
vctl rpc list -v <peer identity> <method>
vctl rpc code -v
vctl rpc code <peer identity>
vctl rpc code <peer identity> <method>

```

The code subcommand functions similarly to list, except that it will output the code to be used in an agent when writing an rpc call. Any available parameters are included as a list in the line of code where the parameters will need to be provided. These will need to be modified based on the use case.

```

vctl rpc code
    self.vip.rpc.call(config.store, delete_config, ['config_name', 'trigger_callback',
↪ 'send_update']).get()
    self.vip.rpc.call(config.store, get_configs).get()
    self.vip.rpc.call(config.store, manage_delete_config, ['args', 'kwargs']).get()
    self.vip.rpc.call(config.store, manage_delete_store, ['args', 'kwargs']).get()
    self.vip.rpc.call(config.store, manage_get, ['identity', 'config_name', 'raw']).
↪ get()
    self.vip.rpc.call(config.store, manage_get_metadata, ['identity', 'config_name']).
↪ get()
    self.vip.rpc.call(config.store, manage_list_configs, ['identity']).get()
    self.vip.rpc.call(config.store, manage_list_stores).get()
    self.vip.rpc.call(config.store, manage_store, ['args', 'kwargs']).get()
    self.vip.rpc.call(config.store, set_config, ['config_name', 'contents', 'trigger_
↪ callback', 'send_update']).get()
    .
    .
    .
    self.vip.rpc.call(platform.historian, get_aggregate_topics).get()
    self.vip.rpc.call(platform.historian, get_topic_list).get()
    self.vip.rpc.call(platform.historian, get_topics_by_pattern, ['topic_pattern']).
↪ get()
    self.vip.rpc.call(platform.historian, get_topics_metadata, ['topics']).get()
    self.vip.rpc.call(platform.historian, get_version).get()
    self.vip.rpc.call(platform.historian, insert, ['records']).get()
    self.vip.rpc.call(platform.historian, query, ['topic', 'start', 'end', 'agg_type',
↪ 'agg_period', 'skip', 'count', 'order']).get()
    self.vip.rpc.call(volttron.central, get_publickey).get()
    self.vip.rpc.call(volttron.central, is_registered, ['address_hash', 'address']).
↪ get()

```

As with rpc list, the code subcommand can be filtered based on the :term`VIP identity` and/or the method(s).

```

vctl rpc code platform.historian
    self.vip.rpc.call(platform.historian, get_aggregate_topics).get()
    self.vip.rpc.call(platform.historian, get_topic_list).get()
    self.vip.rpc.call(platform.historian, get_topics_by_pattern, ['topic_pattern']).
↪ get()

```

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```
self.vip.rpc.call(platform.historian, get_topics_metadata, ['topics']).get()
self.vip.rpc.call(platform.historian, get_version).get()
self.vip.rpc.call(platform.historian, insert, ['records']).get()
self.vip.rpc.call(platform.historian, query, ['topic', 'start', 'end', 'agg_type',
↪ 'agg_period', 'skip', 'count', 'order']).get()
```

```
vctl rpc code platform.historian query
    self.vip.rpc.call(platform.historian, query, ['topic', 'start', 'end', 'agg_type',
↪ 'agg_period', 'skip', 'count', 'order']).get()
```

## Implementation

See the [RPC module](#) for implementation details.

Also see *Multi-Platform RPC Communication* and *RPC in RabbitMQ* for additional resources.

## VIP Known Identities

It is critical for systems to have known locations for receiving resources and services from in a networked environment. The following table details the vip identities that are reserved for VOLTTRON specific usage.

Table 1: Known Identities

VIP Identity	Agent/Feature	Notes
platform		
plat-form.agent	Platform Agent	Used to allow the VolttronCentralAgent to control and individual platform
plat-form.auth	Platform Auth	The identity of VolttronCentralAgent
volt-tron.central	VOLT-TRON Central	The identity of VolttronCentralAgent
plat-form.historian	User-Selected Historian	An individual platform may have many historians available to it, however this is one available through Volttron Central. Note that this does not require a specific type of historian, just that it's <i>VIP Identity</i>
plat-form.topic_watcher	Topic Watcher	Agent which publishes alerts for topics based on timing thresholds
plat-form.sysmon	Sysmon	Agent which publishes System Monitoring statistics
plat-form.emailer	Emailer	Agent used by other agents on the platform to send email notifications
plat-form.health	Platform Health	Agent health service
plat-form.market	Market Services	The default identity for Market Service agents
control	Platform Control	Control service facilitates the starting, stopping, removal, and installation of the agents on an instance. This agent is executing within the main volttron process
control.connection	Platform Control	Short lived identity used by all of the volttron-ctl ( <i>vctl</i> ) commands
pubsub	Pub/Sub Router	Pub/Sub subsystem router. Allows backward compatibility with version 4.1
plat-form_web	Platform Web Service	Facilitates HTTP/HTTPS requests from browsers and routes them to the corresponding agent for processing (will be renamed to platform.web in future update)
keydiscovery	Server Key Discovery	Agent that enables discovery of server keys of remote platforms in a multi-platform setup
plat-form.actuator	Actuator	Agent which coordinates sending control commands to devices
con-fig.store	Configuration Store	The configuration subsystem service agent on the platform. Includes scheduling
plat-form.driver	Platform Driver	The default identity for the Platform Driver Agent (will be renamed Platform Driver Agent) which is responsible for coordinating device communication
zmq.proxy.router	Zero MQ Proxy	ZeroMQ's proxy service for Pub/Sub subsystem router. Allows backward compatibility between rmq and zmq instances of VOLTTRON

## VIP Authentication

*VIP* (VOLTTRON Interconnect Protocol) authentication is implemented in the `auth` module and extends the ZeroMQ Authentication Protocol *ZAP* to VIP by including the ZAP User-Id in the VIP payload, thus allowing peers to authorize access based on ZAP credentials. This document does not cover ZAP in any detail, but its understanding is fundamental to securely configuring ZeroMQ. While this document will attempt to instruct on securely configuring VOLTTRON for use on the Internet, it is recommended that the ZAP documentation also be consulted.

## Default Encryption

By default, ZeroMQ operates in plain-text mode, without any sort of encryption. While this is okay for in-process and interprocess communications, via UNIX domain sockets, it is insecure for any kind of inter-network communications, especially when traffic must traverse the Internet. Therefore, VOLTTRON automatically generates an encryption key and enables *CurveMQ* by default on all TCP connections.

To see VOLTTRON's public key run the `vctl auth serverkey` command. For example:

```
(volttron)[user@home]$ volttron-ctl auth serverkey
FSG7LHhy3v8tdNz3gK35G6-oxUcylN54pYRKu5fBJzU
```

## Authentication Implementation

Authentication is handled on the server and client sides. The server authentication handles the setup and monitoring of incoming connection authentication. This verifies that the authentication method matches the appropriate auth protocol that has been implemented. The client authentication creates a connection address that contains all the necessary authentication meta data to allow an agent to connect to a server. While the default authentication implementation is for Zap ZMQ, it is possible to develop new authentication client and server designs. The server implementation is handled by the auth service, and client authentication is handled by the agent core.

Client Authentication: `* create_authenticated_address`

Server Authentication: `* setup_authentication * handle_authentication * stop_authentication * unbind_authentication`

## Peer Authentication

ZAP defines a method for verifying credentials exchanged when a connection is initially established. The authentication mechanism provides three main pieces of information useful for authentication:

- **domain:** a name assigned to a locally bound address (to which peers connect)
- **address:** the remote address of the peer
- **credentials:** includes the authentication method and any associated credentials

During authentication, VOLTTRON checks these pieces against a list of accepted peers defined in a file, called the “auth file” in this document. This JSON-formatted file is located at `$VOLTTRON_HOME/auth.json` and must have a matching entry in the allow list for remote connections to be accepted.

The auth file should not be modified directly. To change the auth file, use `vctl auth` subcommands: `add`, `list`, `remove`, and `update`. (Run `vctl auth --help` for more details and see the [authentication commands documentation](#).)

Here are some example entries:



```
(volttron)[user@home]$ vctl auth list

INDEX: 0
{
  "domain": null,
  "user_id": "platform",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": [],
  "groups": [],
  "address": null,
  "credentials": "k1C9-FPRAVjL-cHliQqAJaCHUNVXaAlkVc7EqK0u9mI",
  "comments": "Automatically added by platform on start"
}

INDEX: 2
{
  "domain": null,
  "user_id": "platform.sysmon",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": [],
  "groups": [],
  "address": null,
  "credentials": "5UD_GTk5dM2g4pk8dl-wM-BYgt4RAKiHf4SnT_YU6jY",
  "comments": "Automatically added on agent install"
}
```

**Note:** If using regular expressions in the “address” portion, denote this with “/”. Backslashes must be escaped “\”.

This is a valid regular expression: `"/192\\.168\\.1\\.\\..*/"`

These are invalid: `"/192\\.168\\.1\\.\\..*/"`, `"/192\\.168\\.1\\.\\..*"`, `"192\\.168\\.1\\.\\..*"`

When authenticating, the credentials are checked. If they don’t exist or don’t match, authentication fails. Otherwise, if domain and address are not present (or are null), authentication succeeds. If address and/or domain exist, they must match as well for authentication to succeed.

*CURVE* credentials include the remote peer’s public key. Watching the **INFO** level log output of the auth module can help determine the required values for a specific peer.

## Configuring Agents

A remote agent must know the platform's public key (also called the server key) to successfully authenticate. This server key can be passed to the agent's `__init__` method in the `serverkey` parameter, but in most scenarios it is preferable to add the server key to the *known-hosts file*.

## URL-style Parameters

VOLTTRON extends ZeroMQ's address scheme by supporting URL-style parameters for configuration. The following parameters are supported when connecting:

- `serverkey`: encoded public key of remote server
- `secretkey`: agent's own private/secret key
- `publickey`: agent's own public key
- `ipv6`: instructs ZeroMQ to attempt to use IPv6

**Note:** Although these parameters are still supported they should rarely need to be specified in the VIP-address URL. Agent *key stores* and the *known-hosts file* are automatically used when possible.

## Platform Configuration

By default, the platform only listens on the local IPC VIP socket. Additional addresses may be bound using the `--vip-address` option, which can be provided multiple times to bind multiple addresses. Each *VIP address* should follow the standard ZeroMQ convention of prefixing with the socket type (`ipc://` or `tcp://`) and may include any of the following additional URL parameters:

- `domain`: domain name to associate with this endpoint (defaults to "vip")
- `secretkey`: alternate private/secret key (defaults to generated key for `tcp://`)
- `ipv6`: instructs ZeroMQ to attempt to use IPv6

## Example Setup

Suppose agent A needs to connect to a remote platform B. First, agent A must know platform B's public key (the *server key*) and platform B's IP address (including port). Also, platform B needs to know agent A's public key (let's say it is `HOVXfTspZWcpHQcYT_xGcqypBHzQHTgqEzVb4iXrcDg`).

Given these values, a user on agent A's platform adds platform B's information to the *known-hosts file*.

At this point agent A has all the information needed to connect to platform B, but platform B still needs to add an authentication entry for agent A.

If agent A tried to connect to platform B at this point both parties would see an error. Agent A would see an error similar to:

```
No response to hello message after 10 seconds.
A common reason for this is a conflicting VIP IDENTITY.
Shutting down agent.
```

Platform B (if started with `-v` or `-vv`) will show an error:

```
2016-10-19 14:21:20,934 () volttron.platform.auth INFO: authentication failure:
↪ domain='vip', address='127.0.0.1', mechanism='CURVE', credentials=[
↪ 'HOVXfTspZWcpHQcYT_xGcqypBHzQHTgqEzVb4iXrcDg']
```

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Agent A failed to authenticat to platform B because the platform didn't have agent A's public in the authentication list.

To add agent A's public key, a user on platform B runs:

```
(volttron)[user@platform-b]$ volttron-ctl auth add
domain []:
address []:
user_id []: Agent-A
capabilities (delimit multiple entries with comma) []:
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []: HOVXfTspZWcpHQcYT_xGcqypBHqQHTgqEzVb4iXrcDg
comments []:
enabled [True]:
```

Now if agent A can successfully connect to platform B, and platform B's log will show:

```
2016-10-19 14:26:16,446 () volttron.platform.auth INFO: authentication success:
↪ domain='vip', address='127.0.0.1', mechanism='CURVE', credentials=[
↪ 'HOVXfTspZWcpHQcYT_xGcqypBHqQHTgqEzVb4iXrcDg'], user_id='Agent-A'
```

For a more details see the [authentication walk-through](#).

## VIP Authorization

VIP [authentication](#) and authorization go hand in hand. When an agent authenticates to a VOLTTRON platform that agent proves its identity to the platform. Once authenticated, an agent is allowed to connect to the [message bus](#). VIP authorization is about giving a platform owner the ability to limit the capabilities of authenticated agents.

## Authorization Implementation

Authorization has client and server implementations. On the client side, authorization is used to connect the auth subsystem to the auth service. This provides the connection needed to manage capabilities and protected topics. The server authorization is used to manage pending credentials and certificates that are handled by authentication, as well as managing capabilities and protected topics.

BaseServerAuthorization: \* approve\_authorization \* deny\_authorization \* delete\_authorization \* get\_authorization \* get\_authorization\_status \* get\_pending\_authorizations \* get\_approved\_authorizations \* get\_denied\_authorizations \* update\_user\_capabilities \* load\_protected\_topics \* update\_protected\_topics

BaseClientAuthorization \* connect\_remote\_platform

There are two parts to authorization:

1. Required capabilities (specified in agent's code)
2. Authorization entries (specified via `volttron-ctl auth` commands)

The following example will walk through how to specify required capabilities and grant those capabilities in authorization entries.

## Single Capability

For this example suppose there is a temperature agent that can read and set the temperature of a particular room. The agent author anticipates that building managers will want to limit which agents can set the temperature.

In the temperature agent, a required capability is specified by using the `RPC.allow` decorator:

```
@RPC.export
def get_temperature():
    ...

@RPC.allow('CAP_SET_TEMP')
@RPC.export
def set_temperature(temp):
    ...
```

In the code above, any agent can call the `get_temperature` method, but only agents with the `CAP_SET_TEMP` capability can call `set_temperature`.

---

**Note:** Capabilities are arbitrary strings. This example follows the general style used for Linux capabilities, but it is up to the agent author.

---

Now that a required capability has been specified, suppose a VOLTTRON platform owner wants to allow a specific agent, say *Alice Agent*, to set the temperature.

The platform owner runs `vctl auth add` to add new authorization entries or `vctl auth update` to update an existing entry. If *Alice Agent* is installed on the platform, then it already has an authorization entry. Running `vctl auth list` shows the existing entries:

```
...
INDEX: 3
{
  "domain": null,
  "user_id": "AliceAgent",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": [],
  "groups": [],
  "address": null,
  "credentials": "JydrFRRv-kdSejL6Ldxy978pOf8HkWC9fRHUWKmJfxc",
  "comments": null
}
...
```

Currently *AliceAgent* cannot set the temperature because it does not have the `CAP_SET_TEMP` capability. To grant this capability the platform owner runs `vctl auth update 3`:

```
(For any field type "clear" to clear the value.)
domain []:
address []:
user_id [AliceAgent]:
capabilities (delimit multiple entries with comma) []: CAP_SET_TEMP
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
```

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```
credentials [JydrFRRv-kdSejL6Ldxy978pOf8HkWC9fRHUWKmJfxc]:
comments []:
enabled [True]:
updated entry at index 3
```

Now *Alice Agent* can call `set_temperature` via RPC. If other agents try to call that method they will get the following exception:

```
error: method "set_temperature" requires capabilities set(['CAP_SET_TEMP']),
but capability list [] was provided
```

## Multiple Capabilities

Expanding on the temperature-agent example, the `set_temperature` method can require agents to have multiple capabilities:

```
@RPC.allow(['CAP_SET_TEMP', 'CAP_FOO_BAR'])
@RPC.export
def set_temperature():
    ...
```

This requires an agent to have both the `CAP_SET_TEMP` and the `CAP_FOO_BAR` capabilities. Multiple capabilities can also be specified by using multiple `RPC.allow` decorators:

```
@RPC.allow('CAP_SET_TEMP')
@RPC.allow('CAP_FOO_BAR')
@RPC.export
def temperature():
    ...
```

## Capability with parameter restriction

Capabilities can also be used to restrict access to a rpc method only with certain parameter values. For example, if *Agent A* exposes a method `bar` which accepts parameter `x`.

*Agent A*'s capability enabled exported RPC method:

```
@RPC.export
@RPC.allow('can_call_bar')
def bar(self, x):
    return 'If you can see this, then you have the required capabilities'
```

You can restrict access to *Agent A*'s `bar` method to *Agent B* with `x=1`. To add this auth entry use the `vctl auth` add command as show below:

```
vctl auth add --capabilities '{"test1_cap2":{"x":1}}' --user_id AgentB --credential_
↪vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0
```

The `auth.json` file entry for the above command would be:

```
{
  "domain": null,
  "user_id": "AgentB",
```

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```

"roles": [],
"enabled": true,
"mechanism": "CURVE",
"capabilities": {
  "test1_cap2": {
    "x": 1
  }
},
"groups": [],
"address": null,
"credentials": "vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0",
"comments": null
}

```

Parameter values can also be regular expressions:

```

(volttron)volttron@volttron1:~/git/myvolttron$ vctl auth add
domain []:
address []:
user_id []:
capabilities (delimit multiple entries with comma) []: {'test1_cap2':{'x':'/*'}}
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []: vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0
comments []:
enabled [True]:
added entry domain=None, address=None, mechanism='CURVE', credentials=u
↳ 'vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0', user_id='b22e041d-ec21-4f78-b32e-
↳ ab7138c22373'

```

The auth.json file entry for the above command would be:

```

{
  "domain": null,
  "user_id": "90f8ef35-4407-49d8-8863-4220e95974c7",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": {
    "test1_cap2": {
      "x": "/*"
    }
  },
  "groups": [],
  "address": null,
  "credentials": "vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0",
  "comments": null
}

```

## Protecting Pub/Sub Topics

VIP *authorization* enables VOLTRON platform owners to protect pub/sub topics. More specifically, a platform owner can limit who can publish to a given topic. This protects subscribers on that platform from receiving messages (on the protected topic) from unauthorized agents.

### Example

To protect a topic, add the topic name to `$VOLTRON_HOME/protected_topics.json`. For example, the following protected-topics file declares that the topic `foo` is protected:

```
{
  "write-protect": [
    {"topic": "foo", "capabilities": ["can_publish_to_foo"]}
  ]
}
```

**Note:** The capability name `can_publish_to_foo` is not special; It can be any string, but it is easier to manage capabilities with meaningful names.

Now only agents with the capability `can_publish_to_foo` can publish to the topic `foo`. To add this capability to authenticated agents, run `vctl auth update` (or `volttron-ctl auth add` for new authentication entries), and enter `can_publish_to_foo` in the capabilities field:

```
capabilities (delimit multiple entries with comma) []: can_publish_to_foo
```

Agents that have the `can_publish_to_foo` capabilities can publish to topic `foo`. That is, such agents can call:

```
self.vip.pubsub.publish('pubsub', 'foo', message='Here is a message')
```

If unauthorized agents try to publish to topic `foo` they will get an exception:

```
to publish to topic "foo" requires capabilities ['can_publish_to_foo'], but
↪capability list [] was provided
```

## Regular Expressions

Topic names in `$VOLTRON_HOME/protected_topics.json` can be specified as regular expressions. In order to use a regular expression, the topic name must begin and end with a `/`. For example:

```
{
  "write-protect": [
    {"topic": "/foo/.*./", "capabilities": ["can_publish_to_foo"]}
  ]
}
```

This protects topics such as `foo/bar` and `foo/anything`.

### VIP Enhancements

When creating VIP for VOLTTRON 3.0 we wanted to address two security concerns and one user request:

- Security Concern 1: Agents can spoof each other on the VOLTTRON message bus and fake messages.
- Security Concern 2: Agents can subscribe to topics that they are not authorized to subscribe to.
- User Request 1: Several users requested means to transfer large amounts of data between agents without using the message bus.

VOLTTRON Interconnect Protocol (VIP) was created to address these issues but unfortunately, it broke the easy to use pub-sub messaging model of VOLTTRON. Additionally to use the security features of VOLTTRON in 3.0 code has become an ordeal especially when multiple platforms are concerned. Finally, VIP has introduced the requirement for knowledge of specific other platforms to agents written by users in order to be able to communicate. The rest of this memo focuses on defining the way VOLTTRON message bus will work going forward indefinitely and should be used as the guiding principles for any future work on VIP and VOLTTRON.

### VOLTTRON Message Bus Guiding Principles:

1. All communications between two or more different VOLTTRON platforms **MUST** go through the VIP Router. Said another way, a user agent (application) should have *NO* capability to reach out to an agent on a different VOLTTRON platform directly.

All communications between two or more VOLTTRON platforms must be in the form of topics on the message bus. Agents *MUST* not use a distinct platform address or name to communicate via a direct connection between two platforms.

2. VOLTTRON will use two TCP ports. One port is used to extend VIP across platforms. A second port is used for the VOLTTRON discovery protocol (more on this to come on a different document). VIP will establish bi-directional communication via a single TCP port.
3. In order to solve the bootstrapping problem that CurveMQ has punted on, we will modify VIP to operate similar (behaviorally) to SSH.
  - A. On a single VOLTTRON platform, the platform's public key will be made available via an API so that all agents will be able to communicate with the platform. Additionally, the behavior of the platform will be changed so that agents on the same platform will automatically be added to the *auth.json* file. No more need for user to add the agents manually to the file. The desired behavior is similar to how SSH handles *known\_hosts*.

---

**Note:** This behavior still addresses the security request 1 & 2.

---

- B. When connecting VOLTTRON platforms, VOLTTRON Discovery Protocol (VDP) will be used to discover the other platforms public key to establish the router to router connection. Note that since we *BANNED* agent to agent communication between two platforms, we have prevented an " $O(N^2)$ " communication pattern and key bootstrapping problem.
- C. Authorization determines what agents are allowed to access what topics. Authorization **MUST** be managed by the VOLTTRON Central platform on a per organization basis. It is not recommended to have different authorization profiles on different VOLTTRON instances belonging to the same organization.
- D. VOLTTRON message bus uses topics such as and will adopt an information model agreed upon by the VOLTTRON community going forward. Our initial information model is based on the OpenEIS schema going forward. A different document will describe the information model we have adopted going forward. All agents are



free to create their own topics but the VOLTTTRON team (going forward) will support the common VOLTTTRON information model and all agents developed by PNNL will be converted to use the new information model.

- E. Two connected VOLTTTRON systems will exchange a list of available topics via the message router. This will allow each VIP router to know what topics are available at what VOLTTTRON platform.
- F. Even though each VOLTTTRON platform will have knowledge of what topics are available around itself, no actual messages will be forwarded between VOLTTTRON platforms until an agent on a specific platform subscribes to a topic. When an agent subscribes to a topic that has a publisher on a different VOLTTTRON platform, the VIP router will send a request to its peer routers so that the messages sent to that topic will be forwarded. There will be cases (such as clean energy transactive project) where the publisher to a topic may be multiple hops away. In this case, the subscribe request will be sent towards the publisher through other VIP routers. In order to find the most efficient path, we may need to keep track of the total number of hops (in terms of number of VIP routers).
- G. The model described in steps 5/6/7 applies to data collection. For control applications, VOLTTTRON team only allows control actions to be originated from the VOLTTTRON instance that is directly connected to that controlled device. This decision is made to increase the robustness of the control agent and to encourage truly distributed applications to be developed.
- H. Direct agent to agent communication will be supported by creation of an ephemeral topic under the topic hierarchy. Our measurements have shown repeatedly that the overhead of using the ZeroMQ message pub/sub is minimal and has zero impact on communications throughput.

In summary, by making small changes to the way VIP operates, I believe that we can significantly increase the usability of the platform and also correct the mixing of two communication platforms into VIP. VOLTTTRON message bus will return to being a pub/sub messaging system going forward. Direct agent to agent communication will be supported through the message bus.

## Agent VIP IDENTITY Assignment Specification

This document explains how an agent obtains its *VIP IDENTITY*, how the platform sets an agent's VIP IDENTITY at startup, and what mechanisms are available to the user to set the VIP IDENTITY for any agent.

### What is a VIP IDENTITY

A VIP IDENTITY is a platform instance unique identifier for agents. The IDENTITY is used to route messages from one Agent through the VOLTTTRON router to the recipient Agent. The VIP IDENTITY provides a consistent, user defined, and human readable character set to build a VIP IDENTITY. VIP IDENTITIES should be composed of both upper and lowercase letters, numbers and the following special characters.

### Runtime

The primary interface for obtaining a VIP IDENTITY *at runtime* is via the runtime environment of the agent. At startup the utility function *vip\_main* shall check for the environment variable **AGENT\_VIP\_IDENTITY**. If the **AGENT\_VIP\_IDENTITY** environment variable is not set then the *vip\_main* function will fall back to a supplied identity argument. *vip\_main* will pass the appropriate identity argument to the agent constructor. If no identity is set the Agent class will create a random VIP IDENTITY using python's *uuid4* function.

An agent that inherits from the platform's base Agent class can get its current VIP IDENTITY by retrieving the value of `self.core.identity`.

The primary use of the 'identity' argument to *vip\_main* is for agent development. For development it allows agents to specify a default VIP IDENTITY when run outside the platform. As platform Agents are not started via *vip\_main* they will simply receive their VIP IDENTITY via the identity argument when they are instantiated. Using the identity argument of the Agent constructor to set the VIP IDENTITY via agent configuration is no longer supported.

At runtime the platform will set the environment variable **AGENT\_VIP\_IDENTITY** to the value set at installation time.

Agents not based on the platform's base Agent should set their VIP IDENTITY by setting the identity of the ZMQ socket before the socket connects to the platform. If the agent fails to set it's VIP IDENTITY via the ZMQ socket it will be selected automatically by the platform. This platform chosen ID is currently not discoverable to the agent.

## Agent Implementation

If an Agent has a preferred VIP IDENTITY (for example the Platform Driver Agent prefers to use "platform.driver") it may specify this as a default packed value. This is done by including a file named **IDENTITY** containing only the desired VIP IDENTITY in ASCII plain text in the same directory at the *setup.py* file for the Agent. This will cause the packaged agent wheel to include an instruction to set the VIP IDENTITY at installation time.

This value may be overridden at packaging or installation time.

## Packaging

An Agent may have it's VIP IDENTITY configured when it is packaged. The packaged value may be used by the platform to set the **AGENT\_VIP\_IDENTITY** environment variable for the agent process.

The packaged VIP IDENTITY may be overridden at installation time. This overrides any preferred VIP IDENTITY of the agent. This will cause the packaged agent wheel to include an instruction to set the VIP IDENTITY at installation time.

To specify the VIP IDENTITY when packaging use the `--vip-identity` option when running *volttron-pkg package*.

## Installation

An agent may have it's VIP IDENTITY configured when it is installed. This overrides any VIP IDENTITY specified when the agent was packaged.

To specify the VIP IDENTITY when packaging use the `--vip-identity` option when running *volttron-ctl install*.

## Installation Default VIP IDENTITY

If no VIP IDENTITY has been specified by installation time the platform will assign one automatically.

The platform uses the following template to generate a VIP IDENTITY:

```
"{agent_name}_{n}"
```

`{agent_name}` is substituted with the name of the actual agent such as `listeneragent-0.1`

`{n}` is a number to make VIP IDENTITY unique. `{n}` is set to the first unused number (starting from 1) for all installed instances of an agent. e.g. If there are 2 listener agents installed and the first (VIP IDENTITY `listeneragent-0.1_1`) is uninstalled leaving the second (VIP IDENTITY `"listeneragent-0.1_2"`), a new listener agent will receive the VIP IDENTITY `"listeneragent-0.1_1"` when installed. The next installed listener will receive a VIP IDENTITY of `"listeneragent-0.1_3"`.

The `#` sign is used to prevent confusing the agent version number with the installed instance number.

If an agent is repackaged with a new version number it is treated as a new agent and the number will start again from 1.

## VIP IDENTITY Conflicts During Installation

If an agent is assigned a VIP IDENTITY besides the default value given to it by the platform it is possible for VIP IDENTITY conflicts to exist between installed agents. In this case the platform rejects the installation of an agent with a conflicting VIP IDENTITY and reports an error to the user.

## VIP IDENTITY Conflicts During Runtime

In the case where agents are not started through the platform (usually during development or when running standalone agents) it is possible to encounter a VIP IDENTITY conflict during runtime. In this case the first agent to use a VIP IDENTITY will function as normal. Subsequent agents will still connect to the ZMQ socket but will be silently rejected by the platform router. The router will not route any message to that Agent. Agents using the platforms base Agent will detect this automatically during the initial handshake with the platform. This condition will shutdown the Agent with an error indicating a VIP IDENTITY conflict as the most likely cause of the problem.

## Auto Numbering With Non-Default VIP IDENTITIES

It is possible to use the auto numbering mechanism that the default VIP IDENTITY scheme uses. Simply include the string `{n}` somewhere in the requested VIP IDENTITY and it will be replaced with a number in the same manner as the default VIP IDENTITY is. Python `string.format()` escaping rules apply. [See this question on StackOverflow](#).

## Script Features

The `scripts/install-agent.py` script supports specifying the desired VIP IDENTITY using the `-i` (or `--vip-identity`) `<identity>` option

## Security/Privacy

Currently, much like the `TAG` file in an installed agent, there is nothing to stop someone from modifying the `IDENTITY` file in the installed agent.

## Constraints and Limitations

Currently there is no way for an agent based on the platform base Agent class to recover from a VIP IDENTITY conflict. This case only affects developers and a very tiny minority of users and is reported via an error message, there are currently no plans to fix it.

## Design Overview

### What Problems does VIP Address?

When VOLTTRON agents, controllers, or other entities needed to exchange data, they previously used the first generation pub/sub messaging mechanism and ad-hoc methods to set up direct connections. While the pub/sub messaging is easy to implement and use, it suffers from several limitations:

- It requires opening two listening sockets: one each for publishing and subscribing.
- There is no trivial way to prevent message spoofing.

- There is no trivial way to enable private messaging
- It is not ideal for peer-to-peer communications.

These limitations have severe security implications. For improved security in VOLTTRON, the communications protocol must provide a method for secure data exchange that is intuitive and simple to implement and use.

Many messaging platforms already provides many of the building blocks to implement encrypted and authenticated communications over a shared socket. They include a socket type implementing the router pattern. What remains is a protocol built on the ZeroMQ and/or RabbitMQ to provide a single connection point, secure message passing, and retain the ability for entities to come and go as they please.

VIP is VOLTTRON protocol implementation targeting the limitations above.

## **ZeroMQ**

### **Why ZeroMQ?**

Rather than reinvent the wheel, VIP makes use of many features already implemented in ZeroMQ, including ZAP and CurveMQ. While VIP doesn't require the use of ZAP or CurveMQ, their use substantially improves security by encrypting traffic over public networks and limiting connections to authenticated peers.

ZeroMQ also provides reliable transports with built-in framing, automatic reconnection, in-process zero-copy message passing, abstractions for underlying protocols, and so much more. While some of these features create other pain points, they are minimal compared with the effort of either reimplementing or cobbling together libraries.

### **VIP is a routing protocol**

VIP uses the ZeroMQ router pattern. Specifically, the router binds a ROUTER socket and peers connect using a DEALER or ROUTER socket. Unless the peer is connecting a single socket to multiple routers, using the DEALER socket is easiest, but there are instances where using a ROUTER is more appropriate. One must just exercise care to include the proper address envelope to ensure proper routing.

### **Extensible Security**

VIP makes no assumptions about the security mechanisms used. It works equally well over encrypted or unencrypted channels. Any connection-level authentication and encryption is handled by ZAP. Message-level authentication can be implemented in the protocols and services using VIP or by utilizing message properties set in ZAP replies.

### **ZeroMQ Compatibility**

For enhanced security, VOLTTRON recommends libzmq version 4.1 or greater, however, most features of VIP are available with older versions. The following is an incomplete list of core features available with recent versions of libzmq.

- Version 3.2:
  - Basic, unauthenticated, unencrypted routing
  - Use ZMQ\_ROUTER\_BEHAVIOR socket option instead of ZMQ\_ROUTER\_MANDATORY
- Version 4.0:
  - Adds authentication and encryption via ZAP

- Version 4.1:
  - Adds message properties allowing correlating authentication tokens to messages

## Message Format and Version Detection

VIP uses a simple, multi-frame format for its messages. The first one (for peers) or two (for router) frames contain the delivery address(es) and are followed immediately by the VIP signature `VIP1`. The first characters of the signature are used to match the protocol and the last character digit indicates the protocol version, which will be incremented as the protocol is revised. This allows for fail-fast behavior and backward compatibility while being simple to implement in any language supported by ZeroMQ.

## Formal Specification

### Architecture

VIP defines a message-based dialog between a *router* that transfers data between *peers*. The *router* and *peers* SHALL communicate using the following socket types and transports:

- The router SHALL use a ROUTER socket.
- Peers SHALL use a DEALER or ROUTER socket.
- The router SHALL bind to one or more endpoints using `inproc`, `tcp`, or `ipc` address types.
- Peers SHALL connect to these endpoints.
- There MAY be any number of peers.

### Message Format

A routing exchange SHALL consist of a peer sending a message to the router followed by the router receiving the message and sending it to the destination peer.

Messages sent to the router by peers SHALL consist of the following message frames:

- The *recipient*, which SHALL contain the socket identity of the destination peer.
- The protocol signature, which SHALL contain the four octets `"VIP1"`.
- The *user id*, which SHALL be an implementation-defined value.
- The *request id*, which SHALL contain an opaque binary blob.
- The *subsystem*, which SHALL contain a string.
- The *data*, which SHALL be zero or more subsystem-specific opaque frames.

Messages received from a peer by the router will automatically have a *sender* frame prepended to the message by the ROUTER socket. When the router forwards the message, the sender and recipient fields are swapped so that the *recipient* is in the first frame and the *sender* is in the second frame. The *recipient* frame is automatically stripped by the ROUTER socket during delivery. Peers using ROUTER sockets must prepend the message with an *intermediary* frame, which SHALL contain the identity of a router socket.

Messages received from the router by peers SHALL consist of the following message frames:

- The *sender*, which SHALL contain the socket identity of the source peer.
- The protocol signature, which SHALL contain the four octets `"VIP1"`.

- The *user id*, which MAY contain a UTF-8 encoded string.
- The *request id*, which SHALL contain an opaque binary blob.
- The *subsystem*, which SHALL contain a non-empty string.
- The *data*, which SHALL be zero or more subsystem-specific opaque frames.

The various fields have these meanings:

- sender: the ZeroMQ DEALER or ROUTER identity of the sending (source) peer.
- recipient: the ZeroMQ DEALER or ROUTER identity of the recipient (destination) peer.
- intermediary: the ZeroMQ ROUTER identity of the intermediary router.
- user id: VIP authentication metadata set in the authenticator. See the discussion below for more information on this value.
- request id: the meaning of this field is defined by the sending peer. Replies SHALL echo the request id without modifying it.
- subsystem: this specifies the peer subsystem the data is intended for. The length of a subsystem name SHALL NOT exceed 255 characters and MUST only contain ASCII characters.
- data: provides the data for the given subsystem. The number of frames required is defined by each subsystem.

## User ID

The value in the *user id* frame depends on the implementation and the version of ZeroMQ. If ZAP is used with libzmq 4.1.0 or newer, peers should send an empty string for the user id and the ZAP authenticator will replace it with an authentication token which receiving peers may use to authorize access. If ZAP is not used or a version of libzmq is used which lacks support for retrieving the user id metadata, an authentication subsystem may be used to authenticate peers. The authentication subsystem SHALL provide peers with private tokens that must be sent with each message in the user id frame and which the router will substitute with a public token before forwarding. If the message cannot be authenticated, the user id received by peers SHALL be a zero-length string.

## Socket Types

Peers communicating via the router will typically use DEALER sockets and should not require additional handling. However, a DEALER peer may only connect to a single router. Peers may use ROUTER sockets to connect to multiple endpoints, but must prepend the routing ID of the destination.

When using a DEALER socket:

- A peer SHALL not send in intermediary address.
- A peer SHALL connect to a single endpoint.

When using a ROUTER socket:

- A peer SHALL prepend the intermediary routing ID of to the message frames.
- A peer MAY connect to multiple endpoints.

## Routing Identities

Routing identities are set on a socket using the `ZMQ_IDENTITY` socket option and **MUST** be set on both `ROUTER` and `DEALER` sockets. The following additional requirements are placed on the use of peer identities:

- Peers **SHALL** set a valid identity rather than rely on automatic identity generation.
- The router **MAY** drop messages with automatically generated identities, which begin with the zero byte ('0').

A zero length identity is invalid for peers and is, therefore, unroutable. It is used instead to address the router itself.

- Peers **SHALL** use a zero length recipient to address the router.
- Messages sent from the router **SHALL** have a zero length sender address.

## Error Handling

The documented default behavior of ZeroMQ `ROUTER` sockets when entering the mute state (when the send buffer is full) is to silently discard messages without blocking. This behavior, however, is not consistently observed. Quietly discarding messages is not the desired behavior anyway because it prevents peers from taking appropriate action to the error condition.

- Routers **SHALL** set the `ZMQ_SNDTIMEO` socket option to 0.
- Routers **SHALL** forward `EAGAIN` errors to sending peers.

It is also the default behavior of `ROUTER` sockets to silently drop messages addressed to unknown peers.

- Routers **SHALL** set the `ZMQ_ROUTER_MANDATORY` socket option.
- Routers **SHALL** forward `EHOSTUNREACH` errors to sending peers, unless the recipient address matches the sender.

Most subsystems are optional and some way of communicating unsupported subsystems to peers is needed.

- The error code 93, `EPROTONOSUPPORT`, **SHALL** be returned to peers to indicate unsupported or unimplemented subsystems.

The errors above are reported via the *error* subsystem. Other errors **MAY** be reported via the *error* subsystem, but subsystems **SHOULD** provide mechanisms for reporting subsystem-specific errors whenever possible.

An error message must contain the following:

- The recipient frame **SHALL** contain the socket identity of the original sender of the message.
- The sender frame **SHALL** contain the socket identity of the reporting entity, usually the router.
- The request ID **SHALL** be copied from the from the message which triggered the error.
- The subsystem frame **SHALL** be the 5 octets 'error'.
- The first data frame **SHALL** be a string representation of the error number.
- The second data frame **SHALL** contain a UTF-8 string describing the error.
- The third data frame **SHALL** contain the identity of the original recipient, as it may differ from the reporter.
- The fourth data frame **SHALL** contain the subsystem copied from the subsystem field of the offending message.

## Subsystems

Peers may support any number of communications protocols or subsystems. For instance, there may be a remote procedure call (RPC) subsystem which defines its own protocol. These subsystems are outside the scope of VIP and this document with the exception of the *hello* and *ping* subsystems.

- A router SHALL implement the hello subsystem.
- All peers and routers SHALL implement the ping subsystem.

## The hello Subsystem

The hello subsystem provides one simple RPC-style routine for peers to probe the router for version and identity information.

A peer hello request message must contain the following:

- The recipient frame SHALL have a zero length value.
- The request id MAY have an opaque binary value.
- The subsystem SHALL be the 5 characters “hello”.
- The first data frame SHALL be the five octets ‘hello’ indicating the operation.

A peer hello reply message must contain the following:

- The sender frame SHALL have a zero length value.
- The request id SHALL be copied unchanged from the associated request.
- The subsystem SHALL be the 7 characters “hello”.
- The first data frame SHALL be the 7 octets ‘welcome’.
- The second data frame SHALL be a string containing the router version number.
- The third data frame SHALL be the router’s identity blob.
- The fourth data frame SHALL be the peer’s identity blob.

The hello subsystem can help a peer with the following tasks:

- Test that a connection is established.
- Discover the version of the router.
- Discover the identity of the router.
- Discover the identity of the peer.
- Discover authentication metadata.

For instance, if a peer will use a ROUTER socket for its connections, it must first know the identity of the router. The peer might first connect with a DEALER socket, issue a hello, and use the returned identity to then connect the ROUTER socket.



## The ping Subsystem

The *ping* subsystem is useful for testing the presence of a peer and the integrity and latency of the connection. All endpoints, including the router, must support the ping subsystem.

A peer ping request message must contain the following:

- The recipient frame **SHALL** contain the identity of the endpoint to query.
- The request id **MAY** have an opaque binary value.
- The subsystem **SHALL** be the 4 characters “ping”.
- The first data frame **SHALL** be the 4 octets ‘ping’.
- There **MAY** be zero or more additional data frames containing opaque binary blobs.

A ping response message must contain the following:

- The sender frame **SHALL** contain the identity of the queried endpoint.
- The request id **SHALL** be copied unchanged from the associated request.
- The subsystem **SHALL** be the 4 characters “ping”.
- The first data frame **SHALL** be the 4 octets ‘pong’.
- The remaining data frames **SHALL** be copied from the ping request unchanged, starting with the second data frame.

Any data can be included in the ping and should be returned unchanged in the pong, but limited trust should be placed in that data as it is possible a peer might modify it against the direction of this specification.

## Discovery

VIP does not define how to discover peers or routers. Typical options might be to hard code the router address in peers or to pass it in via the peer configuration. A well known (i.e. statically named) directory service might be used to register connected peers and allow for discovery by other peers.

## Example Exchanges

These examples show the messages *as sent on the wire* as sent or received by peers using DEALER sockets. The messages received or sent by peers or routers using ROUTER sockets will have an additional address at the start. We do not show the frame sizes or flags, only frame contents.

### Example of hello Request

This shows a hello request sent by a peer, with identity “alice”, to a connected router, with identity “router”.

```

++
| |                               Empty recipient frame
++-----+
| VIP1 |                         Signature frame
++-----+
| |                               Empty user ID frame
++-----+
| 0001 |                         Request ID, for example "0001"
+-----++

```

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```

| hello |      Subsystem, "hello" in this case
+-----+
| hello |      Operation, "hello" in this case
+-----+

```

This example assumes a DEALER socket. If a peer uses a ROUTER socket, it SHALL prepend an additional frame containing the router identity, similar to the following example.

This shows the example request received by the router:

```

+-----+
| alice |      Sender frame, "alice" in this case
+-----+
| |          Empty recipient frame
+-----+
| VIP1 |      Signature frame
+-----+
| |          Empty user ID frame
+-----+
| 0001 |      Request ID, for example "0001"
+-----+
| hello |      Subsystem, "hello" in this case
+-----+
| hello |      Operation, "hello" in this case
+-----+

```

This shows an example reply sent by the router:

```

+-----+
| alice |      Recipient frame, "alice" in this case
+-----+
| |          Empty sender frame
+-----+
| VIP1 |      Signature frame
+-----+
| |          Empty authentication metadata in user ID frame
+-----+
| 0001 |      Request ID, for example "0001"
+-----+
| hello |      Subsystem, "hello" in this case
+-----+
| welcome |    Operation, "welcome" in this case
+-----+
| 1.0 |      Version of the router
+-----+
| router |     Router ID, "router" in this case
+-----+
| alice |     Peer ID, "alice" in this case
+-----+

```

This shows an example reply received by the peer:

```

+-+
| |          Empty sender frame
+-----+
| VIP1 |      Signature frame
+-----+

```

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```

| |                               Empty authentication metadata in user ID frame
+-+-----+
| 0001 |                           Request ID, for example "0001"
+-----++
| hello |                           Subsystem, "hello" in this case
+-----++
| welcome |                         Operation, "welcome" in this case
+-----++
| 1.0 |                             Version of the router
+-----++
| router |                           Router ID, "router" in this case
+-----++
| alice |                           Peer ID, "alice" in this case
+-----++

```

### Example of ping Subsystem

This shows a ping request sent by the peer “alice” to the peer “bob” through the router “router”.

```

+-----+
| bob |                             Recipient frame, "bob" in this case
+-----+
| VIP1 |                           Signature frame
+-+-----+
| |                               Empty user ID frame
+-+-----+
| 0002 |                           Request ID, for example "0002"
+-----+
| ping |                           Subsystem, "ping" in this case
+-----+
| ping |                           Operation, "ping" in this case
+-----+
| 1422573492 |                     Data, a single frame in this case (Unix timestamp)
+-----+

```

This shows the example request received by the router:

```

+-----+
| alice |                           Sender frame, "alice" in this case
+-----+
| bob |                             Recipient frame, "bob" in this case
+-----+
| VIP1 |                           Signature frame
+-+-----+
| |                               Empty user ID frame
+-+-----+
| 0002 |                           Request ID, for example "0002"
+-----+
| ping |                           Subsystem, "ping" in this case
+-----+
| ping |                           Operation, "ping" in this case
+-----+
| 1422573492 |                     Data, a single frame in this case (Unix timestamp)
+-----+

```

This shows the example request forwarded by the router:

```
+-----+
| bob |      Recipient frame, "bob" in this case
+-----++
| alice |    Sender frame, "alice" in this case
+-----++
| VIP1 |     Signature frame
+-+-----+
| |         Empty authentication metadata in user ID frame
+-+-----+
| 0002 |     Request ID, for example "0002"
+-----++
| ping |     Subsystem, "ping" in this case
+-----++
| ping |     Operation, "ping" in this case
+-----+-----+
| 1422573492 | Data, a single frame in this case (Unix timestamp)
+-----+-----+
```

This shows the example request received by “bob”:

```
+-----+
| alice |    Sender frame, "alice" in this case
+-----++
| VIP1 |     Signature frame
+-+-----+
| |         Empty authentication metadata in user ID frame
+-+-----+
| 0002 |     Request ID, for example "0002"
+-----++
| ping |     Subsystem, "ping" in this case
+-----++
| ping |     Operation, "ping" in this case
+-----+-----+
| 1422573492 | Data, a single frame in this case (Unix timestamp)
+-----+-----+
```

If “bob” were using a ROUTER socket, there would be an additional frame prepended to the message containing the router identity, “router” in this case.

This shows an example reply from “bob” to “alice”

```
+-----+
| alice |    Recipient frame, "alice" in this case
+-----++
| VIP1 |     Signature frame
+-+-----+
| |         Empty user ID frame
+-+-----+
| 0002 |     Request ID, for example "0002"
+-----++
| ping |     Subsystem, "ping" in this case
+-----++
| pong |     Operation, "pong" in this case
+-----+-----+
| 1422573492 | Data, a single frame in this case (Unix timestamp)
+-----+-----+
```

The message would make its way back through the router in a similar fashion to the request.

## Reference Implementation

Reference VIP router: <https://github.com/VOLTTTRON/volttron/blob/master/volttron/platform/vip/router.py>

Reference VIP peer: <https://github.com/VOLTTTRON/volttron/blob/master/volttron/platform/vip/socket.py>

### 2.4.3 RabbitMQ Overview

RabbitMQ is a new message bus that was integrated with VOLTTTRON in VOLTTTRON 6 version. RabbitMQ provides many of the features off the shelf that had to be custom built for ZeroMQ based message bus. VOLTTTRON leverages many of these features and take advantage of large pre-existing and growing industry support for RabbitMQ development.

---

**Note:** Some of the RabbitMQ summary/overview documentation and supporting images added here are taken from the [RabbitMQ official documentation](#).

---

## RabbitMQ Library

RabbitMQ is the most popular messaging library with over 35,000 production deployments. It is highly scalable, easy to deploy, runs on many operating systems and cloud environments. It supports many kinds of distributed deployment methodologies such as clusters, federation and shovels.

RabbitMQ uses *Advanced Message Queueing Protocol* (AMQP) and works on the basic producer consumer model. A consumer is a program that consumes/receives messages and producer is a program that sends the messages. Following are some important definitions that we need to know before we proceed.

- Queue - Queues can be considered like a post box that stores messages until consumed by the consumer. Each consumer must create a queue to receives messages that it is interested in receiving. We can set properties to the queue during it's declaration. The queue properties are:
  - Name - Name of the queue
  - Durable - Flag to indicate if the queue should survive broker restart.
  - Exclusive - Used only for one connection and it will be removed when connection is closed.
  - Auto-queue - Flag to indicate if auto-delete is needed. The queue is deleted when last consumer unsubscribes from it.
  - Arguments - Optional, can be used to set message TTL (Time To Live), queue limit etc.
- Bindings - Consumers bind the queue to an exchange with binding keys or routing patterns. Producers send messages and associate them with a routing key. Messages are routed to one or many queues based on a pattern matching between a message routing key and binding key.
- Exchanges - Exchanges are entities that are responsible for routing messages to the queues based on the routing pattern/binding key used. They look at the routing key in the message when deciding how to route messages to queues. There are different types of exchanges and one must choose the type of exchange depending on the application design requirements
  1. Fanout - It blindly broadcasts the message it receives to all the queues it knows.
  2. Direct - Here, the message is routed to a queue if the routing key of the message exactly matches the binding key of the queue.

3. Topic - Here, the message is routed to a queue based on pattern matching of the routing key with the binding key. The binding key and the routing key pattern must be a list of words delimited by dots, for example, “car.subaru.outback” or “car.subaru.\*”, “car.#”. A message sent with a particular routing key will be delivered to all the queues that are bound with a matching binding key with some special rules as

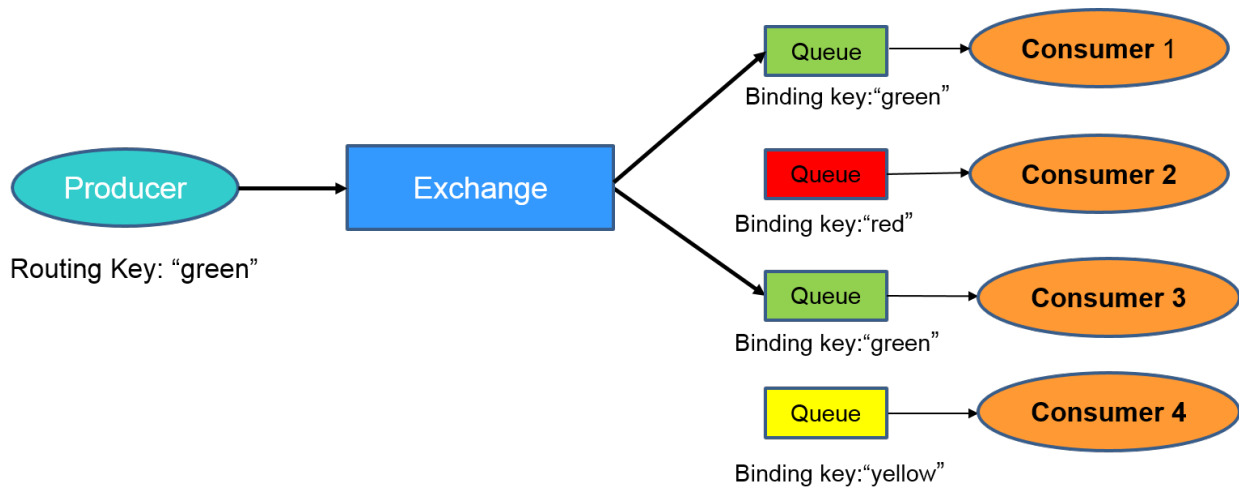
‘\*’ (star) - can match exactly one word in that position. ‘#’ (hash) - can match zero or more words

4. Headers - If we need more complex matching then we can add a header to the message with all the attributes set to the values that need to be matched. The message is considered matching if the values of the attributes in the header is equal to that of the binding. The Header exchange ignores the routing key.

We can set some properties of the exchange during it’s declaration.

- Name - Name of the exchange
- Durable - Flag to indicate if the exchange should survive broker restart.
- Auto-delete - Flag indicates if auto-delete is needed. If set to true, the exchange is deleted when the last queue is unbound from it.
- Arguments - Optional, used by plugins and broker-specific features

Lets use an example to understand how they all fit together. Consider an example where there are four consumers (Consumer 1 - 4) interested in receiving messages matching the pattern “green”, “red” or “yellow”. In this example, we are using a direct exchange that will route the messages to the queues only when there is an exact match of the routing key of the message with the binding key of the queues. Each of the consumers declare a queue and bind the queue to the exchange with a binding key of interest. Lastly, we have a producer that is continuously sending messages to exchange with routing key “green”. The exchange will check for an exact match and route the messages to only Consumer 1 and Consumer 3.



For more information about queues, bindings, exchanges, please refer to the [RabbitMQ tutorial](#).

## Authentication in RabbitMQ

By default RabbitMQ supports SASL PLAIN authentication with username and password. RabbitMQ supports other SASL authentication mechanisms using plugins. In VOLTTRON we use one such external plugin based on x509 certificates (<https://github.com/rabbitmq/rabbitmq-auth-mechanism-ssl>). This authentication is based on a technique called public key cryptography which consists of a key pair - a public key and a private key. Data that has been encrypted with a public key can only be decrypted with the corresponding private key and vice versa. The owner of key pair makes the public key available and keeps the private confidential. To send a secure data to a receiver, a sender encrypts the data with the receiver's public key. Since only the receiver has access to his own private key only the receiver can decrypt. This ensures that others, even if they can get access to the encrypted data, cannot decrypt it. This is how public key cryptography achieves confidentiality.

A digital certificate is a digital file that is used to prove ownership of a public key. Certificates act like identification cards for the owner/entity. Certificates are therefore crucial to determine that a sender is using the right public key to encrypt the data in the first place. Digital Certificates are issued by Certification Authorities(CA). Certification Authorities fulfill the role of the *Trusted Third Party* by accepting Certificate applications from entities, authenticating applications, issuing Certificates and maintaining status information about the Certificates issued. Each CA has its own public private key pair and its public key certificate is called a root CA certificate. The CA attests to the identity of a Certificate applicant when it signs the Digital Certificate using its private key.

In x509 based authentication, a signed certificate is presented instead of username/password for authentication and if the server recognizes the the signer of the certificate as a trusted CA, accepts and allows the connection. Each server/system can maintain its own list of trusted CAs (i.e. list of public certificates of CAs). Certificates signed by any of the trusted CA would be considered trusted. Certificates can also be signed by intermediate CAs that are in turn signed by a trusted.

This section only provides a brief overview about the SSL based authentication. Please refer to the vast material available online for detailed description. Some useful links to start:

- [https://en.wikipedia.org/wiki/Public-key\\_cryptography](https://en.wikipedia.org/wiki/Public-key_cryptography)
- <https://robertheaton.com/2014/03/27/how-does-https-actually-work/>

## Management Plugin

The RabbitMQ-management plugin provides an HTTP-based API for management and monitoring of RabbitMQ nodes and clusters, along with a browser-based UI and a command line tool, *rabbitmqadmin*. The management interface allows you to:

- Create, Monitor the status and delete resources such as virtual hosts, users, exchanges, queues etc.
- Monitor queue length, message rates and connection information and more
- Manage users and add permissions (read, write and configure) to use the resources
- Manage policies and runtime parameters
- Send and receive messages (for trouble shooting)

For more detailed information about the management plugin, please refer to RabbitMQ documentation on the [Management Plugin](#).

## Message Bus Plugin Framework

The message bus plugin framework aims to decouple the VOLTTRON specific code from the message bus implementation without compromising the existing features of the platform. The concept of the plugin framework is similar to that used in historian or driver framework i.e, we should be easily able to support multiple message buses and be able to use any of them by following few installation and setup steps.

## Message Bus Refactor

### It consists of five components

1. New connection class per message bus
2. Extensions to platform router functionality
3. Extensions to core agent functionality
4. A proxy agent for each message bus to support backward compatibility
5. Authentication related changes

## Connection class

### A connection class that has methods to handle

1. Connection to new message bus.
2. Set properties such as message transmission rate, send/receive buffer sizes, open socket limits etc.
3. Send/receive messages from the underlying layer.
4. Error handling functionality.
5. Disconnect from the message bus

## Platform Level Changes

A new message bus flag is introduced to indicate the type of message bus used by the platform. If no message bus flag is added in the platform config file, the platform uses default ZeroMQ based message bus.

Path of the config: \$VOLTTRON\_HOME/config

```
[volttron]
vip-address = tcp://127.0.0.1:22916
instance-name = volttron1
message-bus = rmq
```

Please note, the valid message types are ‘zmq’ and ‘rmq’.

On startup, platform checks for the type of message bus and creates appropriate router module. Please note, ZeroMQ router functionality remains unchanged. However, a new router module with limited functionality is added for RabbitMQ message bus. The actual routing of messages is handed over to the RabbitMQ broker and router module will only handle some of the necessary subsystem messages such as “hello”, “peerlist”, “query” etc. If a new message bus needs to be added then the complexity of the router module depends on whether the messaging library uses a broker based or broker less (as in case of ZeroMQ) protocol.



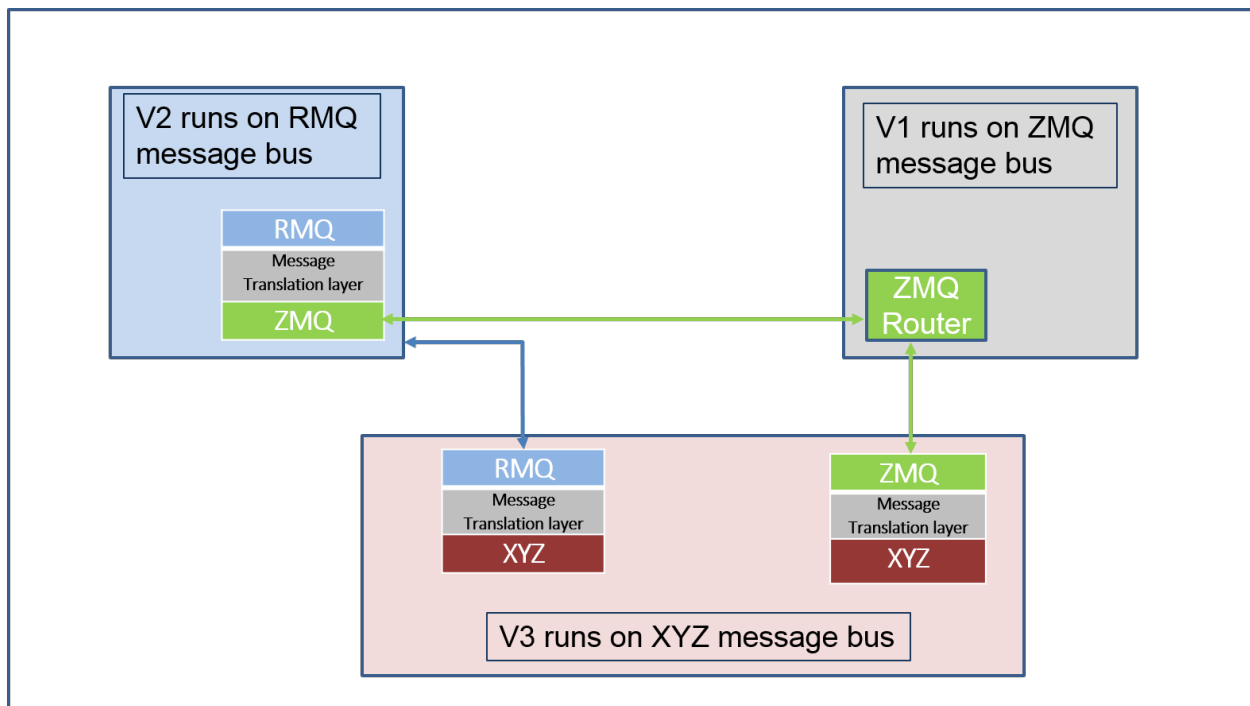
## Agent Core Changes

The application specific code of the agent remains unchanged. The agent core functionality is modified to check the type of message bus and connect to and use the appropriate message bus. On startup, the agent Core checks the type of message bus, connects to appropriate message bus and routes messages to appropriate subsystem. All subsystem messages are encapsulated inside a message bus agnostic VIP message object. If a new message bus needs to be added, then we would have to extend the Agent Core to connect to new message bus.

## Compatibility Between VOLTRON Instances Running On Different Message Buses

All the agents connected to local platform uses the same message bus that the platform is connected to. But if we need agents running on different platforms with different message buses to communicate with each other then we need some kind of proxy entity or bridge that establishes the connection, handles the message routing and performs the message translation between the different message formats. To achieve that, we have a proxy agent that acts as a bridge between the local message bus and remote message bus. The role of the proxy agent is to

- Maintain connections to internal and external message bus.
- Route messages from internal to external platform.
- Route messages from external to internal platform.



The above figure shows three VOLTRON instances with V1 connected to ZMQ message bus, V2 connected to RMQ message bus and V3 connected to XYZ (some message bus of the future) and all three want to connect to each other. Then V2 and V3 will have proxy agents that get connected to the local bus and to the remote bus and forward messages from one to another.

## RabbitMQ Based VOLTTRON

RabbitMQ VOLTTRON uses the *Pika* library for the RabbitMQ message bus implementation. To install Pika, it is recommended to use the VOLTTRON *bootstrap.py* script:

```
python3 bootstrap.py --rabbitmq
```

## Configuration

To setup a VOLTTRON instance to use the RabbitMQ message bus, we need to first configure VOLTTRON to use the RabbitMQ message library. The contents of the RabbitMQ configuration file should follow the pattern below.

Path: `$VOLTTRON_HOME/rabbitmq_config.yml`

```
#host parameter is mandatory parameter. fully qualified domain name
host: mymachine.pnl.gov

# mandatory. certificate data used to create root ca certificate. Each volttron
# instance must have unique common-name for root ca certificate
certificate-data:
  country: 'US'
  state: 'Washington'
  location: 'Richland'
  organization: 'PNNL'
  organization-unit: 'VOLTTRON Team'
  # volttron1 has to be replaced with actual instance name of the VOLTTRON
  common-name: 'volttron1_root_ca'
#
# optional parameters for single instance setup
#
virtual-host: 'volttron' # defaults to volttron

# use the below four port variables if using custom rabbitmq ports
# defaults to 5672
amqp-port: '5672'

# defaults to 5671
amqp-port-ssl: '5671'

# defaults to 15672
mgmt-port: '15672'

# defaults to 15671
mgmt-port-ssl: '15671'

# defaults to true
ssl: 'true'

# defaults to ~/rabbitmq_server/rabbitmq_server-3.9.7
rmq-home: "~/rabbitmq_server/rabbitmq_server-3.9.7"
```

Each VOLTTRON instance resides within a RabbitMQ virtual host. The name of the virtual host needs to be unique per VOLTTRON instance if there are multiple virtual instances within a single host/machine. The hostname needs to be able to resolve to a valid IP. The default port of an AMQP port without authentication is *5672* and with authentication it is *5671*. The default management HTTP port without authentication is *15672* and with authentication is *15671*. These needs to be set appropriately if the default ports are not used.

The ‘ssl’ flag indicates if SSL based authentication is required or not. If set to *True*, information regarding SSL certificates needs to be also provided. SSL based authentication is described in detail in [Authentication And Authorization With RabbitMQ Message Bus](#).

To configure the VOLTTTRON instance to use RabbitMQ message bus, run the following command:

```
vcfg rabbitmq single [--config optional path to rabbitmq_config.yml]
```

At the end of the setup process, a RabbitMQ broker is setup to use the configuration provided. A new topic exchange for the VOLTTTRON instance is created within the configured virtual host.

On platform startup, VOLTTTRON checks for the type of message bus to be used. If using the RabbitMQ message bus, the RabbitMQ platform router is instantiated. The RabbitMQ platform router:

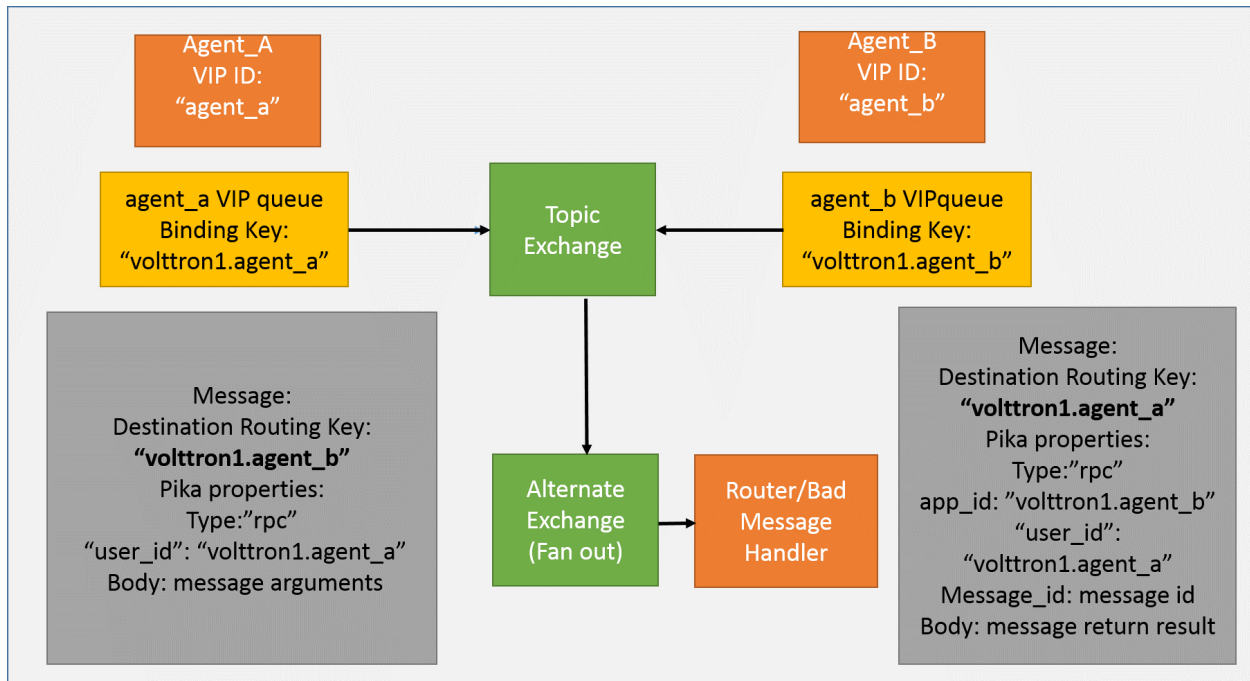
- Connects to RabbitMQ broker (with or without authentication)
- Creates a VIP queue and binds itself to the “VOLTTTRON” exchange with binding key *<instance-name>.router*. This binding key makes it unique across multiple VOLTTTRON instances in a single machine as long as each instance has a unique instance name.
- Handles messages intended for router module such as *hello*, *peerlist*, *query* etc.
- Handles “unrouteable” messages - Messages which cannot be routed to any destination agent are captured and an error message indicating “Host Unreachable” error is sent back to the caller.
- Disconnects from the broker when the platform shuts down.

When any agent is installed and started, the Agent Core checks for the type of message bus used. If it is RabbitMQ message bus then:

- It creates a RabbitMQ user for the agent
- If SSL based authentication is enabled, client certificates for the agent is created
- Connect to the RabbitQM broker with appropriate connection parameters
- Creates a VIP queue and binds itself to the “VOLTTTRON” exchange with binding key *<instance-name>.<agent identity>*
- Sends and receives messages using Pika library methods.
- Checks for the type of subsystem in the message packet that it receives and calls the appropriate subsystem message handler.
- Disconnects from the broker when the agent stops or platform shuts down.

## RPC In RabbitMQ VOLTTTRON

The agent functionality remain unchanged regardless of the underlying message bus used, meaning they can continue to use the same RPC interfaces without any change.



Consider two agents with VIP identities “agent\_a” and “agent\_b” connected to VOLTTRON platform with instance name “volttron1”. Agent A and B each have a VIP queue with binding key volttron1.agent\_a and “volttron1.agent\_b”. Following is the sequence of operation when Agent A wants to make RPC call to Agent B:

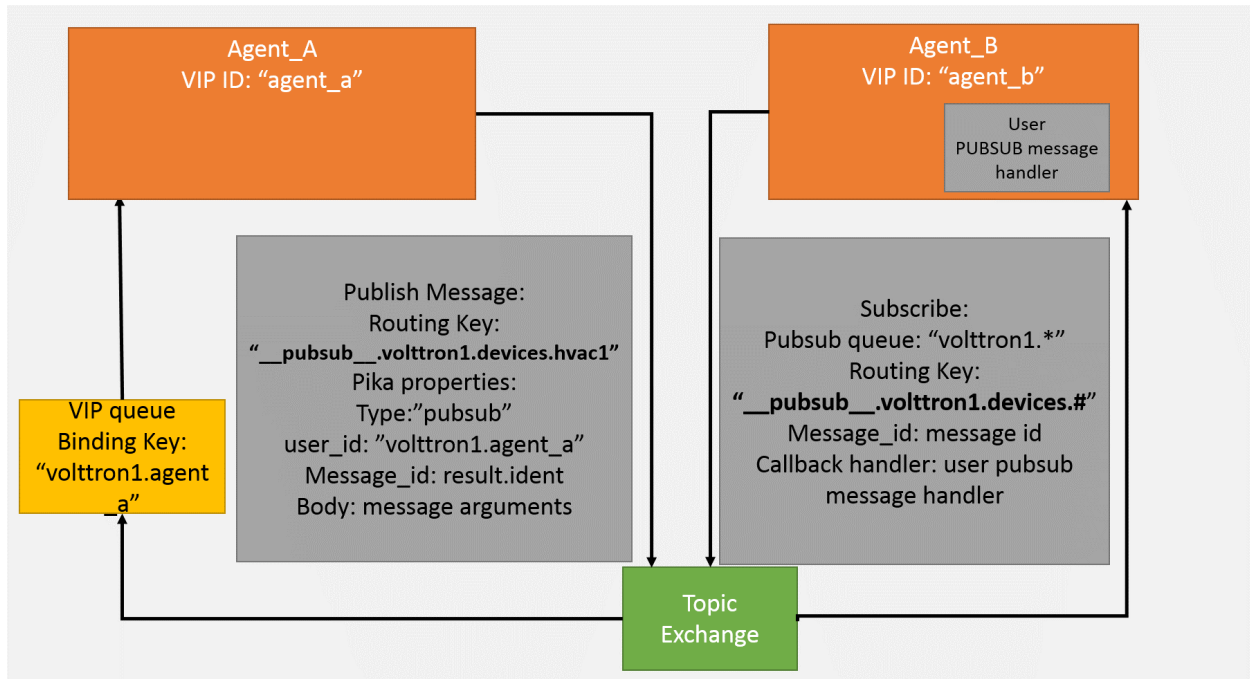
1. Agent A makes a RPC call to Agent B.

```
agent_a.vip.rpc.call("agent_b", set_point, "point_name", 2.5)
```

2. RPC subsystem wraps this call into a VIP message object and sends it to Agent B.
3. The VOLTTRON exchange routes the message to Agent B as the destination routing in the VIP message object matches with the binding key of Agent B.
4. Agent Core on Agent B receives the message, unwraps the message to find the subsystem type and calls the RPC subsystem handler.
5. RPC subsystem makes the actual RPC call `set_point()` and gets the result. It then wraps into VIP message object and sends it back to the caller.
6. The VOLTTRON exchange routes it to back to Agent A.
7. Agent Core on Agent A calls the RPC subsystem handler which in turn hands over the RPC result to Agent A application.

## PUBSUB In RabbitMQ VOLTTRON

The agent functionality remains unchanged irrespective of the platform using ZeroMQ based pubsub or RabbitMQ based pubsub, i.e. agents continue to use the same PubSub interfaces and use the same topic format delimited by “/”. Since RabbitMQ expects binding key to be delimited by ‘.’, RabbitMQ PUBSUB internally replaces ‘/’ with “.”. Additionally, all agent topics are converted to `_pubsub_<instance_name>.<remainder of topic>` to differentiate them from the main Agent VIP queue binding.



Consider two agents with VIP identities "agent\_a" and "agent\_b" connected to VOLTRON platform with instance name "volttron1". Agent A and B each have a VIP queue with binding key "volttron1.agent\_a" and "volttron1.agent\_b". Following is the sequence of operation when Agent A subscribes to a topic and Agent B publishes to same the topic:

1. Agent B makes subscribe call for topic "devices".

```
agent_b.vip.pubsub.subscribe("pubsub", prefix="devices", callback=self.onmessage)
```

2. Pubsub subsystem creates binding key from the topic \_\_pubsub\_\_.volttron1.devices.#
3. It creates a queue internally and binds the queue to the VOLTRON exchange with the above binding key.
4. Agent B is publishing messages with topic: "devices/hvac1".

```
agent_b.vip.pubsub.publish("pubsub", topic="devices/hvac1", headers={}, message="foo")
```

5. PubSub subsystem internally creates a VIP message object and publishes on the VOLTRON exchange.
6. RabbitMQ broker routes the message to Agent B as routing key in the message matches with the binding key of the topic subscription.
7. The pubsub subsystem unwraps the message and calls the appropriate callback method of Agent A.

If agent wants to subscribe to topic from remote instances, it uses:

```
agent.vip.subscribe('pubsub', 'devices.hvac1', all_platforms=True)
```

It is internally set to \_\_pubsub\_\_.\*.<remainder of topic>

## Further Work

The Pubsub subsystem for the ZeroMQ message bus performs  $O(N)$  comparisons where  $N$  is the number of unique subscriptions. The RabbitMQ Topic Exchange was enhanced in version 2.6.0 to reduce the overhead of additional unique subscriptions to almost nothing in most cases. We speculate they are using a tree structure to store the binding keys which would reduce the search time to  $O(1)$  in most cases and  $O(\ln)$  in the worst case. The VOLTTRON PubSub with ZeroMQ could be updated to match this performance scalability with some effort.

## RabbitMQ Management Tool Integrated Into VOLTTRON

Some of the important native RabbitMQ control and management commands are now integrated with the `:ref`volttron-ctl` <Platform-Commands>` (vctl)` utility. Using *volttron-ctl*'s RabbitMQ management utility, we can control and monitor the status of RabbitMQ message bus:

```
vctl rabbitmq --help
usage: vctl command [OPTIONS] ... rabbitmq [-h] [-c FILE] [--debug]
                                           [-t SECS]
                                           [--msgdebug MSGDEBUG]
                                           [--vip-address ZMQADDR]
                                           ...

subcommands:

  add-vhost          add a new virtual host
  add-user           Add a new user. User will have admin privileges
                    i.e,configure, read and write
  add-exchange       add a new exchange
  add-queue          add a new queue
  list-vhosts        List virtual hosts
  list-users         List users
  list-user-properties
                    List users
  list-exchanges     add a new user
  list-exchange-properties
                    list exchanges with properties
  list-queues        list all queues
  list-queue-properties
                    list queues with properties
  list-bindings      list all bindings with exchange
  list-federation-parameters
                    list all federation parameters
  list-shovel-parameters
                    list all shovel parameters
  list-policies      list all policies
  remove-vhosts      Remove virtual host/s
  remove-users       Remove virtual user/s
  remove-exchanges   Remove exchange/s
  remove-queues      Remove queue/s
  remove-federation-parameters
                    Remove federation parameter
  remove-shovel-parameters
                    Remove shovel parameter
  remove-policies    Remove policy
```

For information about using RabbitMQ in multi-platform deployments, view the [docs](#)

## Deployments

The *platform installation* docs describe performing first time setup for single machine RabbitMQ deployments.

See the *multi-platform RabbitMQ* docs for setting up shovel or federation in multi-platform RabbitMQ deployments.

## Authentication And Authorization With RabbitMQ Message Bus

### Authentication In RabbitMQ VOLTRON

RabbitMQ VOLTRON uses SSL based authentication, rather than the default username and password authentication. VOLTRON adds SSL based configuration entries into the *rabbitmq.conf* file during the setup process. The necessary SSL configurations can be seen by running the following command:

```
cat ~/rabbitmq_server/rabbitmq_server-3.9.7/etc/rabbitmq/rabbitmq.conf
```

The configurations required to enable SSL:

```
listeners.ssl.default = 5671
ssl_options.cacertfile = VOLTRON_HOME/certificates/certs/volttron1-trusted-cas.crt
ssl_options.certfile = VOLTRON_HOME/certificates/certs/volttron1-server.crt
ssl_options.keyfile = VOLTRON_HOME/certificates/private/volttron1-server.pem
ssl_options.verify = verify_peer
ssl_options.fail_if_no_peer_cert = true
```

### Parameter explanations

- `listeners.ssl.default`: port for listening for SSL connections
- `ssl_options.cacertfile`: path to trusted Certificate Authorities (CA)
- `ssl_options.certfile`: path to server public certificate
- `ssl_options.keyfile`: path to server's private key
- `ssl_options.verify`: whether verification is enabled
- `ssl_options.fail_if_no_peer_cert`: upon client's failure to provide certificate, SSL connection either rejected (true) or accepted (false)
- `auth_mechanisms.1`: type of authentication mechanism. EXTERNAL means SSL authentication is used

### SSL in RabbitMQ VOLTRON

To configure RabbitMQ-VOLTRON to use SSL based authentication, we need to add SSL configuration in `rabbitmq_config.yml`.

```
# mandatory. fully qualified domain name for the system
host: mymachine.pnl.gov

# mandatory. certificate data used to create root ca certificate. Each volttron
# instance must have unique common-name for root ca certificate
certificate-data:
  country: 'US'
  state: 'Washington'
  location: 'Richland'
```

(continues on next page)

(continued from previous page)

```
organization: 'PNNL'
organization-unit: 'VOLTTRON Team'
# volttron1 has to be replaced with actual instance name of the VOLTTRON instance
common-name: 'volttron1_root_ca'

virtual-host: 'volttron' # defaults to volttron

# use the below four port variables if using custom rabbitmq ports
# defaults to 5672
amqp-port: '5672'

# defaults to 5671
amqp-port-ssl: '5671'

# defaults to 15672
mgmt-port: '15672'

# defaults to 15671
mgmt-port-ssl: '15671'

# defaults to true
ssl: 'true'

# defaults to ~/rabbitmq_server/rabbitmq_server-3.9.7
rmq-home: "~/rabbitmq_server/rabbitmq_server-3.9.7"
```

The parameters of interest for SSL based configuration are

- certificate-data: subject information needed to create certificates
- ssl: Flag set to ‘true’ for SSL based authentication
- amqp-port-ssl: Port number for SSL connection (defaults to 5671)
- mgmt-port-ssl: Port number for HTTPS management connection (defaults to 15671)

We can then configure the VOLTTRON instance to use SSL based authentication with the below command:

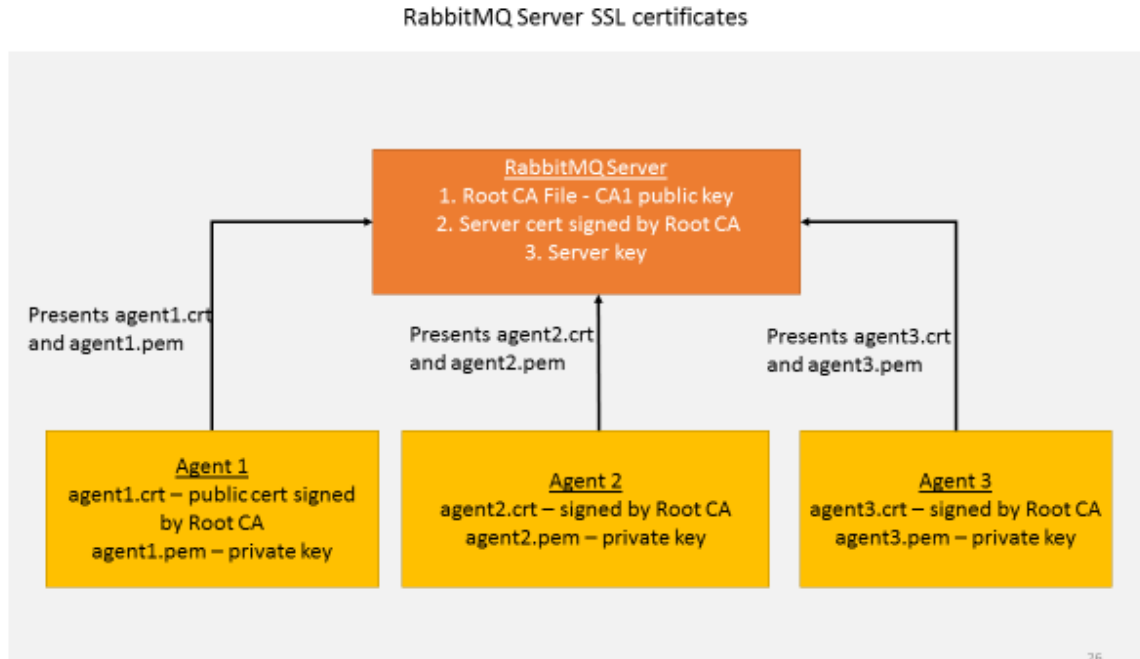
```
vcfg rabbitmq single [-config optional path to rabbitmq_config.yml]
```

When one creates a single instance of RabbitMQ, the following is created / re-created in the VOLTTRON\_HOME/certificates directory:

- Public and private certificates of root Certificate Authority (CA)
- Public and private (automatically signed by the CA) server certificates needed by RabbitMQ broker
- Admin certificate for the RabbitMQ instance
- Public and private (automatically signed by the CA) certificates for VOLTTRON platform service agents.
- Trusted CA certificate

The public files can be found at VOLTTRON\_HOME/certificates/certs and the private files can be found at VOLTTRON\_HOME/certificates/private. The *trusted-cas.crt* file is used to store the root CAs of all VOLTTRON instances that the RabbitMQ server has to connected to. The trusted CA is only created once, but can be updated. Initially, the trusted CA is a copy of the the root CA file, but when an external VOLTTRON instance needs to be connected to an instance, the external VOLTTRON instance’s root CA will be appended to this file in order for the RabbitMQ broker to trust the new connection.





Every RabbitMQ has a single self signed root ca and server certificate signed by the root CA. This is created during VOLTRON setup and the RabbitMQ server is configured and started with these two certificates. Every time an agent is started, the platform automatically creates a pair of public-private certificates for that agent that is signed by the same root CA. When an agent communicates with the RabbitMQ message bus it presents its public certificate and private key to the server and the server validates if it is signed by a root CA it trusts – ie., the root certificate it was started with. Since there is only a single root CA for one VOLTRON instance, all the agents in this instance can communicate with the message bus over SSL.

For information about using SSL with multi-platform RabbitMQ deployments, view the [docs](#)

## Authorization in RabbitMQ VOLTRON

To be implemented in VOLTRON at a later date.

For more detailed information about access control, please refer to RabbitMQ documentation [Access Control](#).

### 2.4.4 Multi-Platform Communication

To connect to remote VOLTRON platforms, we would need platform discovery information of the remote platforms. This information contains the platform name, [VIP](#) address and *serverkey* of the remote platforms and we need to provide this as part of multi-platform configuration.

## Configuration

The configuration and authentication for multi-platform connection can be setup either manually or by running the platforms in set up mode. Both the setups are described below.

### Setup Mode For Automatic Authentication

---

**Note:** It is necessary for each platform to have a web server if running in setup mode.

---

For ease of use and to support multi-scale deployment, the process of obtaining the platform discovery information and authenticating the new platform connection is automated. We can now bypass the manual process of adding auth keys (i.e., either by using the *volttron-ctl* utility or directly updating the *auth.json* config file).

A config file containing list of web addresses (one for each platform) need to be made available in *VOLTTRON\_HOME* directory.

Name of the file: *external\_address.json*

Directory path: Each platform's *VOLTTRON\_HOME* directory.

For example: */home/volttron/volttron1*

Contents of the file:

```
[
  "http://<ip1>:<port1>",
  "http://<ip2>:<port2>",
  "http://<ip3>:<port3>",
  .....
]
```

We then start each VOLTTRON platform with setup mode option in this way.

```
volttron -vv -l volttron.log --setup-mode&
```

Each platform will obtain the platform discovery information of the remote platform that it is trying to connect through a HTTP discovery request and store the information in a configuration file (*\$VOLTTRON\_HOME/external\_platform\_discovery.json*). It will then use the *VIP address* and *serverkey* to connect to the remote platform. The remote platform shall authenticate the new connection and store the auth keys (public key) of the connecting platform for future use.

The platform discovery information will be stored in *VOLTTRON\_HOME* directory and looks like below:

Name of config file: *external\_platform\_discovery.json*

Contents of the file:

```
{ "<platform1 name>": { "vip-address": "tcp://<ip1>:<vip port1>",
                      "instance-name": "<platform1 name>",
                      "serverkey": "<serverkey1>"
                    },
  "<platform2 name>": { "vip-address": "tcp://<ip2>:<vip port2>",
                      "instance-name": "<platform2 name>",
                      "serverkey": "<serverkey2>"
                    },
  "<platform3 name>": { "vip-address": "tcp://<ip3>:<vip port3>",
                      "instance-name": "<platform3 name>",
```

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```

        "serverkey": "<serverkey3>"
    },
    .....
}

```

Each platform will use this information for future connections.

Once the keys have been exchanged and stored in the auth module, we can restart all the VOLTTTRON platforms in normal mode.

```

./stop-voltttron
./start-voltttron

```

## Manual Configuration of External Platform Information

Platform discovery configuration file can also be built manually and it needs to be added inside *VOLTTTRON\_HOME* directory of each platform.

Name of config file: *external\_platform\_discovery.json*

Contents of the file:

```

{ "<platform1 name>": { "vip-address": "tcp://<ip1>:<vip port1>",
                      "instance-name": "<platform1 name>",
                      "serverkey": "<serverkey1>"
                    },
  "<platform2 name>": { "vip-address": "tcp://<ip2>:<vip port2>",
                      "instance-name": "<platform2 name>",
                      "serverkey": "<serverkey2>"
                    },
  "<platform3 name>": { "vip-address": "tcp://<ip3>:<vip port3>",
                      "instance-name": "<platform3 name>",
                      "serverkey": "<serverkey3>"
                    },
  .....
}

```

With this configuration, platforms can be started in normal mode.

```

./start-voltttron

```

For external platform connections to be authenticated, we would need to add the credentials of the connecting platforms in each platform using the *voltttron-ctl auth* utility. For more details [Agent authentication walk-through](#).

**See also:**

*Multi-Platform Walk-through*

## **PubSub Communication Between Remote Platforms**

This document describes pubsub communication between different platforms. The goal of this specification is to improve forward historians forwarding local PubSub messages to remote platforms. Agents interested in receiving PubSub messages from external platforms will not need to have a forward historian running on the source platform to forward PubSub messages to the interested destination platforms; The VIP router will now do all the work. It shall use the Routing Service to internally manage connections with external VOLTTRON platforms and use the PubSubService for the actual inter-platform PubSub communication.

For future:

This specification will need to be extended to support PubSub communication between platforms that are multiple hops away. The VIP router of each platform shall need to maintain a routing table and use it to forward pubsub messages to subscribed platforms that are multiple hops away. The routing table shall contain shortest path to each destination platform.

## **Functional Capabilities**

1. Each VOLTTRON platform shall have a list of other VOLTTRON platforms that it has to connect to in a config file.
2. Routing Service of each platform connects to other platforms on startup.
3. The Routing Service in each platform is responsible for connecting to (and also initiating reconnection if required), monitoring and disconnecting from each external platform. The function of the Routing Service is explained in detail in the Routing Service section.
4. Platform to platform PubSub communication shall be using VIP protocol with the subsystem frame set to “pub-sub”.
5. The PubSubService of each VOLTTRON platform shall maintain a list of local and external subscriptions.
6. Each VIP router sends its list of external subscriptions to other connected platforms in the following cases:
  - a. On startup
  - b. When a new subscription is added
  - c. When an existing subscription is removed
  - d. When a new platform gets connected
7. When a remote platform disconnection is detected, all stale subscriptions related to that platform shall be removed.
8. Whenever an agent publishes a message to a specific topic, the PubSubService on the local platform first checks the topic against its list of local subscriptions. If a local subscription exists, it sends the publish message to corresponding local subscribers.
9. The PubSubService shall also check the topic against list of external subscriptions. If an external subscription exists, it shall use the Routing Service to send the publish message to the corresponding external platform.
10. Whenever a router receives messages from other platform, it shall check the destination platform in the incoming message.
  - a. If the destination platform is the local platform, it hand overs the publish message to the PubSubService which checks the topic against list of external subscriptions. If an external subscription matches, the PubSubService forwards the message to all the local subscribers subscribed to that topic.
  - b. If the destination platform is not the local platform, it discards the message.

## Routing Service

1. The Routing Service shall maintain connection status (CONNECTING, CONNECTED, DISCONNECTED etc.) for each external platform.
2. In order to establish connection with an external VOLTRON platform, the server key of the remote platform is needed. The Routing Service shall connect to an external platform once it obtains the server key for that platform from the KeyDiscoveryService.
3. The Routing Service shall exchange “hello”/”welcome” handshake messages with the newly connected remote platform to confirm the connection. It shall use VIP protocol with the subsystem frame set to “routing\_table” for the handshake messages.
4. Routing Service shall monitor the connection status and inform the PubSubService whenever a remote platform gets connected/disconnected.

For Future:

1. Each VIP router shall exchange its routing table with its connected platforms on startup and whenever a new platform gets connected or disconnected.
2. The router shall go through each entry in the routing table that it received from other platforms and calculate the shortest, most stable path to each remote platform. It then sends the updated routing table to other platforms for adjustments in the forwarding paths (in their local routing table) if any.
3. Whenever a VIP router detects a new connection, it adds an entry into the routing table and sends updated routing table to its neighboring platforms. Each router in the other platforms shall update and re-calculate the forwarding paths in its local routing table and forward to rest of the platforms.
4. Similarly, whenever a VIP router detects a remote platform disconnection, it deletes the entry in the routing table for that platform and forwards the routing table to other platforms to do the same.

## KeyDiscovery Service

1. Each platform tries to obtain the platform discovery information - platform name, *VIP address* and server key of remote VOLTRON platforms through HTTP discovery service at startup.
2. If unsuccessful, it shall make regular attempts to obtain discovery information until successful.
3. The platform discovery information shall then be sent to the Routing Service using VIP protocol with subsystem frame set to “routing\_table”.

## Messages for Routing Service

Below are example messages that are applicable to the Routing Service.

- Message sent by KeyDiscovery Service containing the platform discovery information (platform name, VIP address and server key) of a remote platform

+--+ 	Empty recipient frame
+--+-----+   VIP1	Signature frame
+--+-----+ 	Empty user ID frame
+--+-----+   0001	Request ID, <b>for</b> example "0001"

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```

+-----+
| routing_table | Subsystem, "routing_table"
+-----+-----+
| normalmode_platform_connection | Type of operation, "normalmode_
↪platform_connection"
+-----+
| platform discovery information |
| of external platform | platform name, VIP address and server_
↪key of external platform
+-----+
| platform name | Remote platform for which the server key belongs_
↪to.
+-----+

```

Handshake messages between two newly connected external VOLTTRON platform to confirm successful connection.

- Message from initiating platform

```

+-+
| | Empty recipient frame
+-+-----+
| VIP1 | Signature frame
+-+-----+
| | Empty user ID frame
+-+-----+
| 0001 | Request ID, for example "0001"
+-----++
| routing_table | Subsystem, "routing_table"
+-----+
| hello | Operation, "hello"
+-----+
| hello | Hello handshake request frame
+-----+
| platform name | Platform initiating a "hello"
+-----+

```

- Reply message from the destination platform

```

+-+
| | Empty recipient frame
+-+-----+
| VIP1 | Signature frame
+-+-----+
| | Empty user ID frame
+-+-----+
| 0001 | Request ID, for example "0001"
+-----++
| routing_table | Subsystem, "routing_table"
+-----+
| hello | Operation, "hello"
+-----+
| welcome | Welcome handshake reply frame
+-----+
| platform name | Platform sending reply to "hello"
+-----+

```

## Messages for PubSub communication

The VIP routers of each platform shall send PubSub messages between platforms using VIP protocol message semantics. Below is an example of external subscription list message sent by VOLTRON platform V1 router to VOLTRON platform V2.

```

+-+
| |                               Empty recipient frame
+-+-----+
| VIP1 |                           Signature frame
+-+-----+
|V1 user id |                       Empty user ID frame
+-+-----+
| 0001 |                           Request ID, for example "0001"
+-+-----+
| pubsub |                         Subsystem, "pubsub"
+-+-----+
| external_list |                   Operation, "external_list" in this case
+-+-----+
| List of |                         Subscriptions dictionary consisting of VOLTRON platform id and
| subscriptions |                  ↪list of topics as
+-+-----+                               key - value pairings, for example: { "V1": ["devices/rtu3"]}

```

This shows an example of an external publish message sent by the router of VOLTRON platform V2 to VOLTRON platform V1.

```

+-+
| |                               Empty recipient frame
+-+-----+
| VIP1 |                           Signature frame
+-+-----+
|V1 user id |                       Empty user ID frame
+-+-----+
| 0001 |                           Request ID, for example "0001"
+-+-----+
| pubsub |                         Subsystem, "pubsub"
+-+-----+
| external_publish |                 Operation, "external_publish" in this case
+-+-----+
| topic |                           Message topic
+-+-----+
| publish message |                 Actual publish message frame
+-+-----+

```

## API

### Methods for Routing Service

- *external\_route( )* - This method receives message frames from external platforms, checks the subsystem frame and redirects to appropriate subsystem (routing table, pubsub) handler. It shall run within a separate thread and get executed whenever there is a new incoming message from other platforms.
- *setup( )* - This method initiates socket connections with all the external VOLTRON platforms configured in the config file. It also starts monitor thread to monitor connections with external platforms.

- *handle\_subsystem( frames )* - Routing Service subsystem handler to handle serverkey message from KeyDiscoveryService and “hello/welcome” handshake message from external platforms.
- *send\_external( instance\_name, frames )* - This method sends input message to specified VOLTTRON platform/instance.
- *register( type, handler )* - Register method for PubSubService to register for connection and disconnection events.
- *disconnect\_external\_instances( instance\_name )* - Disconnect from specified VOLTTRON platform.
- *close\_external\_connections( )* - Disconnect from all external VOLTTRON platforms.
- *get\_connected\_platforms( )* - Return list of connected platforms.

### Methods for PubSubService

- *external\_platform\_add( instance\_name )* - Send external subscription list to newly connected external VOLTTRON platform.
- *external\_platform\_drop( instance\_name )* - Remove all subscriptions for the specified VOLTTRON platform
- *update\_external\_subscriptions( frames )* - Store/Update list of external subscriptions as per the subscription list provided in the message frame.
- *\_distribute\_external( frames )* - Publish the message all the external platforms that have subscribed to the topic. It uses *send\_external\_pubsub\_message()* of router to send out the message.
- *external\_to\_local\_publish( frames )* - This method retrieves actual message from the message frame, checks the message topic against list of external subscriptions and sends the message to corresponding subscribed agents.

### Methods for agent pubsub subsystem

To subscribe to topics from a remote platform, the subscribing agent has to add an additional input parameter - *all\_platforms* to the pubsub subscribe method.

- *subscribe(peer, prefix, callback, bus=”, all\_platforms=False)* - The existing ‘subscribe’ method is modified to include optional keyword argument - ‘all\_platforms’. If ‘all\_platforms’ is set to True, the agent is subscribing to topic from local publisher and from external platform publishers.

```
self.vip.pubsub.subscribe('pubsub', 'foo', self.on_match, all_platforms=True)
```

There is no change in the publish method of PubSub subsystem. If all the configurations are correct and the publisher agent on the remote platform is publishing message to topic=`foo`, then the subscriber agent will start receiving those messages.

### Multi-Platform RPC Communication

Multi-Platform RPC communication allows an agent on one platform to make RPC call on an agent in another platform without having to setup connection to the remote platform directly. The connection will be internally managed by the VOLTTRON platform router module. Please refer here [Multi-Platform Communication Setup](#) for more details regarding setting up of Multi-Platform connections.



## Calling External Platform RPC Method

If an agent in one platform wants to use an exported RPC method of an agent in another platform, it has to provide the platform name of the remote platform when using RPC subsystem call/notify method.

Here is an example:

```
self.vip.rpc.call(peer, 'say_hello', 'Bob', external_platform='platform2').get()
self.vip.rpc.notify(peer, 'ready', external_platform='platform2')
```

Here, 'platform2' is the platform name of the remote platform.

## Distributed RabbitMQ Brokers

RabbitMQ allows multiple distributed RabbitMQ brokers to be connected in three different ways - with clustering, with federation and using shovel. We take advantage of these built-in plugins for multi-platform VOLTRON communication. For more information about the differences between clustering, federation, and shovel, please refer to the RabbitMQ documentation on [Distributed RabbitMQ brokers](#).

### Clustering

Clustering connects multiple brokers residing in multiple machines to form a single logical broker. It is used in applications where tight coupling is necessary i.e, where each node shares the data and knows the state of all other nodes in the cluster. A new node can connect to the cluster through a peer discovery mechanism if configured to do so in the RabbitMQ config file. For all the nodes to be connected together in a cluster, it is necessary for them to share the same Erlang cookie and be reachable through it's DNS hostname. A client can connect to any one of the nodes in the cluster and perform any operation (to send/receive messages from other nodes etc.), the nodes will route the operation internally. In case of a node failure, clients should be able to reconnect to a different node, recover their topology and continue operation.

---

**Note:** This feature is not integrated into VOLTRON, but we hope to support it in the future. For more detailed information about clustering, please refer to RabbitMQ documentation on the [Clustering plugin](#).

---

### Federation

Federation plugin is used in applications that does not require as much of tight coupling as clustering. Federation has several useful features:

- Loose coupling - The federation plugin can transmit messages between brokers (or clusters) in different administrative domains:
  - they may have different users and virtual hosts;
  - they may run on different versions of RabbitMQ and Erlang.
- WAN friendliness - They can tolerate network intermittent connectivity.
- Specificity - Not everything needs to be federated ( made available to other brokers ); There can be local-only components.
- Scalability - Federation does not require  $O(n^2)$  connections for  $n$  brokers, so it scales better.

The federation plugin allows you to make exchanges and queues *federated*. A federated exchange or queue can receive messages from one or more upstreams (remote exchanges and queues on other brokers). A federated exchange can route messages published upstream to a local queue. A federated queue lets a local consumer receive messages from an upstream queue.

Before we move forward, let's define upstream and downstream servers.

- Upstream server - The node that is publishing some message of interest
- Downstream server - The node connected to a different broker that wants to receive messages from the upstream server

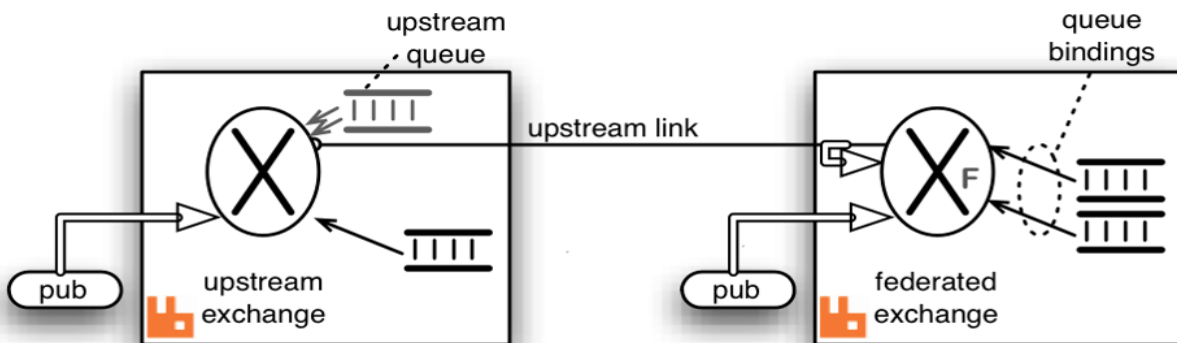
A federation link needs to be established from downstream server to the upstream server. The data flows in single direction from upstream server to downstream server. For bi-directional data flow, we would need to create federation links on both the nodes.

We can receive messages from upstream server to downstream server by either making an exchange or a queue *federated*.

For more detailed information about federation, please refer to RabbitMQ documentation [Federation plugin](#).

## Federated Exchange

When we make an exchange on the downstream server *federated*, the messages published to the upstream exchanges are copied to the federated exchange, as though they were published directly to it.



The above figure explains message transfer using federated exchange. The box on the right acts as the downstream server and the box on the left acts as the upstream server. A federation/upstream link is established between the downstream server and the upstream server by using the federation management plugin.

An exchange on the downstream server is made *federated* using federation policy configuration. The federated exchange only receives the messages for which it has subscribed. An upstream queue is created on the upstream server with a binding key same as subscription made on the federated exchange. For example, if an upstream server is publishing messages with binding key “foo” and a client on the downstream server is interested in receiving messages of the binding key “foo”, then it creates a queue and binds the queue to the federated with the same binding key. This binding is sent to the upstream and the upstream queue binds to the upstream exchange with that key.

Publications to either exchange may be received by queues bound to the federated exchange, but publications directly to the federated exchange cannot be received by queues bound to the upstream exchange.

For more information about federated exchanges and different federation topologies, please read about [Federated Exchanges](#).

## Federated Queue

Federated queue provides a way of balancing load of a single queue across nodes or clusters. A federated queue lets a local consumer receive messages from an upstream queue. A typical use would be to have the same “logical” queue distributed over many brokers. Such a logical distributed queue is capable of having higher capacity than a single queue. A federated queue links to other upstream queues.

A federation or upstream link needs to be created like before and a federated queue needs to be setup on the downstream server using federation policy configuration. The federated queue will only retrieve messages when it has run out of messages locally, it has consumers that need messages, and the upstream queue has “spare” messages that are not being consumed.

For more information about federated queues, please read about [Federated Queues](#).

## Shovel

The Shovel plugin allows you to reliably and continually move messages from a source in one broker to destination in another broker. A shovel behaves like a well-written client application in that it:

- connects to its source and destination broker
- consumes messages from the source queue
- re-publishes messages to the destination if the messages match the routing key.

The Shovel plugin uses an Erlang client under the hood. In the case of shovel, apart from configuring the hostname, port and virtual host of the remote node, we will also have to provide a list of routing keys that we want to forward to the remote node. The primary advantages of shovels are:

- Loose coupling - A shovel can move messages between brokers (or clusters) in different administrative domains:
  - \* they may have different users and virtual hosts;
  - \* they may run on different versions of RabbitMQ and Erlang.
- WAN friendliness - They can tolerate network intermittent connectivity.

Shovels are also useful in cases where one of the nodes is behind NAT. We can setup shovel on the node behind NAT to forward messages to the node outside NAT. Shovels do not allow you to adapt to subscriptions like a federation link and we need to create a new shovel per subscription.

For more detailed information about shovel, please refer to RabbitMQ documentation on the [Shovel plugin](#).

## Agent communication to Remote RabbitMQ instance

Communication between two RabbitMQ based VOLTRON instances must be done using SSL certificate based authentication. Non SSL based authentication will not be supported for communication to remote RabbitMQ based VOLTRON instances. A VOLTRON instance that wants to communicate with a remote instance should first request a SSL certificate that is signed by the remote instance. To facilitate this process there will be a web based server API for requesting, listing, approving and denying certificate requests. This api will be exposed via the PlatformWeb-Service and will be available to any RabbitMQ based VOLTRON instance with SSL enabled. This API will be tested and used in the following agents:

- ForwarderAgent
- DataPuller
- VolttronCentralPlatform

For the following document we will assume we have two instances a local-instance and remote-volttron-instance. The remote-volttron-instance will be configured to allow certificate requests to be sent to it from the local-instance. A remote-agent running in local-instance will attempt to establish a connection to the remote-volttron-instance

## Configuration

Both `volttron-server` and `volttron-client` must be configured for RabbitMQ message bus with SSL using the step described at [Installing Volttron](#).

In addition the `remote-volttron-instance` configuration file must have a `https` `bind-web-address` specified in the instance config file. Below is an example config file with `bind-web-address`. Restart `volttron` after editing the config file

```
[volttron]
message-bus = rmq
vip-address = tcp://127.0.0.1:22916
bind-web-address = https://volttron1:8443
instance-name = volttron1
```

By default the `bind-web-address` parameter will use the PlatformWebService agent's certificate and private key. Both private and public key are necessary in order to bind the port to the socket for incoming connections. This key pair is auto generated for RabbitMQ based VOLTTRON at the time of platform startup. Users can provide a different certificate and private key to be used for the `bind-web-address` by specifying `web-ssl-cert` and `web-ssl-key` in the config file. Below is an example config file with the additional entries

```
[volttron]
message-bus = rmq
vip-address = tcp://127.0.0.1:22916
bind-web-address = https://volttron1:8443
instance-name = volttron1
web-ssl-cert = /path/to/cert/cert.pem
web-ssl-key = /path/to/cert/key.pem
```

---

### Note:

- The `/etc/hosts` file should be modified in order for the dns name to be used for the bound address.
- 

## remote-agent on local-instance

The `auth` subsystem of the `volttron` architecture is how a remote-agent on local instance will connect to the remote `volttron` instance.

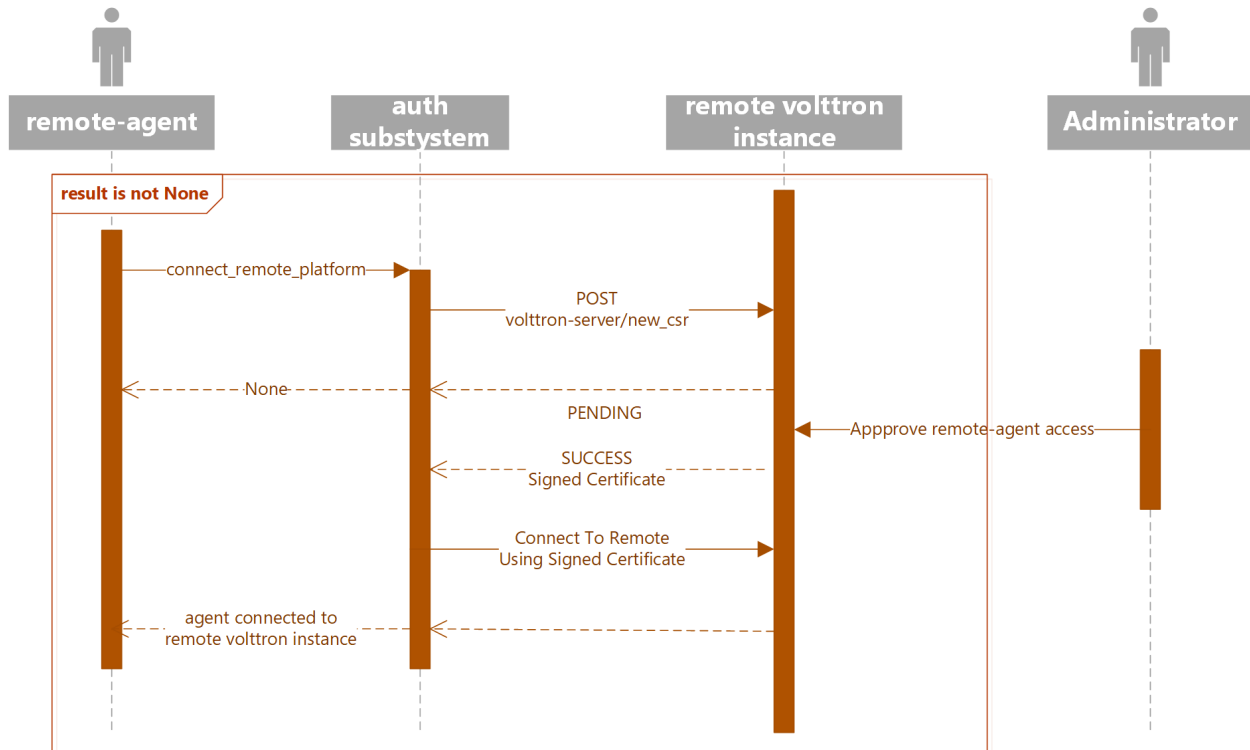
The following is a code snippet from the remote-agent to connect to the remote `volttron` instance.

```
...
value = self.vip.auth.connect_remote_platform(address)
```

The above function call will return an agent that connects to the remote instance only after the request is approved by an administrator of the remote instance. It is up to the agent to repeat calling `connect_remote_platform` periodically until an agent object is obtained.

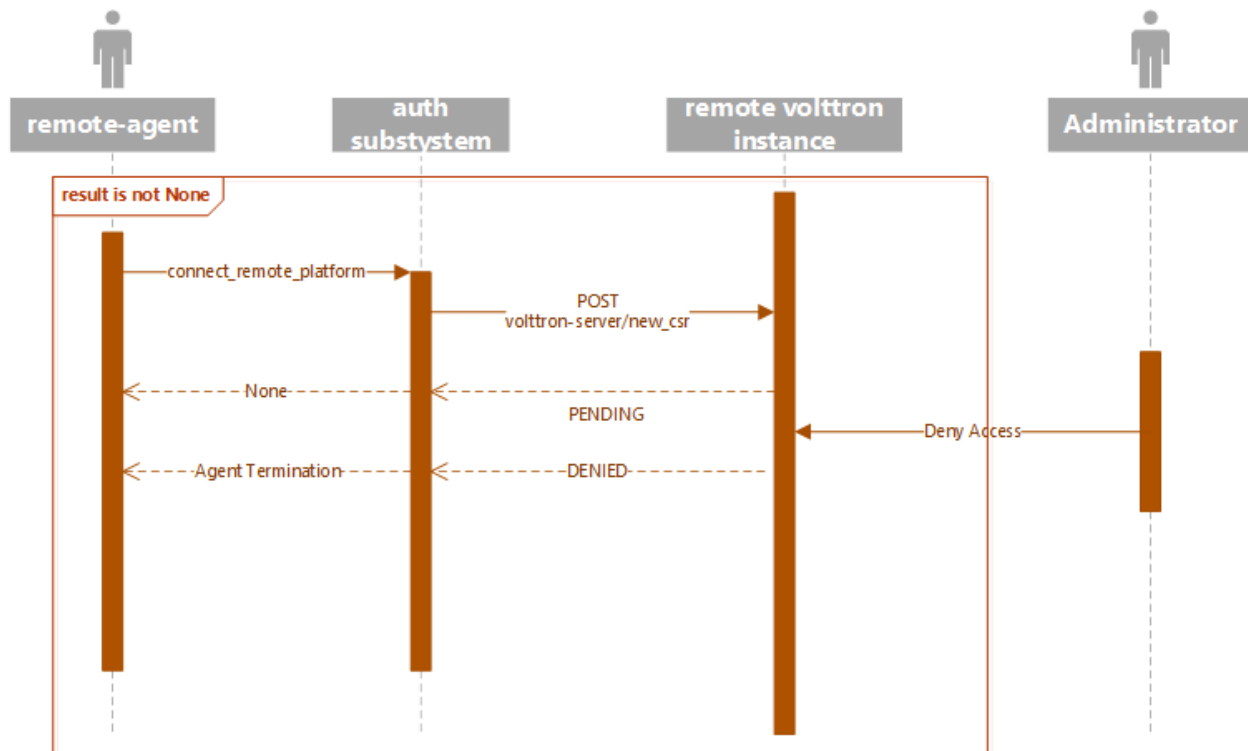
## Approving a CSR Request

The following diagram shows the sequence of events when an access request is approved by the administrator of remote volttron instance. In this case, the volttron-client agent will get a Agent object that is connected to the remote instance. The diagram shows the client agent repeating the call to `connect_remote_platform` until the return value is not None.



## Denying a CSR Request

The following diagram shows the sequence of events when an access request is denied by the administrator. The client agent repeats the call to `connect_remote_platform` until the return value is not None. When the remote instance's administrator denies a access request, the auth subsystem will raise an alert and shutdown the agent.



Follow walk-through in [Multi-Platform Multi-Bus Walk-through](#) for setting up different combinations of multi-bus multi-platform setup using CSR.

## 2.5 VOLTTRON Control

The base platform functionality focuses on the agent lifecycle, management of the platform itself, and security. This section describes how to use the commands included with VOLTTRON to configure and control the platform, agents and drivers.

### 2.5.1 Platform Commands

VOLTTRON files for a platform instance are stored under a single directory known as the VOLTTRON home. This home directory is set via the `VOLTTRON_HOME` environment variable and defaults to `~/ .volttron`. Multiple instances of the platform may exist under the same account on a system by setting the `VOLTTRON_HOME` environment variable appropriately before executing VOLTTRON commands.

VOLTTRON's configuration file uses a modified INI format where section names are command names for which the settings in the section apply. Settings before the first section are considered global and will be used by all commands for which the settings are valid. Settings keys are long options (with or without the opening “-”) and are followed by a colon (:) or equal (=) and then the value. Boolean options need not include the separator or value, but may specify a value of 1, yes, or true for *true* or 0, no, or false for *false*.

It is best practice to use the `vcfg` command prior to starting VOLTTRON for the first time to populate the configuration file for your deployment. If VOLTTRON is started without having run `vcfg`, a default config will be created in `$VOLTRON_HOME/config`. The following is an example configuration after running `vcfg`:

```
[volttron]
message-bus = rmq
```

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```
instance-name = volttron1
vip-address = tcp://127.0.0.1:22916
bind-web-address = https://<hostname>:8443
volttron-central-address = https://<hostname>:8443
```

where:

- **message-bus** - Indicates message bus to be used. Valid values are `zmq` and `rmq`
- **instance-name** - Name of the VOLTTTRON instance. This has to be unique if multiple instances need to be connected together
- **vip-address** - *VIP address* of the VOLTTTRON instance. It contains the IP address and port number (default port number is 22916)
- **bind-web-address** - Optional parameter, only needed if VOLTTTRON instance needs a web interface
- **volttron-central-address** - Optional parameter. Web address of VOLTTTRON Central agent

---

#### Note:

```
env/bin/volttron -c <config> -l volttron.log &
```

---

Below is a compendium of commands which can be used to operate the VOLTTTRON Platform from the command line interface.

### VOLTTTRON Platform Command

The main VOLTTTRON platform command is `volttron`, however this command is seldom run as-is. In most cases the user will want to run the platform in the background. In a limited number of cases, the user will wish to enable verbose logging. A typical command to start the platform is:

---

#### Note:

- All commands and sub-commands have help available with `-h` or `--help`
  - Additional configuration files may be specified with `-c` or `-config`
  - To specify a log file, use `-l` or `--log`
  - The ampersand (`&`) can be added to the end of the command to run the platform in the background, freeing the open shell to be used for additional commands.
- 

```
volttron -vv -l volttron.log &
```

### volttron Optional Arguments

- **-c FILE, --config FILE** - Start the platform using the configuration from the provided FILE
- **-l FILE, --log FILE** - send log output to FILE instead of standard output/error
- **-L FILE, --log-config FILE** - Use the configuration from FILE for VOLTTRON platform logging
- **--log-level LOGGER:LEVEL** - override default logger logging level (*INFO, DEBUG, WARNING, ERROR, CRITICAL, NOTSET*)
- **--monitor** - monitor and log connections (implies verbose logging mode `-v`)
- **-q, --quiet** - decrease logger verbosity; may be used multiple times to further reduce logging (i.e. `-qq`)
- **-v, --verbose** - increase logger verbosity; may be used multiple times (i.e. `-vv`)
- **--verbosity LEVEL** - set logger verbosity level
- **-h, --help** - show this help message and exit
- **--version** - show program's version number and exit
- **--message-bus MESSAGE\_BUS** - set message bus to be used. valid values are `zmq` and `rmq`

---

**Note:** Visit the Python 3 logging documentation for more information about [logging and verbosity levels](#).

---

### Agent Options

- **--autostart** - automatically start enabled agents and services after platform startup
- **--vip-address ZMQADDR** - ZeroMQ URL to bind for VIP connections
- **--vip-local-address ZMQADDR** - ZeroMQ URL to bind for local agent VIP connections
- **--bind-web-address BINDWEBADDR** - Bind a web server to the specified ip:port passed
- **--web-ca-cert CAFE** - If using self-signed certificates, this variable will be set globally to allow requests to be able to correctly reach the webserver without having to specify verify in all calls.
- **--web-secret-key WEB\_SECRET\_KEY** - Secret key to be used instead of HTTPS based authentication.
- **--web-ssl-key KEYFILE** - SSL key file for using https with the VOLTTRON server
- **--web-ssl-cert CERTFILE** - SSL certificate file for using https with the VOLTTRON server
- **--volttron-central-address VOLTTRON\_CENTRAL\_ADDRESS** - The web address of a VOLTTRON Central install instance.
- **--volttron-central-serverkey VOLTTRON\_CENTRAL\_SERVERKEY** - The server key of the VOLTTRON Central being connected to.
- **--instance-name INSTANCE\_NAME** - The name of the instance that will be reported to VOLTTRON Central.
- **--msgdebug** - Route all messages to an instance of the MessageDebug agent while debugging.
- **--setup-mode** - Setup mode flag for setting up authorization of external platforms.
- **--volttron-central-rmq-address VOLTTRON\_CENTRAL\_RMQ\_ADDRESS** - The AMQP address of a VOLTTRON Central install instance
- **--agent-monitor-frequency AGENT\_MONITOR\_FREQUENCY** - How often should the platform check for crashed agents and attempt to restart. Units=seconds. Default=600



- **–agent-isolation-mode AGENT\_ISOLATION\_MODE** - Require that agents run with their own users (this requires running scripts/secure\_user\_permissions.sh as sudo)

**Warning:** Certain options alter some basic behaviors of the platform, such as *–agent-isolation-mode* which causes the platform to run each agent using its own Unix user to spawn the process. Please view the documentation for each feature to understand its implications before choosing to run the platform in that fashion.

## volttron-ctl Commands

*volttron-ctl* is used to issue commands to the platform from the command line. Through *volttron-ctl* it is possible to install and removed agents, start and stop agents, manage the configuration store, get the platform status, and shutdown the platform.

In more recent versions of VOLTRON, the commands *vcctl*, *vpkg*, and *vcfg* have been added to be used as a stand-in for *volttron-ctl*, *volttron-pkg*, and *volttron-cfg* in the CLI. The VOLTRON documentation will often use this convention.

**Warning:** *vcctl* creates a special temporary agent to communicate with the platform with a specific *VIP Identity*, thus multiple instances of *vcctl* cannot run at the same time. Attempting to do so will result in a conflicting identity error.

Use *vcctl* with one or more of the following arguments, or below sub-commands:

## vcctl Optional Arguments

- **–c FILE, –config FILE** - Start the platform using the configuration from the provided FILE
- **–debug** - show tracebacks for errors rather than a brief message
- **–t SECS, –timeout SECS** - timeout in seconds for remote calls (default: 60)
- **–msgdebug MSGDEBUG** - route all messages to an agent while debugging
- **–vip-address ZMQADDR** - ZeroMQ URL to bind for VIP connections
- **–l FILE, –log FILE** - send log output to FILE instead of standard output/error
- **–L FILE, –log-config FILE** - Use the configuration from FILE for VOLTRON platform logging
- **–q, –quiet** - decrease logger verbosity; may be used multiple times to further reduce logging (i.e. –qq)
- **–v, –verbose** - increase logger verbosity; may be used multiple times (i.e. –vv)
- **–verbosity LEVEL** - set logger verbosity level (this level is a numeric level co
- **–json** - format output to json
- **–h, –help** - show this help message and exit

## Commands

- **install** - install an agent from wheel or from an agent package directory

---

**Note:** If `--agent-config` is not specified then a default config, `config.json` or `config.yml` file in the agent directory will be used as configuration. If none present then no configuration file will be loaded.

---

- **tag AGENT TAG** - set, show, or remove agent tag for a particular agent
- **remove AGENT** - disconnect specified agent from the platform and remove its installed agent package from `VOLTTRON_HOME`
- **peerlist** - list the peers connected to the platform
- **list** - list installed agents
- **status** - show status of installed agents
- **health AGENT** - show agent health as JSON
- **clear** - clear status of defunct agents
- **enable AGENT** - enable agent to start automatically
- **disable AGENT** - prevent agent from start automatically
- **start AGENT** - start installed agent
- **stop AGENT** - stop agent
- **restart AGENT** - restart agent
- **run PATH** - start any agent by path
- **upgrade AGENT WHEEL** - upgrade agent from wheel file

---

**Note:** Does *NOT* upgrade agents from the agent's code directory, requires agent wheel file.

---

- **rpc** - rpc controls
- **certs OPTIONS** - manage certificate creation
- **auth OPTIONS** - manage authorization entries and encryption keys
- **config OPTIONS** - manage the platform configuration store
- **shutdown** - stop all agents (providing the `--platform` optional argument causes the platform to be shutdown)
- **send WHEEL** - send agent and start on a remote platform
- **stats** - manage router message statistics tracking
- **rabbitmq OPTIONS** - manage rabbitmq

---

**Note:** For each command with *OPTIONS* in the description, additional options are required to make use of the command. For each, please visit the corresponding section of documentation.

- [Auth](#)
- [Certs](#)
- [Config](#)

- *RPC*
- 

**Note:** Visit the Python 3 logging documentation for more information about [logging and verbosity levels](#).

---

### vctl auth Subcommands

- **add** - add new authentication record
- **add-group** - associate a group name with a set of roles
- **add-known-host** - add server public key to known-hosts file
- **add-role** - associate a role name with a set of capabilities
- **keypair** - generate CurveMQ keys for encrypting VIP connections
- **list** - list authentication records
- **list-groups** - show list of group names and their sets of roles
- **list-known-hosts** - list entries from known-hosts file
- **list-roles** - show list of role names and their sets of capabilities
- **publickey** - show public key for each agent
- **remove** - removes one or more authentication records by indices
- **remove-group** - disassociate a group name from a set of roles
- **remove-known-host** - remove entry from known-hosts file
- **remove-role** - disassociate a role name from a set of capabilities
- **serverkey** - show the serverkey for the instance
- **update** - updates one authentication record by index
- **update-group** - update group to include (or remove) given roles
- **update-role** - update role to include (or remove) given capabilities

### vctl certs Subcommands

- **create-ssl-keypair** - create a SSL keypair
- **export-pkcs12** - create a PKCS12 encoded file containing private and public key from an agent. This function is also used to create a Java key store using a p12 file.

### vctl config Subcommands

- **store** AGENT CONFIG\_NAME CONFIG PATH - store a configuration file in agent's config store (parses JSON by default, use `-csv` for CSV files)
- **edit** AGENT CONFIG\_NAME - edit a configuration. (opens nano by default, respects EDITOR env variable)
- **delete** AGENT CONFIG\_NAME - delete a configuration from agent's config store (`-all` removes all configs for the agent)
- **list** AGENT - list stores or configurations in a store
- **get** AGENT CONFIG\_NAME - get the contents of a configuration

### vctl rpc Subcommands

- **code** - shows how to use RPC call in other agents
- **list** - lists all agents and their RPC methods

### vpkg Commands

*vpkg* is the VOLTTRON command used to manage agent packages (code directories and wheel files) including creating initializing new agent code directories, creating agent wheels, etc.

### vpkg Optional Arguments

- **-h, --help** - show this help message and exit
- **-l FILE, --log FILE** - send log output to FILE instead of standard output/error
- **-L FILE, --log-config FILE** - Use the configuration from FILE for VOLTTRON platform logging
- **-q, --quiet** - decrease logger verbosity; may be used multiple times to further reduce logging (i.e. `-qq`)
- **-v, --verbose** - increase logger verbosity; may be used multiple times (i.e. `-vv`)
- **--verbosity LEVEL** - set logger verbosity level

### Subcommands

- **package** - Create agent package (whl) from a directory
- **init** - Create new agent code package from a template. Will prompt for additional metadata.
- **repackage** - Creates agent package from a currently installed agent.
- **configure** - Add a configuration file to an agent package

## volttron-cfg Commands

*volttron-cfg* (*vcfg*) is a tool aimed at making it easier to get up and running with VOLTTRON and a handful of agents. Running the tool without any arguments will start a *wizard* with a walk through for setting up instance configuration options and available agents. If only individual agents need to be configured they can be listed at the command line.

**Note:** For a detailed description of the VOLTTRON configuration file and *vcfg* wizard, as well as example usage, view the [platform configuration](#) docs.

## vcfg Optional Arguments

- **-h, --help** - show this help message and exit
- **-v, --verbose** - increase logger verbosity; may be used multiple times (i.e. `-vv`)
- **--vhome VHOME** Path to volttron home
- **--instance-name INSTANCE\_NAME** Name of this volttron instance
- **--list-agents** - list configurable agents

```
Agents available to configure:
  listener
  platform_driver
  platform_historian
  vc
  vcp
```

- **--agent AGENT [AGENT ...]** - configure listed agents
- **--rabbitmq RABBITMQ [RABBITMQ ...]** - Configure RabbitMQ for single instance, federation, or shovel either based on configuration file in YAML format or providing details when prompted. Usage:

```
vcfg --rabbitmq single|federation|shovel [rabbitmq config file]
```

- **--agent-isolation-mode** Require that agents run with their own users (this requires running `scripts/secure_user_permissions.sh` as `sudo`)

**Warning:** The secure agent users significantly changes the operation of agents on the platform, please read the secure agent users documentation before using this feature.

## 2.5.2 Agent Control Commands

The VOLTTRON platform has several commands for controlling the lifecycle of agents. This page discusses how to use them, for details of operation please see [Platform Configuration](#)

**Note:** These examples assume the VOLTTRON environment has been activated

```
. env/bin/activate
```

If not activating the VOLTTRON virtual environment, add “bin/” to all commands

## Agent Packaging

The *vpkg* command is used for packaging and configuring agents. It is not necessary to have the platform running to use this command. The platform uses [Python Wheel](#) for its packaging and follows the [Wheel naming convention](#).

To create an agent package, call:

```
vpkg <Agent Dir>
```

For instance: `vpkg package examples/ListenerAgent`

The package command uses the *setup.py* in the agent directory to create the package. The name and version number portion of the Wheel filename come from this. The resulting wheels are created at *~/.volttron/packaged*. For example: *~/.volttron/packaged/listeneragent-3.0-py2-none-any.whl*.

## Agent Configuration

Agent packages are configured with:

```
vpkg configure <AgentPackage> <ConfigFile>
```

It is suggested that this file use JSON formatting but the agent can be written to interpret any format it requires. The configuration of a particular agent is opaque to the VOLTTRON platform. The location of the agent config file is passed as an environmental variable *AGENT\_CONFIG* which the provided utilities read in and pass to the agent.

An example config file passing in some parameters:

```
{
    "agentid": "listener1",
    "message": "hello"
}
```

## Agent Installation and Removal

Agents are installed into the platform using:

```
vctl install <package>
```

When agents are installed onto a platform, it creates a uuid for that instance of an agent. This allows multiple instances of the same agent package to be installed on the platform.

This allows the user to refer to the agent with `--tag <tag>` instead of the uuid when issuing commands. This tag can also distinguish instances of an agent from each other.

A stopped agent can be removed with:

- `vctl remove <AGENT_UUID>`
- `vctl remove --tag <AGENT_TAG>`
- `vctl remove --name <AGENT_NAME>`

## Tagging Agents

Agents can be tagged as they are installed with:

```
vctl install <TAG>=<AGENT_PACKAGE>
```

Agents can be tagged after installation with:

```
vctl tag <AGENT_UUID> <TAG>
```

Agents can be “tagged” to provide a meaningful user defined way to reference the agent instead of the uuid or the name. This allows users to differentiate between instances of agents which use the same codebase but are configured differently.

## Example

A user installs two instances of the Listener Agent, tagged with *listener1* and *listener2* respectively:

```
python scripts/install-agent.py -s examples/ListenerAgent --tag listener1
python scripts/install-agent.py -s examples/ListenerAgent --tag listener2
```

`vctl status` displays:

AGENT	IDENTITY	TAG	STATUS	HEALTH
a listeneragent-3.3	listeneragent-3.3_2	listener2		
6 listeneragent-3.3	listeneragent-3.3_1	listener1		

Commands which operate off an agent’s UUID can optionally operate off the tag by using “--tag “. This can use wild-cards to catch multiple agents at once. For example, `vctl start --tag listener*` will start both *listener1* and *listener2*.

**Warning:** Removal by tag and name potentially allows multiple agents to be removed at once and should be used with caution. A “-f” option is required to delete more than one agent at a time.

## Agent Control

### Starting and Stopping an Agent

Agent that are installed in the platform can be launched with the *start* command. By default this operates off the agent’s UUID but can be used with `--tag` or `--name` to launch agents by those attributes.

This can allow multiple agents to be started at once. For instance: `vctl start --name myagent-0.1` would start all instances of that agent regardless of their uuid, tag, or configuration information.

After an agent is started, it will show up in *Agent Status* as “running” with a process id.

Similarly, `volttron-ctl stop <UUID>` can also operate off the tag and name of agent(s). After an agent is stopped, it will show an exit code of 0 in *Agent Status*

## Running an agent

For testing purposes, an agent package not installed in the platform can be run by using:

```
vctl run <PACKAGE>
```

## Agent Status

`vctl list` shows the agents which have been installed on the platform along with their `uuid`, associated *tag* and *priority*.

- *uuid* is the first column of the display and is displayed as the shorted unique portion. Using this portion, agents can be started, stopped, removed, etc.
- *AGENT* is the “name” of this agent based on the name of the wheel file which was installed. Agents can be controlled with this using `--name`.

---

**Note:** If multiple instances of a wheel are installed they will all have the same name and can be controlled as a group.

---

- *IDENTITY* is the VIP platform identity assigned to the agent which can be used to make RPC calls, etc. with the platform
- *TAG* is a user provided tag which makes it simpler to track and refer to agents. `--tag <tag>` can be used in most agent control commands instead of the *UUID* to control that agent or multiple agents with a pattern.
- *PRI* is the priority for agents which have been “enabled” using the `vctl enable` command. When enabled, agents will be automatically started in priority order along with the platform.

	AGENT	IDENTITY	TAG	PRI
a	listeneragent-3.3	listeneragent-3.3_2	listener2	
6	listeneragent-3.3	listeneragent-3.3_1	listener1	

The `vctl status` command shows the list of installed agents and whether they are running or have exited.

	AGENT	IDENTITY	TAG	STATUS	HEALTH
a	listeneragent-3.3	listeneragent-3.3_2	listener2	running [12872]	GOOD
6	listeneragent-3.3	listeneragent-3.3_1	listener1	running [12873]	GOOD

- *AGENT*, *IDENTITY* and *TAG* are the same as in the `vctl list` command
- *STATUS* is the current condition of the agent. If the agent is currently executing, it has “running” and the process id of the agent. If the agent is not running, the exit code is shown.
- *HEALTH* represents the current state of the agent. *GOOD* health is displayed while the agent is operating as expected. If an agent enters an error state the health will display as *BAD*

To get more information about a current agents’ health one can execute

```
# vctl health agent_uuid
vctl health a
```

The above command will output json such as the following:



```
{
  "peer": "listeneragent-3.2_1",
  "service_agent": false,
  "connected": "2020-11-02T14:26:07.749003",
  "last_heartbeat": "2020-11-02T14:26:12.762268",
  "message": "GOOD"
}
```

**Note:** When an agent sets its health it can set the message to any serializable string.

## Agent Autostart

An agent can be setup to start when the platform is started with the *enable* command. This command also allows a priority to be set (0-100, default 50) so that agents can be started after any dependencies. This command can also be used with the *--tag* or *--name* options.

```
vctl enable <AGENT_UUID> -p <PRIORITY>
```

## 2.5.3 Authentication Commands

All authentication sub-commands can be viewed by entering following command.

```
vctl auth --help
```

```
usage: vctl command [OPTIONS] ... auth [-h] [-c FILE] [--debug] [-t SECS]
                                         [--msgdebug MSGDEBUG]
                                         [--vip-address ZMQADDR]
                                         ...

optional arguments:
  -h, --help                show this help message and exit
  -c FILE, --config FILE    read configuration from FILE
  --debug                   show tracebacks for errors rather than a brief message
  -t SECS, --timeout SECS   timeout in seconds for remote calls (default: 60)
  --msgdebug MSGDEBUG       route all messages to an agent while debugging
  --vip-address ZMQADDR     ZeroMQ URL to bind for VIP connections

subcommands:
  add                add new authentication record
  add-group           associate a group name with a set of roles
  add-known-host     add server public key to known-hosts file
  add-role            associate a role name with a set of capabilities
  keypair             generate CurveMQ keys for encrypting VIP connections
  list               list authentication records
  list-groups        show list of group names and their sets of roles
  list-known-hosts   list entries from known-hosts file
  list-roles         show list of role names and their sets of capabilities
  publickey          show public key for each agent
```

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remove	removes one or more authentication records by indices
remove-group	disassociate a group name from a set of roles
remove-known-host	remove entry from known-hosts file
remove-role	disassociate a role name from a set of capabilities
serverkey	show the serverkey for the instance
update	updates one authentication record by index
update-group	update group to include (or remove) given roles
update-role	update role to include (or remove) given capabilities
remote	manage pending RMQ certs and ZMQ credentials
rpc	Manage rpc method authorizations

## Authentication record

An authentication record consist of following parameters

```
domain []:
address []: Either a single agent identity or an array of agents identities
user_id []: Arbitrary string to identify the agent
identity []: agents vip identity, if provided
capabilities (delimit multiple entries with comma) []: Array of strings referring to
↳authorized capabilities defined by exported RPC methods
rpc_method_authorizations []: Dictionary containing the agent's exported RPC methods,
↳and the authorized capabilities for each. Will populate on startup.
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []: Public key string for the agent
comments []:
enabled [True]:
```

For more details on how to create authentication record, please see section [Agent Authentication](#)

## How to authenticate an agent to communicate with VOLTTRON platform

An administrator can allow an agent to communicate with VOLTTRON platform by creating an authentication record for that agent. An authentication record is created by using `vctl auth add` command and entering values to asked arguments.

```
vctl auth add

domain []:
address []:
user_id []:
identity []:
capabilities (delimit multiple entries with comma) []:
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []:
comments []:
enabled [True]:
```

The listed fields can also be specified on the command line:

```
vctl auth add --user_id bob --credentials ABCD...
```

If any field is specified on the command line, then the interactive menu will not be used.

The simplest way of creating an authentication record is by entering the `user_id` and credential values. `User_id` is a arbitrary string for VOLTRON to identify the agent. Credential is the encoded public key string for the agent. Create a public/private key pair for the agent and enter encoded public key for credential parameter.

```
vctl auth add

domain []:
address []:
user_id []: my-test-agent
capabilities (delimit multiple entries with comma) []:
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []: encoded-public-key-for-my-test-agent
comments []:
enabled [True]:
```

In next sections, we will discuss each parameter, its purpose and what all values it can take.

### Domain:

Domain is the name assigned to locally bound address. Domain parameter is currently not being used in VOLTRON and is placeholder for future implementation.

### Address:

By specifying address, administrator can allow an agent to connect with VOLTRON only if that agent is running on that address. Address parameter can take a string representing an IP addresses. It can also take a regular expression representing a range of IP addresses.

```
address []: 192.168.111.1
address []: /192.168.*/
```

### User\_id:

`User_id` can be any arbitrary string that is used to identify the agent by the platform. If a regular expression is used for address or credential to combine agents in an authentication record then all those agents will be identified by this `user_id`. It is primarily used for identifying agents during logging.

**Identity:**

An identity is a string that represents the agent's VIP identity. This is an optional field, used by the platform to communicate between agents via RPC calls. It should be set if an agent has RPC exports.

**Capabilities:**

A capability is a string used by an agent to constrain its exported RPC method. Only agents who have that capability listed in their authentication record will be able to access that RPC method.

If an administrator wants to authorize an agent to access an exported RPC method with a specific capability on another agent, the administrator can list that capability string in this parameter. The capability parameter takes a string, an array of strings, or the string representation of dictionary listing all the capabilities this agent is authorized to access.

The agent will have access to all corresponding exported RPC methods of other agents that are constrained by the listed capabilities. For example, if there is an AgentA with capability enables exported RPC method and AgentB needs to access that method then AgentA's code and AgentB's authentication record would be as follows:

AgentA's capability enabled exported RPC method:

```
@RPC.export
@RPC.allow('can_call_bar')
def bar(self):
    return 'If you can see this, then you have the required capabilities'
```

AgentB's authentication record to access bar method:

```
volttron-ctl auth add

    domain []:
    address []:
    user_id []: agent-b
    capabilities (delimit multiple entries with comma) []: can_call_bar
    roles (delimit multiple entries with comma) []:
    groups (delimit multiple entries with comma) []:
    mechanism [NULL]: CURVE
    credentials []: encoded-public-key-for-agent-b
    comments []:
    enabled [True]:
```

Similarly, the capability parameter can take an array of strings:

```
capabilities (delimit multiple entries with comma) []: can_call_bar
capabilities (delimit multiple entries with comma) []: can_call_method1, can_call_
↪method2
```

Capabilities can also be used to restrict access to a rpc method with specific parameter values. For example, if AgentA exposes a method bar which accepts parameter x

AgentA's capability enabled exported RPC method:

```
@RPC.export
@RPC.allow('can_call_bar')
def bar(self, x):
    return 'If you can see this, then you have the required capabilities'
```

You can restrict access to AgentA's bar method to AgentB with x=1. To add this auth entry use the vctl auth add command shown below.

```
vctl auth add --capabilities '{"test1_cap2":{"x":1}}' --user_id AgentB --credential_
↪vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0
```

The auth.json file entry for the above command would be:

```
{
  "domain": null,
  "user_id": "AgentB",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": {
    "test1_cap2": {
      "x": 1
    }
  },
  "groups": [],
  "address": null,
  "credentials": "vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0",
  "comments": null
}
```

Parameter values can also be regular expressions. For example, the following command will allow any agent with

```
(volttron)volttron@volttron1:~/git/myvolttron$ vctl auth add
domain []:
address []:
user_id []:
capabilities (delimit multiple entries with comma) []: {'test1_cap2':{'x': '/.*'}}
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
mechanism [CURVE]:
credentials []: vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0
comments []:
enabled [True]:
added entry domain=None, address=None, mechanism='CURVE', credentials=u
↪'vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0', user_id='b22e041d-ec21-4f78-b32e-
↪ab7138c22373'
```

auth.json file entry for the above command would be:

```
{
  "domain": null,
  "user_id": "90f8ef35-4407-49d8-8863-4220e95974c7",
  "roles": [],
  "enabled": true,
  "mechanism": "CURVE",
  "capabilities": {
    "test1_cap2": {
      "x": "/.*"
    }
  },
  "groups": [],
  "address": null,
  "credentials": "vELQORgWOUcXo69DsSmHiCCLesJPa4-CtVfvoNHwIR0",
  "comments": null
}
```

## Roles:

A role is a name for a set of capabilities. Roles can be used to grant an agent multiple capabilities without listing each capability in the agent's authorization entry. Capabilities can be fully utilized without roles. Roles are purely for organizing sets of capabilities.

Roles can be viewed and edited with the following commands:

- `vctl auth add-role`
- `vctl auth list-roles`
- `vctl auth remove-role`
- `vctl auth updated-role`

For example, suppose agents protect certain methods with the following capabilities: `READ_BUILDING_A_TEMP`, `SET_BUILDING_A_TEMP`, `READ_BUILDING_B_TEMP`, and `SET_BUILDING_B_TEMP`.

These capabilities can be organized into various roles:

```
vctl auth add-role TEMP_READER READ_BUILDING_A_TEMP READ_BUILDING_B_TEMP
vctl auth add-role BUILDING_A_ADMIN READ_BUILDING_A_TEMP SET_BUILDING_A_TEMP
vctl auth add-role BUILDING_B_ADMIN READ_BUILDING_B_TEMP SET_BUILDING_B_TEMP
```

To view these roles run `vctl auth list-roles`:

ROLE	CAPABILITIES
----	-----
BUILDING_A_ADMIN	['READ_BUILDING_A_TEMP', 'SET_BUILDING_A_TEMP']
BUILDING_B_ADMIN	['READ_BUILDING_B_TEMP', 'SET_BUILDING_B_TEMP']
TEMP_READER	['READ_BUILDING_A_TEMP', 'READ_BUILDING_B_TEMP']

With this configuration, adding the `BUILDING_A_ADMIN` role to an agent's authorization entry implicitly grants that agent the `READ_BUILDING_A_TEMP` and `SET_BUILDING_A_TEMP` capabilities.

To add a new capabilities to an existing role:

```
vctl auth update-role BUILDING_A_ADMIN CLEAR_ALARM TRIGGER_ALARM
```

To remove a capability from a role:

```
vctl auth update-role BUILDING_A_ADMIN TRIGGER_ALARM --remove
```

## Groups:

Groups provide one more layer of *grouping*. A group is a named set of roles. Like roles, groups are optional and are meant to help with organization.

Groups can be viewed and edited with the following commands:

- `vctl auth add-group`
- `vctl auth list-groups`
- `vctl auth remove-group`
- `vctl auth updated-group`

These commands behave the same as the *role* commands. For example, to further organize the capabilities in the previous section, one could create an `ALL_BUILDING_ADMIN` group:

```
vctl auth add-group ALL_BUILDING_ADMIN BUILDING_A_ADMIN BUILDING_B_ADMIN
```

With this configuration, agents in the `ALL_BUILDING_ADMIN` group would implicitly have the `BUILDING_A_ADMIN` and `BUILDING_B_ADMIN` roles. This means such agents would implicitly be granted the following capabilities: `READ_BUILDING_A_TEMP`, `SET_BUILDING_A_TEMP`, `READ_BUILDING_B_TEMP`, and `SET_BUILDING_B_TEMP`.

### Mechanism:

Mechanism is the authentication method by which the agent will communicate with VOLTTRON platform. Currently VOLTTRON uses only CURVE mechanism to authenticate agents.

### Credentials:

The credentials field must be an CURVE encoded public key (see `volttron.platform.vip.socket.encode_key` for method to encode public key).

```
credentials []: encoded-public-key-for-agent
```

### Comments:

Comments is arbitrary string to associate with authentication record

### Enabled:

TRUE or FALSE value to enable or disable the authentication record. Record will only be used if this value is True

## Remote Agent Management

The remote sub-parser allows the user to manage connections to remote platforms and agents. This functionality is comparable to that provided by the admin webpage, and requires the volttron instance to be web enabled. In addition, when working with RMQ based CSRs, the RMQ messagebus must be used.

All remote sub-commands can be viewed by entering following command:

```
vctl auth remote --help
```

```
optional arguments:
  -h, --help            show this help message and exit
  -c FILE, --config FILE
                        read configuration from FILE
  --debug               show tracebacks for errors rather than a brief message
  -t SECS, --timeout SECS
                        timeout in seconds for remote calls (default: 60)
  --msgdebug MSGDEBUG  route all messages to an agent while debugging
  --vip-address ZMQADDR
                        ZeroMQ URL to bind for VIP connections

remote subcommands:
```

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list	lists approved, denied, and pending certs and credentials
approve	approves pending or denied remote connection
deny	denies pending or denied remote connection
delete	approves pending or denied remote connection

The four primary actions are list, approve, deny, and delete. List displays all remote CSRs and ZMQ credentials, their address, and current status, either APPROVED, DENIED, or PENDING.

USER_ID	ADDRESS	STATUS
volttron1.volttron1.platform.agent	192.168.56.101	PENDING
917a5da0-5a85-4201-b7d8-cd8c3959f391	127.0.0.1	PENDING

To accept a pending cert/credential, use:

```
vctl auth remote approve <USER_ID>
```

The USER\_ID can be taken directly from vctl auth remote list.

To deny a pending cert/credential, use:

```
vctl auth remote deny <USER_ID>
```

Once a cert/credential has been approved or denied, the status will change.

USER_ID	ADDRESS	STATUS
volttron1.volttron1.platform.agent	192.168.56.101	APPROVED
917a5da0-5a85-4201-b7d8-cd8c3959f391	127.0.0.1	DENIED

The status of an approved or denied cert is persistent. A user may deny a previously approved cert/credential, or approve a previously denied cert/credential. However, if a cert or credential is deleted, then the remote instance must resend the request.

A request can be deleted using the following command:

```
vctl auth remote delete <USER_ID>
```

## Dynamic RPC Method Authorization

RPC method authorizations are the capabilities used to limit access to specific exported RPC methods on an agent. While the capability field is used to define which exported RPC methods the agent can access, the rpc\_method\_authorization field describes which capabilities will authorize a remote agent to access its exported RPC methods.

**Note:** While this field can be modified manually, it is best practice to use the interface. When the agent starts up, it will query the AuthService for all current allowed rpc capabilities on each method.

The format for rpc\_method\_authorizations is as follows:

```
rpc_method_authorizations: {
  "RPC_exported_method_1": [
    "authorized_capability_1",
    "authorized_capability_2"
```

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```

    ],
    "RPC_exported_method_2": [
        "authorized_capability_3",
    ]
}

```

To dynamically modify an RPC method’s authorization, use:

```
vctl auth rpc add <agent_id.method> <authorized_capability 1> <authorized_capability_
↪2> ...
```

For example, AgentA has an RPC exported method ‘bar’ which can be called by any other agent.

```

@RPC.export
def bar(self, x):
    return 'If you can see this, then you have the required capabilities'

```

If you wanted the bar method to only be accessible to an agent with the “can\_call\_bar” capability, you could restrict access to the bar method on AgentA using the following command:

```
vctl auth rpc add AgentA.bar can_call_bar
```

This would be equivalent to having written the agent method as:

```

@RPC.export
@RPC.allow("can_call_bar")
def bar(self, x):
    return 'If you can see this, then you have the required capabilities'

```

Although it would be possible to re-write the agent method in the above manner, a restart of the agent would be required for the change to take effect. By using the vctl command, the method’s authorization is updated on the fly.

On the other hand, if you wish to remove an rpc authorization from an agent dynamically, you can use the `remove` command.

As in the above example, AgentA has a method ‘bar’, which can only be called by agents with the “can\_call\_bar” capability. Since you want bar to be accessible to all agents, regardless of their capabilities, you could use the command:

```
vctl auth rpc remove AgentA.bar can_call_bar
```

## 2.6 Configuration Store

The Platform Configuration Store is a mechanism provided by the platform to facilitate the dynamic configuration of agents. The Platform Configuration Store works by informing agents of changes to their configuration store and the agent responding to those changes by updating any settings, subscriptions, or processes that are affected by the configuration of the Agent.

### 2.6.1 Configurations and Agents

Each agent has its own configuration store (or just store). Agents are not given access to any other agent's store.

The existence of a store is not dependent on the existence of an agent installed on the platform.

Each store has a unique identity. Stores are matched to agents at agent runtime via the agent's *VIP Identity*. Therefore the store for an agent is the store with the same identity as the agent's VIP IDENTITY.

When a user updates a configuration in the store the platform immediately informs the agent of the change. The platform will not send another update until the Agent finishes processing the first. The platform will send updates to the agent, one file at a time, in the order the changes were received.

### 2.6.2 Configuration Names

Every configuration in an agent's store has a unique name. When a configuration is added to an agent's store with the same name as an existing configuration it will replace the existing configuration. The store will remove any leading or trailing whitespace, "/", and "\" from the name.

### 2.6.3 Configuration File Types

The configuration store will automatically parse configuration files before presenting them to an agent. Additionally, the configuration store does support storing raw data and giving to the agent unparsed. Most Agents will require the configuration to be parsed. Any Agent that requires raw data will specifically mention the requirement in its documentation.

This system removes the requirement that configuration files for an agent be in a specific format. For instance a registry configuration for a driver may be JSON instead of CSV if that is more convenient for the user. This will work as long as the JSON parses into an equivalent set of objects as an appropriate CSV file.

Currently the store supports parsing JSON and CSV files with support for more files types to come.

#### JSON

The store uses the same JSON parser that agents use to parse their configuration files. Therefore it supports Python style comments and must create an object or list when parsed.

```
{
  "result": "PREEMPTED", #This is a comment.
  "info": null,
  "data": {
    "agentID": "my_agent", #This is another comment.
    "taskID": "my_task"
  }
}
```

## CSV

A CSV file is represented as a list of objects. Each object represents a row in the CSV file.

For instance this simple CSV file:

Table 2: Example CSV

Volttron Point Name	Modbus Register	Writable	Point Address
ReturnAirCO2	>f	FALSE	1001
ReturnAirCO2Stpt	>f	TRUE	1011

Is the equivalent to this JSON file:

```
[
  {
    "Volttron Point Name": "ReturnAirCO2",
    "Modbus Register": ">f",
    "Writable": "FALSE",
    "Point Address": "1001"
  },
  {
    "Volttron Point Name": "ReturnAirCO2Stpt",
    "Modbus Register": ">f",
    "Writable": "TRUE",
    "Point Address": "1011"
  }
]
```

### 2.6.4 File references

The Platform Configuration Store supports referencing one configuration file from another. If a referenced file exists the contents of that file will replace the file reference when the file is processed by the agent. Otherwise the reference will be replaced with null (or in Python, None).

Only configurations that are parsed by the platform (currently JSON or CSV) will be examined for references. If the file referenced is another parsed file type (JSON or CSV, currently) then the replacement will be the parsed contents of the file, otherwise it will be the raw contents of the file.

In a JSON object the name of a value will never be considered a reference.

A file reference is any value string that starts with `config://`. The rest of the string is the name of another configuration. The configuration name is converted to lower case for comparison purposes.

Consider the following configuration files named *devices/vav1.config* and *registries/vav.csv*, respectively:

```
{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},
  "driver_type": "bacnet",
  "registry_config": "config://registries/vav.csv",
  "campus": "pnnl",
  "building": "isb1",
  "unit": "vav1"
}
```

Table 3: vav.csv

Volttron Point Name	Modbus Register	Writable	Point Address
ReturnAirCO2	>f	FALSE	1001
ReturnAirCO2Stpt	>f	TRUE	1011

The resulting configuration returns when an agent asks for *devices/vav1.config*.

```
{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},

  "driver_type": "bacnet",
  "registry_config": [
    {
      "Volttron Point Name": "ReturnAirCO2",
      "Modbus Register": ">f",
      "Writable": "FALSE",
      "Point Address": "1001"
    },
    {
      "Volttron Point Name": "ReturnAirCO2Stpt",
      "Modbus Register": ">f",
      "Writable": "TRUE",
      "Point Address": "1011"
    }
  ],
  "campus": "pnnl",
  "building": "isb1",
  "unit": "vav1"
}
```

Circular references are not allowed. Adding a file that creates a circular reference will cause that file to be rejected by the platform.

If a configuration is changed in any way and that configuration is referred to by another configuration then the agent considers the referring configuration as changed. Thus a set of configurations with references can be considered one large configuration broken into pieces for the users convenience.

Multiple configurations may all reference a single configuration. For instance, when configuring drivers in the Platform Driver you may have multiple drivers reference the same registry if appropriate.

## 2.6.5 Modifying the Configuration Store

Currently the configuration store must be modified through the command line. See *Commandline Interface*.

### Config Store Command Line Tools

Command line management of the Configuration Store is done with the *vctl config* sub-commands.

#### Store Configuration

To store a configuration in the Configuration Store use the *store* sub-command:

```
vctl config store <agent vip identity> <configuration name> <infile>
```

- **agent vip identity** - The agent store to add the configuration to.
- **configuration name** - The name to give the configuration in the store.
- **infile** - The file to ingest into the store.

Optionally you may specify the file type of the file. Defaults to `--json`.

- `--json` - Interpret the file as JSON.
- `--csv` - Interpret the file as CSV.
- `--raw` - Interpret the file as raw data.

#### Delete Configuration

To delete a configuration in the Configuration Store use the *delete* sub-command:

```
vctl config delete <agent vip identity> <configuration name>
```

- **agent vip identity** - The agent store to delete the configuration from.
- **configuration name** - The name of the configuration to delete.

To delete all configurations for an agent in the Configuration Store use `--all` switch in place of the configuration name:

```
vctl config delete <agent vip identity> --all
```

#### Get Configuration

To get the current contents of a configuration in the Configuration Store use the *get* sub-command:

```
vctl config get <agent vip identity> <configuration name>
```

- **agent vip identity** - The agent store to retrieve the configuration from.
- **configuration name** - The name of the configuration to get.

By default this command will return the json representation of what is stored.

- `--raw` - Return the raw version of the file.

## List Configurations

To get the current list of agents with configurations in the Configuration Store use the *list* sub-command:

```
vctl config list
```

To get the current list of configurations for an agent include the Agent's VIP IDENTITY:

```
vctl config list <agent vip identity>
```

- **agent vip identity** - The agent store to retrieve the configuration from.

## Edit Configuration

To edit a configuration in the Configuration Store use the *edit* sub-command:

```
vctl config edit <agent vip identity> <configuration name>
```

- **agent vip identity** - The agent store containing the configuration.
- **configuration name** - The name of the configuration to edit.

The configuration must exist in the store to be edited.

By default *edit* will try to open the file with the *nano* editor. The *edit* command will respect the *EDITOR* environment variable. You may override this with the *-editor* option.

## Agent Configuration Store

This document describes the configuration store feature and explains how an agent uses it.

The configuration store enables users to store agent configurations on the platform and allows the agent to automatically retrieve them during runtime. Users may update the configurations and the agent will automatically be informed of the changes.

## Compatibility

Supporting the configuration store will *not* be required by Agents, however the usage will be strongly encouraged as it should substantially improve user experience.

The previous method for configuring an agent will still be available to agents (and in some cases required), however agents can be created to only work with the configuration store and not support the old method at all.

It will be possible to create an agent to use the traditional method for configuration to establish defaults if no configuration exist in the platform configuration store.

## Configuration Names and Paths

Any valid OS file path name is a valid configuration name. Any leading or trailing “/”, “” and whitespace is removed by the store.

The canonical name for the main agent configuration is *config*.

The configuration subsystem remembers the case of configuration names. Name matching is case insensitive both on the Agent and platform side. Configuration names are reported to agent callbacks in the original case used when adding them to the configuration. If a new configuration is store with a different case of an existing name the new name case is used.

## Configuration Ownership

Each configuration belongs to one agent and one agent only. When an agent refers to a configuration file via it's path it does not need to supply any information about its identity to the platform in the file path. The only configurations an agent has direct access to are it's own. The platform will only inform the owning agent configuration changes.

## Configuration File Types

Configurations files come in three types: *json*, *csv*, and *raw*. The type of a configuration file is declared when it is added to or changed in the store.

The parser assumes the first row of every CSV file is a header.

Invalid JSON or CSV files are rejected at the time they are added to the store.

Raw files are unparsed and accepted as is.

Other parsed types may be added in the future.

## Configuration File Representation to Agents

### JSON

A JSON file is parsed and represented as appropriate data types to the requester.

Consider a file with the following contents:

```
{
  "result": "PREEMPTED",
  "info": null,
  "data": {
    "agentID": "my_agent",
    "taskID": "my_task"
  }
}
```

The file will be parsed and presented as a dictionary with 3 values to the requester.

## CSV

A CSV file is represented as a list of objects. Each object represents a row in the CSV file.

For instance this (simplified) CSV file:

Table 4: Example CSV

Volttron Point Name	Modbus Register	Writable	Point Address
ReturnAirCO2	>f	FALSE	1001
ReturnAirCO2Stpt	>f	TRUE	1011

will be represented like this:

```
[
  {
    "Volttron Point Name": "ReturnAirCO2",
    "Modbus Register": ">f",
    "Writable": "FALSE",
    "Point Address": "1001"
  },
  {
    "Volttron Point Name": "ReturnAirCO2Stpt",
    "Modbus Register": ">f",
    "Writable": "TRUE",
    "Point Address": "1011"
  }
]
```

## Raw

Raw files are represented as a string containing the contents of the file.

## File references

The *Platform Configuration Store* supports referencing one configuration file from another. If a referenced file exists the contents of that file will replace the file reference when the file is sent to the owning agent. Otherwise the reference will be replaced with None.

Only configurations that are parsed by the platform (currently “json” or “csv”) will be examined for references. If the file referenced is another parsed file type (JSON or CSV, currently) then the replacement will be the parsed contents of the file.

In a JSON object the name of a value will never be considered a reference.

A file reference is any value string that starts with `config://`. The rest of the string is the path in the config store to that configuration. The config store path is converted to lower case for comparison purposes.

Consider the following configuration files named *devices/vav1.config* and *registries/vav.csv*, respectively:

```
{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},
  "driver_type": "bacnet",
```

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```

"registry_config": "config://registries/vav.csv",
"campus": "pnnl",
"building": "isb1",
"unit": "vav1"
}

```

Table 5: vav.csv

Volttron Point Name	Modbus Register	Writable	Point Address
ReturnAirCO2	>f	FALSE	1001
ReturnAirCO2Stpt	>f	TRUE	1011

The resulting configuration returns when an agent asks for *devices/vav1.config*. The Python object will have the following configuration:

```

{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},

  "driver_type": "bacnet",
  "registry_config": [
    {
      "Volttron Point Name": "ReturnAirCO2",
      "Modbus Register": ">f",
      "Writable": "FALSE",
      "Point Address": "1001"
    },
    {
      "Volttron Point Name": "ReturnAirCO2Stpt",
      "Modbus Register": ">f",
      "Writable": "TRUE",
      "Point Address": "1011"
    }
  ],
  "campus": "pnnl",
  "building": "isb1",
  "unit": "vav1"
}

```

Circular references are not allowed. Adding a file that creates a circular reference will cause that file to be rejected by the platform.

If a file is changed in anyway (*NEW*, *UPDATE*, or *DELETE*) and that file is referred to by another file then the platform considers the referring configuration as changed. The configuration subsystem on the Agent will call every callback listening to a file or any file referring to that file either directly or indirectly.

## Agent Configuration Sub System

The configuration store shall be implemented on the Agent(client) side in the form of a new subsystem called `config`.

The subsystem caches configurations as the platform updates the state to the agent. Changes to the cache triggered by an RPC call from the platform will trigger callbacks in the agent.

No callback methods are called until the *onconfig* phase of agent startup. A new phase to agent startup called *onconfig* will be added to the *Core* ``class`. *Originally it was planned to have this run after the `onstart phase has completed but that is currently not possible.* Ideally if an agent is using the config store feature it will not need any *onstart* methods.

When the *onconfig* phase is triggered the subsystem will retrieve the current configuration state from the platform and call all callbacks registered to a configuration in the store to the *NEW* action. No callbacks are called before this point in agent startup.

The first time callbacks are called at agent startup any callbacks subscribed to a configuration called *config* are called first.

## Configuration Subsystem Agent Methods

These methods are part of the interface available to the Agent.

**`config.get( config_name="config" )`** - Get the contents of a configuration. If no name is provided the contents of the main agent configuration "config" is returned. This may not be called before *onstart* methods are called. If called during the *onstart* phase it will trigger the subsystem to initialize early but will not trigger any callbacks.

**`config.subscribe(callback, action=("NEW", "UPDATE", "DELETE"), pattern="*")`** - Sets up a callback for handling a configuration change. The platform will automatically update the agent when a configuration changes ultimately triggering all callbacks that match the pattern specified. The action argument describes the types of configuration change action that will trigger the callback. Possible actions are *NEW*, *UPDATE*, and *DELETE* or a tuple of any combination of actions. If no action is supplied the callback happens for all changes. A list of actions can be supplied if desired. If no file name pattern is supplied then the callback is called for all configurations. The pattern is an regex used match the configuration name.

The callback will also be called if any file referenced by a configuration file is changed.

The signature of the callback method is `callback( config_name, action, contents )` where *file\_name* is the file that triggered the callback, *action* is the action that triggered the callback, and *contents* are the new contents of the configuration. Contents will be *None* on a *DELETE* action. All callbacks registered for *NEW* events will be called at agent startup after all *onstart* methods have been called. Unlike pubsub subscriptions, this may be called at any point in an agent's lifetime.

**`config.unsubscribe(callback=None, config_name_pattern=None)`** - Unsubscribe from configuration changes. Specifying a callback only will unsubscribe that callback from all config name patterns they have been bound to. If a pattern only is specified then all callbacks bound to that pattern will be removed. Specifying both will remove that callback from that pattern. Calling with no arguments will remove all subscriptions.

**`config.unsubscribe_all()`** - Unsubscribe from all configuration changes.

**`config.set( config_name, contents, trigger_callback=False )`** - Set the contents of a configuration. This may not be called before *onstart* methods are called. This can be used by an agent to store agent state across agent installations. This will *NOT* trigger any callbacks unless *trigger\_callback* is set to *True*. To prevent deadlock with the platform this method may not be called from a configuration callback function. Doing so will raise a *RuntimeError* exception.

This will not modify the local configuration cache the Agent maintains. It will send the configuration change to the platform and rely on the subsequent *update\_config* call.

**config.delete( config\_name, trigger\_callback=False)** - Remove the configuration from the store. This will *NOT* trigger any callbacks unless *trigger\_callback* is *True*. To prevent deadlock with the platform this method may not be called from a configuration callback function. Doing so will raise a *RuntimeError* exception.

**config.list( )** - Returns a list of configuration names.

**config.set\_default(config\_name, contents, trigger\_callback=False)** - Set a default value for a configuration. *DOES NOT* modify the platform's configuration store but creates a default configuration that is used for agent configuration callbacks if the configuration does not exist in the store or the configuration is deleted from the store. The callback will only be triggered if *trigger\_callback* is true and the configuration store subsystem on the agent is not aware of a configuration with that name from the platform store.

Typically this will be called in the *\_\_init\_\_* method of an agent with the parsed contents of the packaged configuration file. This may not be called from a configuration callback. Doing so will raise a *RuntimeError*.

**config.delete\_default(config\_name, trigger\_callback=False)** - Delete a default value for a configuration. This method is included for completeness and is unlikely to be used in agent code. This may not be called from a configuration callback. Doing so will raise a *RuntimeError*.

## Configuration Sub System RPC Methods

These methods are made available on each agent to allow the platform to communicate changes to a configuration to the affected agent. As these methods are not part of the exposed interface they are subject to change.

**config.update( config\_name, action, contents=None, trigger\_callback=True)** - called by the platform when a configuration was changed by some method other than the Agent changing the configuration itself. Trigger callback tells the agent whether or not to call any callbacks associate with the configuration.

## Notes on trigger\_callback

As the configuration subsystem calls all callbacks in the *onconfig* phase and none are called beforehand the *trigger\_callback* setting is effectively ignored if an agent sets a configuration or default configuration before the end of the *onstart* phase.

## Platform Configuration Store

The platform configuration store handles the storage and maintenance of configuration states on the platform.

As these methods are not part of the exposed interface they are subject to change.

## Platform RPC Methods

### Methods for Agents

Agent methods that change configurations do not trigger any callbacks unless `trigger_callback` is `True`.

**set\_config(config\_name, contents, trigger\_callback=False)** - Change/create a configuration file on the platform.

**get\_configs()** - Get all of the configurations for an Agent.

**delete\_config(config\_name, trigger\_callback=False)** - Delete a configuration.

### Methods for Management

**manage\_store\_config(identity, config\_name, contents, config\_type="raw")** - Change/create a configuration on the platform for an agent with the specified identity

**manage\_delete\_config(identity, config\_name)** - Delete a configuration for an agent with the specified identity. Calls the agent's `update_config` with the action *DELETE\_ALL* and no configuration name.

**manage\_delete\_store(identity)** - Delete all configurations for a *VIP Identity*.

**manage\_list\_config(identity)** - Get a list of configurations for an agent with the specified identity.

**manage\_get\_config(identity, config\_name, raw=True)** - Get the contents of a configuration file. If `raw` is set to *True* this function will return the original file, otherwise it will return the parsed representation of the file.

**manage\_list\_stores()** - Get a list of all the agents with configurations.

### Direct Call Methods

Services local to the platform who wish to use the configuration store may use two helper methods on the agent class created for this purpose. This allows the auth service to use the config store before the router is started.

**delete(self, identity, config\_name, trigger\_callback=False)** - Same as functionality as *delete\_config*, but the caller must specify the identity of the config store.

**store(self, identity, config\_name, contents, trigger\_callback=False)** - Same functionality as *set\_config*, but the caller must specify the identity of the config store.

### Command Line Interface

The command line interface will consist of a new commands for the *volttron-ctl* program called *config* with four sub-commands called *store*, *delete*, *list*, *get*. These commands will map directly to the management RPC functions in the previous section.

## Disabling the Configuration Store

Agents may optionally disable support for the configuration store by passing `enable_store=False` to the `__init__` method of the Agent class. This allows temporary agents to not spin up the subsystem when it is not needed. Platform service agents that do not yet support the configuration store and the temporary agents used by `volttron-ctl` will set this value.

## 2.7 Platform Security

There are various security-related topics throughout VOLTTTRON’s documentation. This is a quick roadmap for finding security documentation.

A core component of VOLTTTRON is its *message bus*. The security of this message bus is crucial to the entire system. The *VOLTTTRON Interconnect Protocol* provides communication over the message bus.

VIP was built with security in mind from the ground up. VIP uses encrypted channels and enforces agent *authentication* by default for all network communication. VIP’s *authorization* mechanism allows system administrators to limit agent capabilities with fine granularity.

Even with these security mechanisms built into VOLTTTRON, it is important for system administrators to *harden VOLTTTRON’s underlying OS*.

The VOLTTTRON team has engaged with PNNL’s Secure Software Central team to create a threat profile document. You can read about the threat assessment findings and how the VOLTTTRON team is addressing them here: [SSC Threat Profile](#)

Additional documentation related to VIP authentication and authorization is available here:

### 2.7.1 Key Stores

**Warning:** Most VOLTTTRON users should not need to directly interact with agent key stores. These are notes for VOLTTTRON platform developers. This is not a stable interface and the implementation details are subject to change.

Each agent has its own encryption key-pair that is used to *authenticate* itself with the VOLTTTRON platform. A key-pair comprises a public key and a private (secret) key. These keys are saved in a “key store”, which is implemented by the `KeyStore` class. Each agent has its own key store.

#### Key Store Locations

There are two main locations key stores will be saved. Installed agents’ key stores are in the the agent’s data directory:

```
$VOLTTTRON_HOME/agents/<AGENT_UUID>/<AGENT_NAME>/keystore.json
```

Agents that are not installed, such as platform services and stand-alone agents, store their key stores here:

```
$VOLTTTRON_HOME/keystores/<VIP_IDENTITY>/keystore.json
```

## Generating a Key Store

Agents automatically retrieve keys from their key store unless both the `publickey` and `secretkey` parameters are specified when the agent is initialized. If an agent's key store does not exist it will automatically be generated upon access.

Users can generate a key pair by running the following command:

```
vctl auth keypair
```

## 2.7.2 Known Hosts File

Before an agent can connect to a VOLTTRON platform that agent must know the platform's *VIP address* and public key (known as the *server key*). It can be tedious to manually keep track of server keys and match them with their corresponding addresses.

The purpose of the known-hosts file is to save a mapping of platform addresses to server keys. This way the user only has to specify a server key one time.

### Saving a Server Key

Suppose a user wants to connect to a platform at `192.168.0.42:22916`, and the platform's public key is `uhjbCUm3kT5QWj5Py9w0XZ7c1p6EP8pdo4Hq4dNEIiQ`. To save this address-to-server-key association, the user can run:

```
volttronctl auth add-known-host --host 192.168.0.42:22916 --serverkey_
↪uhjbCUm3kT5QWj5Py9w0XZ7c1p6EP8pdo4Hq4dNEIiQ
```

Now agents on this system will automatically use the correct server key when connecting to the platform at `192.168.0.42:22916`.

### Server Key for Local Platforms

When a platform starts it automatically adds its public key to the known-hosts file. Thus agents connecting to the local VOLTTRON platform (on the same system and using the same `$VOLTTRON_HOME`) will automatically be able to retrieve the platform's public key.

### Know-Host-File Details

---

**Note:** The following details regarding the known-hosts file are subject to change. These notes are primarily for developers, but they may be helpful if troubleshooting an issue. **The known-hosts file should not be edited directly.**

---

## File Location

The known-hosts-file is stored at `$VOLTRON_HOME/known_hosts`.

## File Contents

Here are the contents of an example known-hosts file:

```
{
  "@": "FSG7LHhy3v8tdNz3gK35G6-oxUcylN54pYRKu5fBJzU",
  "127.0.0.1:22916": "FSG7LHhy3v8tdNz3gK35G6-oxUcylN54pYRKu5fBJzU",
  "127.0.0.2:22916": "FSG7LHhy3v8tdNz3gK35G6-oxUcylN54pYRKu5fBJzU",
  "127.0.0.1:12345": "FSG7LHhy3v8tdNz3gK35G6-oxUcylN54pYRKu5fBJzU",
  "192.168.0.42:22916": "uhjbCUm3kT5QWj5Py9w0XZ7c1p6EP8pdo4Hq4dNEIiQ"
}
```

The first four entries are for the local platform. (They were automatically added when the platform started.) The first entry with the `@` key is for IPC connections, and the entries with the `127.0.0.*` keys are for local TCP connections. Note that a single VOLTRON platform can bind to multiple TCP addresses, and each address will be automatically added to the known-hosts file. The last entry is for a remote VOLTRON platform. (It was added in the [Saving a Server Key](#) section.)

### 2.7.3 Agent Isolation Mode

This VOLTRON feature will cause the platform to create a new, unique Unix user(agent users) on the host machine for each agent installed on the platform. This user will have restricted permissions for the file system, and will be used to run the agent process.

**Warning:** The Unix user starting the VOLTRON platform will be given limited sudo access to create and delete agent users.

Since this feature requires system level changes (e.g. sudo access, user creation, file permission changes), the initial step needs to be run as root or user with *sudo* access. This can be a user other than Unix user used to run the VOLTRON platform.

All files and folder created by the VOLTRON process in this mode would not have any access to others by default. Permission for Unix group others would be provided to specific files and folder based on VOLTRON process requirement.

It is recommended that you use a new `VOLTRON_HOME` to run VOLTRON in agent isolation mode. Converting a existing VOLTRON instance to agent isolation mode is also possible but would involve some manual changes. Please see the section [Porting existing volttron home to agent isolation mode](#).

---

**Note:** VOLTRON has to be bootstrapped as prerequisite to running agents as unique users.

---

## Setup agents to run using unique users

### 1. This feature requires `acl` to be installed.

Make sure the `acl` library is installed. If you are running on a Docker image `acl` might not be installed by default.

```
apt-get install acl
```

### 2. Agents now run as a user different from VOLTTRON platform user. Agent users should have `read` and `execute` permissions to all directories in the path to the Python executable used by VOLTTRON. For example, if VOLTTRON is using a virtual environment, then agent users should have `read` permissions to `<ENV_DIR>/bin/python` and `read` and `execute` permission to all the directories in the path `<ENV_DIR>/bin`. This can be achieved by running:

```
chmod -R o+rx <ENV_DIR>/bin
```

### 3. Run `scripts/secure_user_permissions.sh` as root or using `sudo`

This script *MUST* be run as root or using `sudo`. This script gives the VOLTTRON platform user limited `sudo` access to create a new Unix user for each agent. All users created will be of the format `volttron_<timestamp>`.

This script prompts for:

- a. **volttron platform user** - Unix user who would be running the VOLTTRON platform. This should be an existing Unix user. On a development machine this could be the Unix user you logged in as to check out VOLTTRON source
- b. **VOLTTRON\_HOME directory** - The absolute path of the volttron home directory.
- c. **Volttron instance name if VOLTTRON\_HOME/config does not exist** -

If the `VOLTTRON_HOME/config` file exists then instance name is obtained from that config file. If not, the user will be prompted for an instance name. `volttron_<instance_name>` *MUST* be a 23 characters or shorter containing only characters valid as Unix user names.

This script will create necessary entries in `/etc/sudoers.d/volttron` to allow the VOLTTRON platform user to create and delete agent users, the VOLTTRON agent group, and run any non-sudo command as the agent users.

This script will also create `VOLTTRON_HOME` and the config file if given a new VOLTTRON home directory when prompted.

4. **Continue with VOLTTRON bootstrap and setup as normal** - point to the `VOLTTRON_HOME` that you provided in step 2.
5. **On agent install (or agent start for existing agents)** - a unique agent user(Unix user) is created and the agent is started as this user. The agent user name is recorded in `USER_ID` file under the agent install directory (`VOLTTRON_HOME/agents/<agent-uuid>/USER_ID`). Subsequent agent restarts will read the content of the `USER_ID` file and start the agent process as that user.
6. **On agent uninstall** - The agent user is deleted and the agent install directory is deleted.



## Creating new Agents

In agent isolation mode, agents will only have read write access to the agent-data directory under the agent install directory - `VOLTTTRON_HOME/agents/<agent_uuid>/<agent_name>/<agent_name>.agent-data`. Attempting to write in any other folder under `VOLTTTRON_HOME` will result in permission errors.

## Changes to existing agents in agent isolation mode

Due to the above change, **SQL historian has been modified to create its database by default under its agent-data directory** if no path is given in the config file. If providing a path to the database in the config file, please provide a directory where agent will have write access. This can be an external directory for which agent user (*recorded in `VOLTTTRON_HOME/agents/<agent-uuid>/USER_ID`*) has *read, write, and execute* access.

## Porting existing VOLTTTRON home to agent isolation mode

When running `scripts/secure_users_permissions.sh` you will be prompted for a `VOLTTTRON_HOME` directory. If this directory exists and contains a volttron config file, the script will update the file locations and permissions of existing VOLTTTRON files including installed directories. However this step has the following limitations:

1. **You will NOT be able to revert from agent isolation mode once the changes are done.** - Once setup is complete, changing the config file manually to make parameter `agent-isolation-mode` to `False`, may result inconsistent VOLTTTRON behavior
2. The VOLTTTRON process and all agents have to be restarted to take effect
3. **Agents can only write to its own agent-data dir.** - If your agents writes to any directory outside `$VOLTTTRON_HOME/agents/<agent-uuid>/<agent-name>/agent-name.agent-data` move existing files and update the agent configuration such that the agent writes to the `agent-name.agent-data` dir. For example, if you have a `SQLHistorian` which writes a `.sqlite` file to a subdirectory under `VOLTTTRON_HOME` that is not `$VOLTTTRON_HOME/agents/<agent-uuid>/<agent-name>/agent-name.agent-data` this needs to be manually updated.

## 2.7.4 Disabling Authentication in VOLTTTRON

There may be some use-cases, such as simulating deployments or agent development, where security is not a consideration. In these cases, it is possible to disable VOLTTTRON's authentication and authorization, stripping away the security layer from the VIP messagebus and simplifying agent connection and RPC communication.

Since this is not ideal for any deployment, this can only be done by manually modifying the volttron configuration file. Within the config file located within `VOLTTTRON_HOME`, the `allow-auth` option must be added and set to `False`.

```
[volttron]
message-bus = zmq
vip-address = tcp://127.0.0.1:22916
instance-name = volttron1
allow-auth = False
```

In simulation environments where multiple volttron instances are used, it is important to ensure that auth settings are the same across all the instances.

### Important things to consider:

1. This feature is recommended only for use with simulations and instances that are within a restrictive and secure network.

2. When authentication is disabled, there will be no server-key generated for the server and hence the server would not have any access restrictions
3. You can still use ssl (https) for your web access
4. Non auth mode is currently available only for ZMQ

## 2.8 RESTful Web Interface

The VOLTTRON User Interface API (VUI) is provided by the VOLTTRON Web Service, and is intended to provide capabilities for building fully featured frontend applications. The VUI is a RESTful HTTP API for communicating with components of the VOLTTRON system.

### 2.8.1 Installation

The VUI is a built-in part of the VOLTTRON Web Service. To enable the VOLTTRON Web Service, bootstrap VOLTTRON within the virtual environment using the `--web` option:

```
python bootstrap.py --web
```

Additionally, to enable the web service, it is necessary to add a `bind-web-address` key to the `$VOLTTRON_HOME/config` file. The value of this key represents address bound to by the platform web service for handling HTTP(s) requests. Typical addresses would be `https://<hostname_or_ip>:8443` or `http://<hostname_or_ip>:8080`.

---

**Note:** If a hostname is used, it must be resolvable for the service to work as expected.

---

HTTPS is strongly recommended. When https is used, however, it will also be necessary to include `web-ssl-cert` and `web-ssl-key` entries in the `$VOLTTRON_HOME/config` file:

```
[volttron]
message-bus = zmq
instance-name = my_instance
vip-address = tcp://127.0.0.1:22916
bind-web-address = https://<hostname>:8443
web-ssl-cert = /home/volttron/.volttron/certificates/certs/platform_web-server.crt
web-ssl-key = /home/volttron/.volttron/certificates/private/platform_web-server.pem
```

The `vcfg` tool may be used to make the changes to the `$VOLTTRON_HOME/config` file by choosing “Y” for the “Is this instance web enabled?” prompt. To use HTTPS, enter “https” when asked “What is the protocol for this instance?”. The `vcfg` tool will then give the option to generate the required SSL cert and key if these do not already exist.

```
(volttron) [volttron@my_instance volttron]$ vcfg

Your VOLTTRON_HOME currently set to: /home/volttron/.volttron

Is this the volttron you are attempting to setup? [Y]: y
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
What is the name of this instance? [my_instance]:
Is this instance web enabled? [N]: y
```

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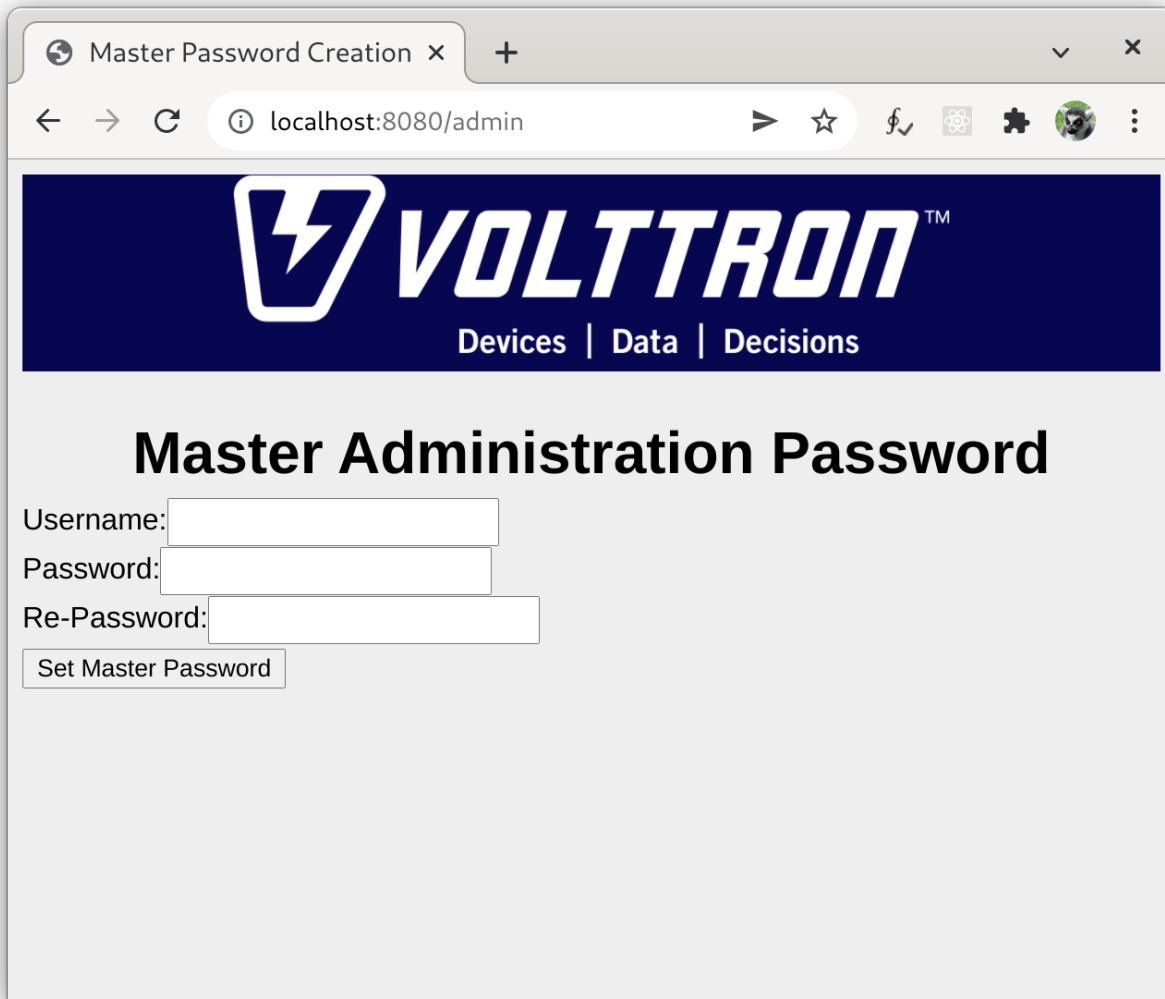
```
What is the protocol for this instance? [http]: https
Web address set to: https://127.0.0.1
What is the port for this instance? [8080]: 8443
Would you like to generate a new web certificate? [Y]: y
WARNING! CA certificate does not exist.
Create new root CA? [Y]: y

Please enter the following details for web server certificate:
    Country: [US]:
    State: WA
    Location: MyTown
    Organization: My Organization
    Organization Unit:
Created CA cert
Creating new web server certificate.
Is this an instance of volttron central? [N]: n
Will this instance be controlled by volttron central? [Y]: n
Would you like to install a platform historian? [N]: n
Would you like to install a platform driver? [N]: n
Would you like to install a listener agent? [N]:
Finished configuration!

You can now start the volttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/volttron/.volttron/config
```

Finally, a user must be configured in the `$VOLTTRON_HOME/web-users.json` file to allow authentication to the API. This file can be generated, if it does not exist, by navigating to *bind-web-address/admin* in a web browser and creating a user and password:



```
{
  "my_user": {
    "hashed_password": "$argon2id$v=19$m=102400,t=2,p=8$tb2PgdA6B3jnPOeUwrB+A
    ↪$yGA2xYOXld+COq4opWbs3Q",
    "groups": ["admin", "vui"]
  }
}
```

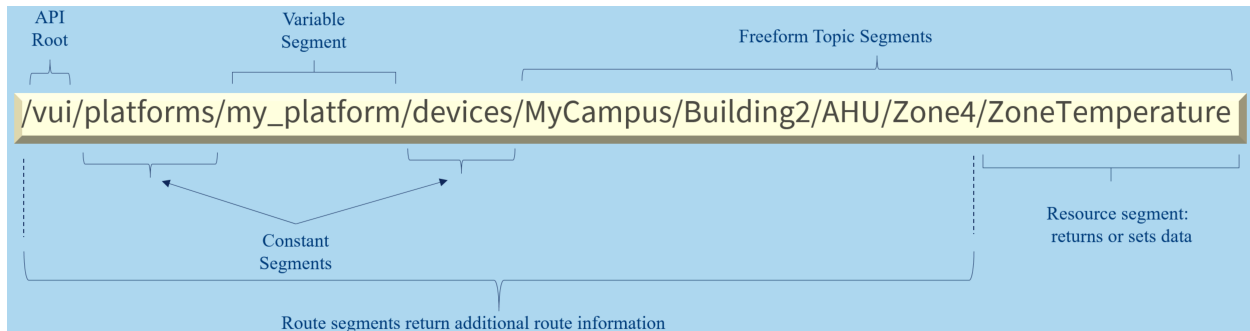
Users with the “vui” claim in *groups* will now be able to use the API by sending requests to endpoints with paths on *bind-web-address* beginning with */vui*. For example, where *bind-web-address* has been set to `https://localhost:8443` the following HTTP request (with a proper *HTTP Authorization Header*) may be used to retrieve the root endpoint of the API:

```
GET https://localhost:8443/vui/
```

Access to the API may be disabled by removing “vui” from the list of groups in `$VOLTTRON_HOME/web-users.json` for any user which should not have access to the API.

## 2.8.2 Path Structure

Paths to endpoints consist of alternating constant and variable segments, and are designed to be readable and discoverable:



Get requests to non-leaf nodes typically return a *route-options* JSON object which gives additional possible paths within the API. For instance, a GET request send to the path `/vui` will return:

```
{
  "route_options": {
    "platforms": "/vui/platforms"
  }
}
```

## 2.8.3 Available Endpoints

Endpoints which are currently provided by the API are described in detail in the following sections:

- **Authentication:** Endpoints for authenticating to the the API.
- **Platforms: Endpoints for working with a particular platform.**
  - **Agents: Endpoints for working with agents on the platform.**
    - \* *Configs*: Endpoints for managing the configuration store for agents on the platform.
    - \* *Enabled*: Endpoints for enabling, disabling, and setting the start priority of agents on the platform.
    - \* *RPC*: Endpoints allowing, discovery, inspection, and calling of remote procedure calls to agents running on the platform.
    - \* *Running*: Endpoints for starting and stopping agents on the platform.
    - \* *Status*: Endpoints for determining status information for agents running on the platform.
    - \* *Tag*: Endpoints for getting, setting, and deleting the tag of agents.
  - *Devices*: Endpoints for getting, setting, and resetting devices on the platform.
  - *Historians*: Endpoints for querying data from historians on the platform.
  - *Pubsub*: Endpoints for subscribing and publishing to the message bus on the platform.
  - *Status*: Endpoints for determining and clearing the status of all agents on the platform.

## Authentication EndPoints

The VOLTTRON Web API requires the use of bearer tokens to access resources. These tokens are JSON Web Tokens (JWT) and are provided by the two `/authenticate` endpoints (POST and PUT). Two classes of token are provided to the user:

- **Refresh Tokens:** Refresh tokens are long-lived, and used can be used to obtain a new short-lived access token. Refresh tokens are obtained by providing a valid username and password to the `POST /authenticate` endpoint. The refresh token **SHOULD** be kept secure on the client side, and **SHOULD NOT** be provided to API call other than to `PUT /authenticate`.
- **Access Tokens:** An access token are short-lived tokens required to obtain resources or services provided by other API endpoints. The access token is obtained using the `PUT /authenticate` endpoint. For convenience, an initial access token is provided by the `POST /authenticate` endpoint as well, but as use the `POST` method requires sending credentials to the server, this should only be used on the first call, with `PUT` being used thereafter to obtain new access tokens until the refresh token has also expired.

---

**Note:** Authentication begins by obtaining a JWT bearer refresh token from the `POST /authenticate` endpoint. An initial access token is provided by this endpoint as well. Subsequent access tokens are then obtained by providing the refresh token to the `PUT /authenticate` endpoint without resending of credentials.

---

---

### POST /authenticate

Provide authentication credentials to receive refresh token.

The user provides a username and password in the request body. If authentication succeeds, the endpoint will return a JWT bearer refresh token with user's claims. An initial access token is also returned. The refresh token can then be provided to `PUT /authenticate` to obtain new short-lived access tokens, as needed, without sending the username and password again until the refresh token expires.

#### Request:

- Content Type: `application/json`
- Body:

```
{
  "username": "<username>",
  "password": "<password>"
}
```

**Response:**

- **With valid username and password: 200 OK**

- Content Type: application/json
- Body:

```
{
  "refresh_token": "<jwt_refresh_token>",
  "access_token": "<jwt_access_token>"
}
```

- **With invalid username and password: 401 Unauthorized**

---

**PUT /authenticate**

Renew access token.

The user provides a valid refresh token (provided by POST /authenticate) in the Authorization header to obtain a fresh access token. A current access token MAY also be provided, as needed, in the request body to keep open any existing subscriptions. All subsequent requests to any endpoint should include the new token, and the old access token should be discarded.

**Request:**

- Content Type: application/json
- Authorization: BEARER <jwt\_refresh\_token>
- Body (optional):

```
{
  "current_access_token": "<jwt_access_token>"
}
```

**Response:**

- **With valid refresh token: 200 OK**

- Content Type: application/json
- Body:

```
{
  "access_token": "<new_jwt_access_token>"
}
```

- **With invalid or mismatched username, password, or token: 401 Unauthorized**

## Platforms Endpoints

Platforms endpoints expose functionality associated with specific VOLTTRON platforms.

As all functionality of VOLTTRON is the purview of one or another platform, the `/platforms` tree forms the core of the VOLTTRON User Interface API. Other top level partitions of the API consist of convenience methods which refer to endpoints within `/platforms`.

The platforms tree currently provides access to four major categories of endpoint, each of which are described in detail through the following links:

- *Agents*: Endpoints pertaining to a specific agent (e.g. RPC)
- *Devices*: Endpoints for discovering, getting, and setting data about the current state of devices on the platform.
- *Historians*: Endpoints for querying data from historians.
- *PubSub*: Endpoints for subscription and publication to message bus topics.
- *Status*: Endpoints for retrieving and clearing status of all agents on the platform.

**Attention:** All endpoints in this tree require authorization using a JWT bearer token provided by the `POST /authenticate` or `PUT /authenticate` endpoints.

---

## GET /platforms

Obtain routes for connected platforms.

A GET request to the `/platforms` endpoint will return a JSON object containing routes to available platforms. Available routes are included in a “route\_options” object. The keys of the “route\_options” object are the name of each platform which is currently reachable through the API, and the values contain a route to an endpoint for the platform.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success: 200 OK**
  - Content Type: `application/json`
  - Body:

```
{
  "route_options": {
    "<platform1>": "/platforms/<platform1>",
    "<platform2>": "/platforms/<platform2>"
  }
}
```



- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## GET /platforms/:platform

Obtain routes available for a specific platform.

A GET request to the /platforms/:platform endpoint (where :platform is the instance name of a specific platform) will return a JSON object containing routes to endpoints which are available for the requested platform. Available routes are included in a “route\_options” object. The keys of the “route\_options” object are the name of each endpoint which the platform supports, and the values contain a route to that endpoint for this platform. The currently implemented possibilities include: *agents*, *devices*, *historians*, *pubsub* and *status*.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    "<endpoint1_name>": "/platforms/:platform/<endpoint1_name>"
    ↪",
    "<endpoint2_name>": "/platforms/:platform/<endpoint2_name>"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## Platforms Agents Endpoints

Platforms Agents endpoints expose functionality associated with applications running on a VOLTTRON platform.

### Platforms Agents endpoints currently include:

- *Configs*: Endpoints for managing the configuration store for agents on the platform.
- *Enabled*: Endpoints for enabling, disabling, and setting the start priority of agents on the platform.
- *Running*: Endpoints for starting and stopping agents on the platform.
- *RPC*: Endpoints allowing, discovery, inspection, and calling of remote procedure calls to agents running on the platform.
- *Status*: Endpoints for determining the status information for an agent running on the platform.
- *Tag*: Endpoints for getting, setting, and deleting the tag of agents.

**Attention:** All Platforms Agents endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

---

## GET /platforms/:platform/agents

Return routes for the agents installed on the platform.

Accepts a two query parameters:

- **agent-state** accepts one of three string values:
  - “*running*” (default): Returns only those agents which are currently running.
  - “*installed*”: Returns all installed agents.
  - “*packaged*”: Returns filenames of packaged agents on the platform which can be installed.
- **include-hidden** (default=False): When True, includes system agents which would not normally be displayed by `vcctl status`.

### Request:

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    "<vip_identity>": "/platforms/:platform/agents/:vip_
↪identity",
    "<vip_identity>": "/platforms/:platform/agents/:vip_
↪identity"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**GET /platforms/:platform/agents/:vip-identity**

Return routes for the supported endpoints for an agent installed on the platform. Currently implemented endpoints include [RPC](#).

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    "<vip_identity>": "/platforms/:platform/agents/:vip_
↪identity/<endpoint1_name>",
    "<vip_identity>": "/platforms/:platform/agents/:vip_
↪identity/<endpoint2_name>"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## Platforms Agents Configs Endpoints

Platforms Agents Configs endpoints expose functionality associated with agent configurations stored in the VOLTTRON Configuration Store.

**Attention:** All Platforms Configs endpoints require a JWT bearer token obtained through the POST /authenticate or PUT /authenticate endpoints.

---

### GET /platforms/:platform/agents/:vip\_identity/configs

Get routes to available configuration files for the specified agent.

#### Request:

- Authorization: BEARER <jwt\_access\_token>

#### Response

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    ":config_file_name": "/platforms/:platform/agents/:vip_
↪identity/configs/:config_file_name",
    "<config_file_name>": "/platforms/:platform/agents/:vip_
↪identity/configs/:config_file_name",
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## POST /platforms/:platform/agents/:vip\_identity/configs/

Save a new configuration file to the config store.

The file name should be passed in the query parameter file-name.

The file should match the content type and contents which the VOLTTTRON configuration store expects. The configuration store currently accepts only JSON, CSV, or RAW files. The content type header should match the type of file being sent (application/json, text/csv, or text/plain respectively). This endpoint will return 409 Conflict if the configuration file already exists. In this case, the user should use PUT /platforms/:platform/agents/:vip\_identity/configs/:file\_name if modification of the existing file is truly intended.

### Request:

- Authorization: BEARER <jwt\_access\_token>
- Content Type: application/json, text/csv, or text/plain
- Body: Contents of configuration file.

### Response

- **With valid BEARER token on success: 201 Created**
  - Location: /platforms/:platform/agents/:vip\_identity/configs/:file\_name
  - Content Type: application/json, text/csv, or text/plain
  - Body: Contents of the configuration file.
- **With valid BEARER token on failure: 400 Bad Request or 409 Conflict**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**DELETE /platforms/:platform/agents/:vip\_identity/configs/**

Remove the configuration store for an agent. This endpoint will return `409 Conflict` if the store for this agent is not empty. To remove all existing configurations for an agent from the config store and delete the store, `true` must be passed to the `all` query parameter.

**Request:**

- Authorization: `BEARER <jwt_access_token>`
- **Query Parameters:**
  - `all`: Boolean (default `false`)

**Response**

- **With valid BEARER token on success:** `204 No Content`
- **With valid BEARER token on failure: 400 Bad Request or 409 Conflict**
  - Content Type: `application/json`
  - Body:

```
{
  "error": "<Error Message>"
}
```
- **With invalid BEARER token:** `401 Unauthorized`

---

**GET /platforms/:platform/agents/:vip\_identity/configs/:config\_name**

Get a configuration file for the agent from the config store.

The configuration store can currently return JSON, CSV, or RAW files. If the `Accept` header is not set, the configuration store will return JSON by default. If the client wishes to restrict the type of file received, it should set the `Accept` header to the correct MIME type(s) (`application/json`, `text/csv`, or `text/plain` respectively).

**Request:**

- Authorization: `BEARER <jwt_access_token>`

## Response

- **With valid BEARER token on success: 200 OK**
  - Content Type: application/json, text/csv, or text/plain
  - Body: Contents of the configuration file.
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## PUT /platforms/:platform/agents/:vip\_identity/configs/:config\_name

Overwrite a configuration file already in the config store.

The file should match the content type and contents which the VOLTTRON configuration store expects. The configuration store currently accepts only JSON, CSV, or RAW files. The content type header should match the type of file being sent (application/json, text/csv, or text/plain respectively).

## Request:

- Authorization: BEARER <jwt\_access\_token>
- Content Type: application/json, text/csv, or text/plain
- Body: Contents of configuration file.

## Response

- **With valid BEARER token on success: 204 No Content**
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**DELETE /platforms/:platform/agents/:vip\_identity/configs/:config\_name**

Remove an existing configuration file for the agent from the config store.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{  
  "error": "<Error Message>"  
}
```

- **With invalid BEARER token:** 401 Unauthorized

**Platforms Agents Enabled Endpoints**

Platforms Agents Enabled endpoints expose functionality associated with the enabled status of agents on the platform. This includes determining whether an agent is enabled (and with what start priority), as well as enabling and disabling the agent.

**Attention:** All Platforms Agents Enabled endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

**GET /platforms/:platform/agents/:agent/enabled**

Retrieve the enabled status and priority of the specified agent.

**Request:**

- Authorization: BEARER <jwt\_access\_token>



**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "status": true|false,
  "priority": int
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**PUT /platforms/:platform/agents/:agent/enabled**

Enable the specified agent.

Accepts the `priority` query parameter to set the start priority of the agent. Allowable priorities range from 0 to 99. If the priority is not given, the agent will be enabled with a priority of 50.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 204 No Content**

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**DELETE /platforms/:platform/agents/:agent/enabled**

Disable the specified agent.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

**Platforms Agents Health Endpoints**

Platforms Agents Health endpoints expose functionality associated with getting health information for a single agent running on a VOLTTRON platform.

**Attention:** All Platforms Agents Health endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

**GET /platforms/:platform/agents/:agent/health**

Retrieve health information for the specified agent.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "status": "<status_message>",
  "context": {"<agent_specific_keys>": "agent_specific_values"},
  "last_updated": "<date_time>"
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**Platforms Agents RPC Endpoints**

RPC endpoints expose functionality associated with remote procedure calls to agents running on a VOLTTRON platform.

**Attention:** All RPC endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

**GET /platforms/:platform/agents/:vip\_identity/rpc**

Get available remote procedure call endpoints for the specified agent.

Success will yield a JSON object with available RPC methods as keys and routes for these as values.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    "<function_name>": "/platforms/:platform/agents/:vip_
↪identity/rpc/:function_name",
    "<function_name>": "/platforms/:platform/agents/:vip_
↪identity/rpc/:function_name"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

---

**GET /platforms/:platform/agents/:vip\_identity/rpc/:function\_name**

Inspect a remote procedure call method.

---

**Note:** The information for this endpoint is provided by the *inspect* module. Not all information is available for all RPC methods. If the data is not available, the key will be absent from the response.

*kind* is an enumeration where the values may be *POSITIONAL\_OR\_KEYWORD*, *POSITIONAL\_ONLY*, or *KEYWORD\_ONLY*.

---

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "params": {
    "param_name_1": {
      "kind": "POSITIONAL_OR_KEYWORD",
      "default": "<type>"
    },
    "param_name_2": {
      "kind": "KEYWORD_ONLY",
      "default": null
    }
  },
  "doc": "Docstring from the method, if available.",
  "source": {
    "file": "<path/to/source/file.py>",
    "line_number": "<line_number>"
  }
  "return": "<return_type>"
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**POST /platforms/:platform/agents/:vip\_identity/rpc/:function\_name**

Send an remote procedure call to an agent running on a VOLTTRON platform.

Parameters provided in the request body are passed as arguments to the RPC method. The return value of an RPC call is defined by the agent, so this may be a scalar value or another JSON object, for instance a list, dictionary, etc.

**Request:**

- Content Type: application/json
- Authorization: BEARER <jwt\_access\_token>
- Body:

```
{  
  "<param_name>": "<value>",  
  "<param_name>": "<value>"  
}
```

**Response:**

- **With valid BEARER token on success: 200 OK**
  - Content Type: application/json
  - Body: Any, as defined by the RPC method.
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{  
  "error": "<Error Message>"  
}
```

- **With invalid BEARER token: 401 Unauthorized**

**Platforms Agents Running Endpoints**

Platforms Agents Running endpoints expose functionality associated with the running status of agents on the platform. This includes determining whether an agent is running as well as starting and stopping the agent.

**Attention:** All Platforms Agents Running endpoints require a JWT bearer token obtained through the POST /authenticate or PUT /authenticate endpoints.

**GET /platforms/:platform/agents/:agent/running**

Retrieve the running status of the specified agent.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "status": true|false
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

---

**PUT /platforms/:platform/agents/:agent/running**

Start the specified agent.

Accepts the `restart` query parameter to restart an agent. If the agent is already running, an error will be returned if the restart parameter is not “true”.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 204 No Content**
- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized
- 

### DELETE /platforms/:platform/agents/:agent/running

Stop the specified agent.

#### Request:

- Authorization: BEARER <jwt\_access\_token>

#### Response:

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

### Platforms Agents Status Endpoints

Platforms Agents Status endpoints expose functionality associated with getting status for a single agent running on a VOLTTRON platform. Only a GET method is currently implemented.

**Attention:** All Platforms Agents Status endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

### GET /platforms/:platform/agents/:agent/status

Get status for a specific agent on the platform.



**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "name": "<wheel_name>",
  "uuid": "<uuid>",
  "tag": "<tag>",
  "priority": "<int>",
  "running": <true|false>,
  "enabled": <true|false>,
  "pid": <int>,
  "exit_code": <null|int>
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**Platforms Agents Tag Endpoints**

Platforms Agents Tag endpoints expose functionality associated with tags given to agents on the platform. Agent tags provide a short name which can be used to identify an agent.

**Attention:** All Platforms Agents Tag endpoints require a JWT bearer token obtained through the POST /authenticate or PUT /authenticate endpoints.

**GET /platforms/:platform/agents/:agent/tag**

Retrieve the tag of the specified agent.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "tag": "<tag>"
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**
- 

**PUT /platforms/:platform/agents/:agent/tag**

Set the tag to an agent installed on the platform.

**Request:**

- Authorization: BEARER <jwt\_token>
- Content Type: application/json
- Body:

```
{
  "tag": "<tag>"
}
```

**Response:**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{  
  "error": "<Error Message>"  
}
```

- **With invalid BEARER token:** 401 Unauthorized
- 

**DELETE /platforms/:platform/agents/:agent/tag**

Remove the tag from an agent installed on a VOLTTTRON platform.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{  
  "error": "<Error Message>"  
}
```

- **With invalid BEARER token:** 401 Unauthorized

**Platforms Configs Endpoints**

Platforms Configs endpoints expose functionality associated with platform configuration files. These endpoints are for platform-level configurations. Agent configurations are managed by the *Platforms Agents Configs* endpoints.

**Attention:** All Platforms Configs endpoints require a JWT bearer token obtained through the POST /authenticate or PUT /authenticate endpoints.

### GET /platforms/:platform/configs

Get routes to available configuration files for the specified platform.

#### Request:

- Authorization: BEARER <jwt\_access\_token>

#### Response:

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "route_options": {
    "<config_name>": "/platforms/:platform/configs/:config_name",
    "<config_name>": "/platforms/:platform/configs/:config_name"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**
- 

### POST /platforms/:platform/configs

Save a new platform configuration file.

The file name should be passed in the query parameter file-name.

The platform configuration files are currently either JSON or INI files. The MIME type of the request will be either application/json or text/plain in the case of INI files. This endpoint will return an error if the file already exists. To update an existing file, use the PUT /platforms/:platform/configs/:file\_name endpoint.

**Warning:** Editing platform configuration files can affect the ability of the platform to restart. It is not currently possible to repair an unstartable platform from the API. Fixing mistakes will require direct access to the device or SSH.

**Request:**

- Authorization: BEARER <jwt\_access\_token>
- Content Type: application/json or text/plain
- **Query Parameters:**
  - file-name: The name of the file. If the file will be saved in a subdirectory, file-name should be a URL-encoded path to the location of the file relative to the VOLTRON\_HOME directory. Paths outside of VOLTRON\_HOME will be disallowed.
- Body (shown for JSON):

```
{
  "<setting_name>": <value>,
  "<setting_name>": <value>,
}
```

**Response:**

- **With valid BEARER token on success: 201 Created**
  - Location: /platforms/:platform/configs/:file\_name
  - Content Type: application/json
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**
- 

**GET /platforms/:platform/configs/:config\_name**

Get a configuration file for the platform (not for an individual agent).

The platform configuration files are currently either JSON or INI files. The MIME type of the response will be either application/json or text/plain in the case of INI files.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- *JSON file:*

- \* Content Type: application/json

- \* Body:

```
{
  "<setting_name>": <value>,
  "<setting_name>": <value>,
}
```

- *INI file:*

- \* Content Type: text/plain

- \* Body:

```
[section_name]
key1=value1
key2=value2
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json

- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**
- 

**PUT /platforms/:platform/configs/:config\_name**

Replace an existing platform configuration file.

The platform configuration files are currently either JSON, INI files. The MIME type of the response will be either `application/json` or `text/plain` in the case of INI files. This endpoint will return an error if the file does not already exist. To create a new file, use the `POST /platforms/:platform/configs` endpoint.

If the file is located in a subdirectory, `:config_name` should be a URL-encoded path to the location of the file relative to the `VOLTTRON_HOME` directory. Paths outside of `VOLTTRON_HOME` will be disallowed.

**Warning:** Editing platform configuration files can affect the ability of the platform to restart. It is not currently possible to repair an unstartable platform from the API. Fixing mistakes will require direct access to the device or SSH.

### Request:

- Authorization: BEARER <jwt\_access\_token>
- Content Type: application/json or text/plain
- Body (shown for JSON):

```
{
  "<setting_name>": <value>,
  "<setting_name>": <value>,
}
```

### Response:

- **With valid BEARER token on success: 201 Created**
  - Location: /platforms/:platform/configs/:file\_name
  - Content Type: application/json
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## DELETE /platforms/:platform/configs/:config\_name

Delete an existing platform configuration file.

If the file is located in a subdirectory, :config\_name should be a URL-encoded path to the location of the file relative to the VOLTRON\_HOME directory. Paths outside of VOLTRON\_HOME will be disallowed.

**Warning:** Editing platform configuration files can affect the ability of the platform to restart. It is not currently possible to repair an unstartable platform from the API. Fixing mistakes will require direct access to the device or SSH.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

**Platforms Devices Endpoints**

Platform Devices endpoints expose functionality associated with devices managed by a VOLTTRON platform. An optional topic portion of the route path may be used to select specific devices within the platform. The selection of devices may then be further refined through the use of query parameters, as described in *Use of Topics*.

---

**Use of Topics**

There is no special meaning to most segments of a topic in the VOLTTRON platform. In the context of devices, however, the final segment in a full topic denotes a point which can be read or actuated. Partial topics denote some collection of these point resources. For instance, in the caes of a topic hierarchy organized as `:campus/:building/:device/:point`, a topic which is complete up to the `:device` level would yield a single device containing one or more points. A topic complete to the `:building` level would include a set of devices, each containing some set of points. The response to any request containing a full topic will therefore perform a get or set operation, while a partial topic will typically return a list of routes to further sub-topics (unless it is explicitly requested that an operation be performed on multiple points).

Several methods are available to refine the list of topics:

**Topic Wildcards:** The `-` character may be used alone to represent any value for a segment: `/:campus/-/:device` will match all devices with the name `:device` on the `:campus` in any building. It is not possible to use `-` as a wildcard within a segment containing other characters: `/campus/foo-bar/:device` will only match a building called “foo-bar”, not one called “foobazbar”.

**Topic-Filtering Query Parameters:**

- **tag (default=null):** Filter the result by the provided tag. (This requires that the tagging service be running and configured.)
  - **regex (default=null):** Filter the result by the provided regular expression. The raw regular expression should follow python re syntax, but must be url-encoded within the query-string.
-



**Attention:** All endpoints in this tree require authorization using a JWT bearer access token provided by the `POST /authenticate` or `PUT /authenticate` endpoints.

## GET /platforms/:platform/devices/:topic

Returns a collection of device points and values for a given device topic.

If no topic, or a partial topic is provided, the output will be a JSON object containing routes to additional sub-topics matching the provided partial topic. If a full topic is provided, or if the `read-all` query parameter is passed, the response will contain data and/or metadata about any points indicated by the topic. In addition to the `tag` and `regex` query parameters described in the *Use of Topics* section above, the following query parameters are accepted:

- **read-all (default=false):** If true, the response will return entries for every point. These will be a set of JSON objects with *route*, *writability*, and *value* unless the result is further filtered by the corresponding query parameters.
- **routes (default=true):** If true, the result will include the route to the points.
- **writability (default=true):** If true, the result will include the writability of the points.
- **values (default=true):** If true, the result will include the value of the points.
- **config (default=false):** If true, the result will include information about the configuration of the point.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success: 200 OK**
  - Content Type: `application/json`
  - Body:
    - \* **For partial topics, where the `read-all` query parameter is false:** This example shows a partial topic, structured as *campus/building/device/point*, where two segments were provided (the topic provided was *MyCampus/Building1*. Devices within the building are returned:

```
{
  "route_options": {
    "<device1>": "/platforms/:platform/devices/MyCampus/
↪Building1/<device1>",
    "<device2>": "/platforms/:platform/devices/MyCampus/
↪Building1/<device2>"
  }
}
```

- \* For full topics, or where a partial topic is provided and the `read-all` query parameter is true:

This example shows the result of a topic: *MyCampus/Building1/-/Point4*. Note that the wildcard selects all devices in *Building1* with a point called *Point4*. `read-all` does not need to be `true` for this case to get data, as a point segment was provided. Other query parameters were not provided or were set to their default values.

```
{
  "MyCampus/Building1/Device1/Point4": {
    "route": "/platform/:platform/devices/MyCampus/
↪Building1/Device1/Point4",
    "writable": true,
    "value": 42
  },
  {
    "MyCampus/Building1/Device2/Point4": {
      "route": "/platform/:platform/devices/MyCampus/
↪Building1/Device2/Point4",
      "writable": false,
      "value": 23
    }
  }
}
```

- With valid BEARER token on failure: 400 Bad Request

- Content Type: `application/json`
- Body:

```
{
  "error": "<Error Message>"
}
```

- With invalid BEARER token: 401 Unauthorized

## PUT /platforms/:platform/devices/:topic/

Sets the value of the specified point and returns its new value and meta-data. In addition to the tag and regex query parameters described in the Use of Topics section above, the following query parameters are accepted:

- **write-all (default=false):** If true, the response will write the given value to all points matching the topic. It is *always* necessary to set `write-all=true` if more than one point is intended to be written in response to the request.
- **confirm-values (default=false):** If true, the current value of any written points will be read and returned after the write.

**Warning:** If an attempt is made to set a point which is not writable, or if multiple points are selected using a partial topic and/or query parameters and the `write-all` query parameter is not set to `true`, the response will be 405 Method Not Allowed.

**Request:**

- Authorization: BEARER <jwt\_access\_token>
- Content Type: application/json
- Body:

```
{
  "value": <value>
}
```

**Response:**

- **With valid BEARER token on success (confirm-values=false): 200 OK**
  - Content Type: application/json
  - Body:

```
{
  "<topic>": {
    "route": "/vui/platforms/:platform/devices/:topic",
    "set_error": <null or error message>,
    "writable": <bool>
  }
}
```

- **With valid BEARER token on success (confirm-values=true): 200 OK**
  - Content Type: application/json
  - Body:

```
{
  "<topic>": {
    "route": "/vui/platforms/:platform/devices/:topic",
    "set_error": <null or error message>,
    "writable": <bool>,
    "value": <value>,
    "value_check_error": <null or error message>
  }
}
```

- **With valid BEARER token if any point is not writable: 405 Method Not Allowed:**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message indicating unwritable points>"
}
```

- **With valid BEARER token on any other failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized
- 

## DELETE /platforms/:platform/devices/:topic/

Resets the value of the specified point and returns its new value and meta-data. In addition to the tag and regex query parameters described in the Use of Topics section above, the following query parameters are accepted:

- **write-all (default=false):** If true, the response will write the given value to all points matching the topic. It is *always* necessary to set write-all=true if more than one point is intended to be written in response to the request.
- **confirm-values (default=false):** If true, the current value of any written points will be read and returned after the write.

**Warning:** If an attempt is made to set a point which is not writable, or if multiple points are selected using a partial topic and/or query parameters and the write-all query parameter is not set to true, the response will be 405 Method Not Allowed.

**Warning:** The request will also fail unless all writes are successful, and any points which would otherwise be set will be reverted to their previous value.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success (confirm-values=false):** 200 OK
  - Content Type: application/json
  - Body:

```
{
  "<topic>": {
    "route": "/vui/platforms/:platform/devices/:topic",
    "writable": <bool>
  }
}
```

- **With valid BEARER token on success (confirm-values=true):** 200 OK
  - Content Type: application/json

– Body:

```
{
  "<topic>": {
    "route": "/vui/platforms/:platform/devices/:topic",
    "writable": <bool>,
    "value": <value>,
    "value_check_error": <null or error message>
  }
}
```

- **With valid BEARER token if any point is not writable:** 405 Method Not Allowed:

– Content Type: application/json

– Body:

```
{
  "error": "<Error Message indicating unwritable points>"
}
```

- **With valid BEARER token on any other failure:** 400 Bad Request

– Content Type: application/json

– Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

## Platforms Health Endpoints

Platforms Health endpoints expose functionality associated with getting health information for all agents running on a VOLTTRON platform.

**Attention:** All Platforms Agents Health endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

### GET /platforms/:platform/health

Retrieve health information for all agents on the platform.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "<vip_identity>": {
    "peer": "<peer_name>",
    "service_agent": true|false,
    "connected": "<date_time>",
    "last_heartbeat": "<date_time>",
    "message": "<message>"
  },
  ...
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

**Platforms Historians Endpoints**

Platform Historian endpoints expose functionality related to historians running on a VOLTTRON platform.

---

**Use of Topics**

There is no special meaning to most segments of a topic in the VOLTTRON platform. In the context of devices, however, the final segment in a full topic denotes a point which can be read or actuated. Partial topics denote some collection of these point resources. For instance, in the case of a topic hierarchy organized as `:campus/:building/:device/:point`, a topic which is complete up to the `:device` level would yield a single device containing one or more points. A topic complete to the `:building` level would include a set of devices, each containing some set of points. The response to any request containing a full topic will therefore perform a get or set operation, while a partial topic will typically return a list of routes to further sub-topics (unless it is explicitly requested that an operation be performed on multiple points).

Several methods are available to refine the list of topics:

**Topic Wildcards:** The `-` character may be used alone to represent any value for a segment: `/:campus/-/:device` will match all devices with the name `:device` on the `:campus` in any building. It

is not possible to use – as a wildcard within a segment containing other characters: `/campus/foo-bar/:device` will only match a building called “foo-bar”, not one called “foobazbar”.

#### Topic-Filtering Query Parameters:

- **tag (default=null):** Filter the result by the provided tag. (This requires that the tagging service be running and configured.)
- **regex (default=null):** Filter the result by the provided regular expression. The raw regular expression should follow python re syntax, but must be url-encoded within the query-string.

**Attention:** All endpoints in this tree require authorization using a JWT bearer access token provided by the POST `/authenticate` or PUT `/authenticate` endpoints.

### GET `/platforms/:platform/historians`

Retrieve routes to historians on the platform, where each historian is listed by its VIP identity.

#### Request:

- Authorization: BEARER `<jwt_access_token>`

#### Response:

- **With valid BEARER token on success:** 200 OK
  - Content Type: `application/json`
  - Body:
- **With valid BEARER token on failure:** 400 Bad Request
  - Content Type: `application/json`
  - Body:

```
{
  "<historian>": "/vui/platforms/:platform/historians/:historian",
  "<historian>": "/vui/platforms/:platform/historians/:historian"
}
```

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

### GET /platforms/:platform/historians/:historian

Retrieve routes for an historian. The only currently supported result is the “topics” endpoint.

#### Request:

- Authorization: BEARER <jwt\_access\_token>

#### Response:

- **With valid BEARER token on success:** 200 OK

- Content Type: application/json
- Body:

```
{
  "topics": "/vui/platforms/:platform/historians/:historian/topics"
}
```

- **With valid BEARER token on failure:** 400 Bad Request

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized
- 

### GET /platforms/:platform/historians/:historian/topics/:topic

Query data for a topic. If no topic, or a partial topic is provided, the output will be a JSON object containing routes to additional sub-topics matching the provided partial topic. If a full topic is provided, or if the read-all query parameter is passed, the response will contain data and/or metadata about any points indicated by the topic. In addition to the tag and regex query parameters described in the Use of Topics section above, the following query parameters are accepted:

- **read-all (default=false):** If true, the response will return entries for every point. These will be a set of JSON objects with *route*, *writability*, and *value* unless the result is further filtered by the corresponding query parameters.
- **routes (default=true):** If true, the result will include the route to the query.
- **values (default=true):** If true, the result will include the value of the query.

Several query parameters may also be used to refine the results:

- **start (default=null):** Datetime of the start of the query.
- **end (default=null):** Datetime of the end of the query.
- **skip (default=null):** Skip this number of results (for pagination).



- **count (default=null):** Return at maximum this number of results (for pagination).
- **order (default=null):** “FIRST\_TO\_LAST” for ascending time stamps, “LAST\_TO\_FIRST” for descending time stamps.

**Attention:** Due to current limitations of the VOLTRON historian, meta-data about the queried data is only returned when a single topic has been queried. Where multiple topics are selected, the meta-data field will not be present in the result.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success (single topic):** 200 OK

- Content Type: application/json
- Body:

```
{
  "Campus/Building1/Fake2/SampleWritableFloat1": {
    "value": [
      ["<datetime>", <value>],
      ["<datetime>", <value>],
      ["<datetime>", <value>]
    ],
    "metadata": {
      "units": "<unit>",
      "type": "<data type>",
      "tz": "<time zone>"
    },
    "route": "/vui/platforms/:platform/historians/:historian/
↪historians/Campus/Building1/Fake2/SampleWritableFloat1"
  }
}
```

- **With valid BEARER token on success (multiple topics):** 200 OK

- Content Type: application/json
- Body:

```
{
  "Campus/Building1/Fake2/SampleWritableFloat1": {
    "value": [
      ["<datetime>", <value>],
      ["<datetime>", <value>],
      ["<datetime>", <value>]
    ],
    "route": "/vui/platforms/:platform/historians/:historian/
↪historians/Campus/Building1/Fake2/SampleWritableFloat1"
  },
  "Campus/Building1/Fake2/SampleWritableFloat2": {
```

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```
    "value": [
      ["<datetime>", <value>],
      ["<datetime>", <value>],
      ["<datetime>", <value>]
    ],
    "route": "/vui/platforms/:platform/historians/:historian/
↪historians/Campus/Building1/Fake2/SampleWritableFloat2"
  }
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**

## Platforms PubSub Endpoints

PubSub endpoints expose functionality associated with publication and subscription to topics on the VOLTTRON message bus.

**Attention:** All endpoints in this tree require authorization using a JWT bearer access token provided by the POST /authenticate or PUT /authenticate endpoints.

### GET /platforms/:platform/pubsub

Retrieve routes for message bus topics being monitored by this user of the VUI API.

#### Request:

- Authorization: BEARER <jwt\_access\_token>

#### Response:

- **With valid BEARER token on success: 200 OK**

- Body:

```
[
  "/vui/platform/:platform/pubsub/:topic",
  "/vui/platform/:platform/pubsub/:topic"
]
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

## GET /platforms/:platform/pubsub/:topic

Return a subscription to the topic.

**Attention:** Unique to the API, this endpoint is used to open a websocket which allows the subscription data to be pushed to the client as it arrives on the message bus. As such, several additional headers are required in the request, and the client will need to appropriately process the response in accordance with the websocket protocol to keep the websocket open and process incoming push data.

### Request:

- Authorization: BEARER <jwt\_access\_token>
- Connection: Upgrade
- Upgrade: websocket
- Sec-WebSocket-Key: <calculated at runtime>
- Sec-WebSocket-Version: 13
- Sec-WebSocket-Extensions: permessage-deflate; client\_max\_window\_bits

### Response:

- **With valid BEARER token on success:** 101 Switching Protocols
  - Upgrade: websocket
  - Connection: Upgrade
  - Sec-WebSocket-Version: 13
  - Sec-WebSocket-Accept: <calculated at runtime>
- **With valid BEARER token on failure:** 400 Bad Request
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized
- 

### **PUT /platforms/:platform/pubsub/:topic**

Publish to the specified topic on the specified platform and return confirmation details.

The value given in the request body must contain the intended publish body. The request body should be a JSON object where the `headers` key contains headers for the VOLTTRON message bus and the `message` key contains the message body. The message body may be a single value, JSON object, or other value as expected by subscribers to the topic.

#### **Request:**

- Content Type: `application/json`
- Authorization: `BEARER <jwt_access_token>`
- Body:

```
{
  "headers": {<message_bus_headers>},
  "message": <message body>
}
```

#### **Response:**

- **With valid BEARER token on success:** 200 OK
  - Content Type: `application/json`
  - Body:
- **With valid BEARER token on failure:** 400 Bad Request
  - Content Type: `application/json`
  - Body:

```
{
  "number_of_subscribers": <number_of_subscribers>
}
```

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized
-

## DELETE /platforms/:platform/pubsub/:topic

Unsubscribe to the topic.

**Attention:** If multiple subscriptions are open to the same topic, the server will remove this subscriber but keep the subscription resource open.

### Request:

- Authorization: BEARER <jwt\_access\_token>

### Response:

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

## Platforms Status Endpoints

Platforms Status endpoints expose functionality associated with getting and resetting the status of all agents running on a VOLTRON platform.

**Attention:** All Platforms Status endpoints require a JWT bearer token obtained through the `POST /authenticate` or `PUT /authenticate` endpoints.

---

## GET /platforms/:platform/status

Get status for all agents on the platform.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success: 200 OK**

- Content Type: application/json
- Body:

```
{
  "<vip_identity>": {
    "name": "<wheel_name>",
    "uuid": "<uuid>",
    "tag": "<tag>",
    "priority": "<int>",
    "running": <true|false>,
    "enabled": <true|false>,
    "pid": <int>,
    "exit_code": <null|int>
  },
  ...
}
```

- **With valid BEARER token on failure: 400 Bad Request**

- Content Type: application/json
- Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token: 401 Unauthorized**
- 

**DELETE /platforms/:platform/status**

Clear status for all agents on the platform. This will not affect the status of running agents, but will clear exit codes and process ids for agents which have been previously running and are now stopped.

**Request:**

- Authorization: BEARER <jwt\_access\_token>

**Response:**

- **With valid BEARER token on success:** 204 No Content
- **With valid BEARER token on failure: 400 Bad Request**
  - Content Type: application/json
  - Body:

```
{
  "error": "<Error Message>"
}
```

- **With invalid BEARER token:** 401 Unauthorized

## 2.9 Agents Overview

Agents in VOLTRON can be loosely defined as software modules communicating on the platform which perform some function on behalf of the user. Agents may perform a huge variety of tasks, but common use cases involve data collection, control of ICS and IOT devices, and various platform management tasks. Agents implemented using the VOLTRON agent framework inherit a number of capabilities, including message bus connectivity and agent lifecycle.

**Attention:** Agents are split into the directories of **core**, **contributed**, **operations** and **unsupported**.

```
services/contrib/
services/core/
services/ops/
services/unsupported/
```

Agents deployed on VOLTRON can perform one or more roles which can be broadly classified into the following groups:

- **Platform Agents:** Agents which are part of the platform and provide a service to other agents. Examples are the Actuator and Platform Driver agents which serve as interfaces between control agents and drivers.
- **Control Agents:** These agents implement algorithms to control the devices of interest and interact with other resources to achieve some goal.
- **Service Agents:** These agents perform various data collection or platform management services. Agents in this category include weather service agents which collect weather data from remote sources or operations agents which help users maintain situational awareness of their deployment.
- **Cloud Agents:** These agents represent a remote application which needs access to the messages and data on the platform. This agent would subscribe to topics of interest to the remote application and would also allow it publish data to the platform.

The platform includes some valuable services which can be leveraged by agents:

- **Message Bus:** All agents and services publish and subscribe to topics on the message bus. This provides a single interface that abstracts the details of devices and agents from each other. Components in the platform basically produce and consume events.
- **Configuration Store:** Using the configuration store, agent operations can be altered ad-hoc without significant disruption or downtime.

- **Historian Framework:** Historian agents automatically collect data from a subset of topics on the message bus and store them in a data store of choice. Currently SQL, MongoDB, CrateDB and other historians exist, and more can be developed to fit the needs of a deployment by inheriting from the base historian. The base historian has been developed to be fast and reliable, and to handle many common pitfalls of data collection over a network.
- **Weather Information:** These agents periodically retrieve data from the a remote weather API then format the response and publish it to the platform message bus on a weather topic.
- **Device interfaces:** Drivers publish device data onto the message bus and send control signals issued from control agents to the corresponding device. Drivers are capable of handling the locking of devices to prevent multiple conflicting directives.
- **Application Scheduling:** This service allows the scheduling of agents' access to devices in order to prevent conflicts.
- **Logging service:** Agents can publish arbitrary strings to a logging topic and this service will push them to a historian for later analysis.

## 2.10 Core Services

Agents which support the most common use cases of the platform. For details on each, please refer to the corresponding documents.

**Attention:** All core agents are located within the **core** directory.

```
services/core/
```

### 2.10.1 Platform Driver Agent

The Platform Driver Agent manages all device communication. To communicate with devices you must setup and deploy the Platform Driver Agent. For more information on the Platform Driver Agent's operations, read about the *Platform Driver* in the driver framework docs.

#### Configuring the Platform Driver

The Platform Driver requires a configuration file (described in brief below) to set global settings for all drivers. Once the user has copied the example or created their own config, the Platform Driver Agent is deployed with this command:

```
python scripts/install-agent.py -s services/core/PlatformDriverAgent -c <platform_  
↪driver config file>
```

#### Requirements

VOLTTRON drivers operated by the platform driver may have additional requirements for installation. Required libraries:

```
BACnet driver - bacpypes  
Modbus driver - pymodbus  
Modbus_TK driver - modbus-tk  
DNP3 and IEEE 2030.5 drivers - pydnp3
```



The easiest way to install the requirements for drivers included in the VOLTTRON repository is to use `bootstrap.py` (see [platform installation for more detail](#))

```
python bootstrap.py --drivers
```

## Platform Driver Agent Configuration

The Platform Driver Agent configuration consists of general settings for all devices. Below is an example config from the repository:

```
{
    "driver_scrape_interval": 0.05,
    "publish_breadth_first_all": false,
    "publish_depth_first": false,
    "publish_breadth_first": false
}
```

The example platform driver configuration file above can be found in the VOLTTRON repository in *services/core/PlatformDriverAgent/platform-driver.agent*.

For information on configuring the Platform Driver with devices, including creating driver configs and using the config store, please read the [configuration](#) section in the Driver Framework docs.

## Global Override Specification

This document describes the specification for the global override feature. By default, every user is allowed write access to the devices by the platform driver. The override feature will allow the user (for example, a building administrator) to override this default behavior and enable the user to lock the write access on the devices for a specified duration of time or indefinitely.

## Functional Capabilities

1. User shall be able to specify the following when turning on the override behavior on the devices.
  - Override pattern examples:
    - If pattern is `campus/building1/*` - Override condition is turned on for all the devices under *campus/building1/*.
    - If pattern is `campus/building1/ahul` - Override condition is turned on for only *campus/building1/ahul*
    - The pattern matching shall use bash style filename matching semantics.
  - Time duration over which override behavior is applicable - If the time duration is negative, then the override condition is applied indefinitely.
  - Optional *revert-to-fail-safe-state* flag - If the flag is set, the platform driver shall set all the set points falling under the override condition to its default state/value immediately. This is to ensure that the devices are in fail-safe state when the override/lock feature is removed. If the flag is not set, the device state/value is untouched.
  - Optional staggered revert flag - If this flag is set, reverting of devices will be staggered.
2. User shall be able to disable/turn off the override behavior on devices by specifying:

- Pattern on which the override/lock feature has be disabled. (example: `campus/building/\*`)
3. User shall be able to get a list of all the devices with the override condition set.
  4. User shall be able to get a list of all the override patterns that are currently active.
  5. User shall be able to clear all the overrides.
  6. Any changes to override patterns list shall be stored in the config store. On startup, list of override patterns and corresponding end times are retrieved from the config store. If the end time is indefinite or greater than current time for any pattern, then override is set on the matching devices for remaining duration of time.
  7. Whenever a device is newly configured, a check is made to see if it is part of the overridden patterns. If yes, it is added to list of overridden devices.
  8. When a device is being removed, a check is made to see if it is part of the overridden devices. If yes, it is removed from the list of overridden devices.

### Driver RPC Methods

- *set\_override\_on(pattern, duration=0.0, failsafe\_revert=True, staggered\_revert=True)* - Turn on override condition on all the devices matching the pattern. Time duration for the override condition has to be in seconds. For indefinite duration, the time duration has to be  $\leq 0.0$ .
- *set\_override\_off(pattern)* - Turn off override condition on all the devices matching the pattern. The specified pattern will be removed from the override patterns list. All the devices falling under the given pattern will be removed from the list of overridden devices.
- *get\_override\_devices()* - Get a list of all the devices with override condition.
- *get\_override\_patterns()* - Get a list of override patterns that are currently active.
- *clear\_overrides()* - Clear all the overrides.

## 2.10.2 Market Service Agent

### Introduction

The Market Service Agent implements a variation of a double-blind auction, in which each market participant bids to buy or sell a commodity for a given price.

In contrast to other common implementations, participants do not bid single price-quantity pairs. Instead, they bid a price-quantity curve, or “flexibility curve” into their respective markets. Market participants may be both buyers in one market and sellers in another.

Settling of the market is a “single shot” process that begins with bidding that progresses from the bottom up and concludes with a clearing of the markets from the top down. This is termed “single shot” because there is no iteration required to find the clearing price or quantity at any level of the market structure.

Once the market has cleared, the process begins again for the next market interval, and new bids are submitted based on the updated states of the agents.

## Requirements

The Market Service Agent requires the *Transitions* (version 0.6.9) and *NumPy* (version 1.15.4) packages. These packages can be installed in an activated environment with:

```
pip install transitions==0.6.9
pip install numpy==1.15.4
```

## Market Timing

The MarketServiceAgent is driven by the Director. The Director drives the MarketServiceAgent through a timed loop. The Director has just a few parameters that are configured by default with adequate values. They are:

1. The market\_period with a default value of 5 minutes
2. The reservation\_delay with a default value of 0 minutes
3. The offer\_delay with a default value of 2 minutes

The timing loop works as follows:

- The market period begins.
- A request for reservations is published after the reservation delay.
- A request for offers/bids is published after the offer delay.
- The aggregate demand curve is published as soon all the buy offers are completed for the market.
- The aggregate supply curve is published as soon all the sell offers are completed for the market.
- The cleared price is published as soon as all bids have been received.
- Error messages are published when discovered and usually occur at the end of one of the delays.
- The cycle repeats.

## How to Use the MarketServiceAgent

A given agent participates in one or more markets by inheriting from the *base MarketAgent*. The base MarketAgent handles all of the communication between the agent and the MarketServiceAgent. The agent only needs to join each market with the `join_market` method and then respond to the appropriate callback methods. The callback methods are described at the *base MarketAgent*.

### 2.10.3 DNP3 Agent

**DNP3** (Distributed Network Protocol) is a set of communications protocols that are widely used by utilities such as electric power companies, primarily for **SCADA** purposes. It was adopted in 2010 as **IEEE Std 1815-2010**, later updated to **1815-2012**.

VOLTTRON's DNP3 Agent is an implementation of a DNP3 Outstation as specified in IEEE Std 1815-2012. It engages in bidirectional network communications with a DNP3 Master, which might be located at a power utility.

Like some other VOLTTRON protocol agents (e.g. `IEEE2030_5Agent`), the DNP3 Agent can optionally be front-ended by a DNP3 device driver running under VOLTTRON's PlatformDriverAgent. This allows a DNP3 Master to be treated like any other device in VOLTTRON's ecosystem.

The VOLTTRON DNP3 Agent implementation of an Outstation is built on PyDNP3, an open-source library from Kisenum containing Python language bindings for Automatak's C++ `opendnp3` library, the de facto reference implementation of DNP3.

The DNP3 Agent exposes DNP3 application-layer functionality, creating an extensible base from which specific custom behavior can be designed and supported. By default, the DNP3 Agent acts as a simple transfer agent, publishing data received from the Master on the VOLTTRON Message Bus, and responding to RPCs from other VOLTTRON agents by sending data to the Master.

## Requirements

PyDNP3 can be installed in an activated environment with:

```
pip install pydnp3
```

## RPC Calls

The DNP3 Agent exposes the following VOLTTRON RPC calls:

```
def get_point(self, point_name):
    """
        Look up the most-recently-received value for a given output point.

        @param point_name: The point name of a DNP3 PointDefinition.
        @return: The (unwrapped) value of a received point.
    """

def get_point_by_index(self, group, index):
    """
        Look up the most-recently-received value for a given point.

        @param group: The group number of a DNP3 point.
        @param index: The index of a DNP3 point.
        @return: The (unwrapped) value of a received point.
    """

def get_points(self):
    """
        Look up the most-recently-received value of each configured output point.

        @return: A dictionary of point values, indexed by their VOLTTRON point names.
    """

def set_point(self, point_name, value):
    """
        Set the value of a given input point.

        @param point_name: The point name of a DNP3 PointDefinition.
        @param value: The value to set. The value's data type must match the one in the
        ↪ DNP3 PointDefinition.
    """

def set_points(self, point_list):
    """
        Set point values for a dictionary of points.
```

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```

    @param point_list: A dictionary of {point_name: value} for a list of DNP3 points
    ↪to set.
    """

def config_points(self, point_map):
    """
        For each of the agent's points, map its VOLTTRON point name to its DNP3 group
    ↪and index.

        @param point_map: A dictionary that maps a point's VOLTTRON point name to its
    ↪DNP3 group and index.
    """

def get_point_definitions(self, point_name_list):
    """
        For each DNP3 point name in point_name_list, return a dictionary with each of
    ↪the point definitions.

        The returned dictionary looks like this:

        {
            "point_name1": {
                "property1": "property1_value",
                "property2": "property2_value",
                ...
            },
            "point_name2": {
                "property1": "property1_value",
                "property2": "property2_value",
                ...
            }
        }

        If a definition cannot be found for a point name, it is omitted from the
    ↪returned dictionary.

        :param point_name_list: A list of point names.
        :return: A dictionary of point definitions.
    """

```

## Pub/Sub Calls

The DNP3 Agent uses two topics when publishing data to the VOLTTRON message bus:

- **Point Values (default topic: ``dnp3/point``):** As the DNP3 Agent communicates with the Master, it publishes received point values on the VOLTTRON message bus.
- **Outstation status (default topic: `dnp3/status`):** If the status of the DNP3 Agent outstation changes, for example if it is restarted, it publishes its new status on the VOLTTRON message bus.

## Data Dictionary of Point Definitions

The DNP3 Agent loads and uses a data dictionary of point definitions, which are maintained by agreement between the (DNP3 Agent) Outstation and the DNP3 Master. The data dictionary is stored in the agent's registry.

## Current Point Values

The DNP3 Agent tracks the most-recently-received value for each point definition in its data dictionary, regardless of whether the point value's source is a VOLTTRON RPC call or a message from the DNP3 Master.

## Agent Configuration

The DNP3Agent configuration file specifies the following fields:

- **local\_ip:** (string) Outstation's host address (DNS resolved). Default: 0.0.0.0.
- **port:** (integer) Outstation's port number - the port that the remote endpoint (Master) is listening on. Default: 20000.
- **point\_topic:** (string) VOLTTRON message bus topic to use when publishing DNP3 point values. Default: dnp3/point.
- **outstation\_status\_topic:** (string) Message bus topic to use when publishing outstation status. Default: dnp3/outstation\_status.
- **outstation\_config:** (dictionary) Outstation configuration parameters. All are optional. Parameters include:
  - **database\_sizes:** (integer) Size of each outstation database buffer. Default: 10.
  - **event\_buffers:** (integer) Size of the database event buffers. Default: 10.
  - **allow\_unsolicited:** (boolean) Whether to allow unsolicited requests. Default: True.
  - **link\_local\_addr:** (integer) Link layer local address. Default: 10.
  - **link\_remote\_addr:** (integer) Link layer remote address. Default: 1.
  - **log\_levels:** (list) List of bit field names (*OR'd* together) that filter what gets logged by DNP3. Default: NORMAL. Possible values: ALL, ALL\_APP\_COMMS, ALL\_COMMS, NORMAL, NOTHING.
  - **threads\_to\_allocate:** (integer) Threads to allocate in the manager's thread pool. Default: 1.

A sample DNP3 Agent configuration file is available in *services/core/DNP3Agent/config*.

## VOLTTRON DNP3 Device Driver

VOLTTRON's DNP3 device driver exposes *get\_point/set\_point* RPC calls and scrapes for DNP3 points.

The driver periodically issues DNP3Agent RPC calls to refresh its cached representation of DNP3 data. It issues RPC calls to the DNP3 Agent as needed when responding to *get\_point*, *set\_point* and *scrape\_all* calls.

For information about the DNP3 driver, see [DNP3 Driver](#).

## Installing the DNP3 Agent

To install DNP3Agent, please consult the installation advice in *services/core/DNP3Agent/README.md*. *README.md* specifies a default agent configuration, which can be overridden as needed.

An agent installation script is available:

```
$ export VOLTTRON_ROOT=<volttron github install directory>
$ cd $VOLTTRON_ROOT
$ source services/core/DNP3Agent/install_dnp3_agent.sh
```

When installing the Mesa Agent, please note that the agent's point definitions must be loaded into the agent's config store. See *install\_dnp3\_agent.sh* for an example of how to load them.

### 2.10.4 Mesa Agent

The Mesa Agent is a VOLTTRON agent that handles MESA-ESS DNP3 outstation communications. It subclasses and extends the functionality of VOLTTRON's DNP3 Agent. Like the DNP3 Agent, the Mesa Agent models a DNP3 outstation, communicating with a DNP3 master.

For a description of DNP3 and the VOLTTRON DNP3 agent, please refer to the [DNP3 Agent documentation](#).

VOLTTRON's Mesa Agent and DNP3 Agent are implementations of a DNP3 Outstation as specified in IEEE Std 1815-2012. They engage in bidirectional network communications with a DNP3 Master, which might be located at a power utility.

MESA-ESS is an extension and enhancement to DNP3. It builds on the basic DNP3 communications protocol, adding support for more complex structures, including functions, arrays, curves and schedules. The draft specification for MESA-ESS, as well as a spreadsheet of point definitions, can be found at <http://mesastandards.org/mesa-standards/>.

VOLTTRON's DNP3 Agent and Mesa Agent implementations of an Outstation are built on *pydnp3*, an open-source library from Kisenum containing Python language bindings for Automatak's C++ *opendnp3* library, the de-facto reference implementation of DNP3.

MesaAgent exposes DNP3 application-layer functionality, creating an extensible base from which specific custom behavior can be designed and supported, including support for MESA functions, arrays and selector blocks. By default, the Mesa Agent acts as a simple transfer agent, publishing data received from the Master on the VOLTTRON Message Bus, and responding to RPCs from other VOLTTRON agents by sending data to the Master. Properties of the point and function definitions also enable the use of more complex controls for point data capture and publication.

The Mesa Agent was developed by Kisenum for use by 8minutenergy, which provided generous financial support for the open-source contribution to the VOLTTRON platform, along with valuable feedback based on experience with the agent in a production context.

## RPC Calls

The Mesa Agent exposes the following VOLTTRON RPC calls:

```
def get_point(self, point_name):
    """
        Look up the most-recently-received value for a given output point.

        @param point_name: The point name of a DNP3 PointDefinition.
        @return: The (unwrapped) value of a received point.
    """
```

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```

def get_point_by_index(self, data_type, index):
    """
        Look up the most-recently-received value for a given point.

        @param data_type: The data_type of a DNP3 point.
        @param index: The index of a DNP3 point.
        @return: The (unwrapped) value of a received point.
    """

def get_points(self):
    """
        Look up the most-recently-received value of each configured output point.

        @return: A dictionary of point values, indexed by their point names.
    """

def get_configured_points(self):
    """
        Look up the most-recently-received value of each configured point.

        @return: A dictionary of point values, indexed by their point names.
    """

def set_point(self, point_name, value):
    """
        Set the value of a given input point.

        @param point_name: The point name of a DNP3 PointDefinition.
        @param value: The value to set. The value's data type must match the one in the
        ↪DNP3 PointDefinition.
    """

def set_points(self, point_dict):
    """
        Set point values for a dictionary of points.

        @param point_dict: A dictionary of {point_name: value} for a list of DNP3 points
        ↪to set.
    """

def config_points(self, point_map):
    """
        For each of the agent's points, map its VOLTTRON point name to its DNP3 group
        ↪and index.

        @param point_map: A dictionary that maps a point's VOLTTRON point name to its
        ↪DNP3 group and index.
    """

def get_point_definitions(self, point_name_list):
    """
        For each DNP3 point name in point_name_list, return a dictionary with each of
        ↪the point definitions.

        The returned dictionary looks like this:

        {

```

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```

        "point_name1": {
            "property1": "property1_value",
            "property2": "property2_value",
            ...
        },
        "point_name2": {
            "property1": "property1_value",
            "property2": "property2_value",
            ...
        }
    }

```

If a definition cannot be found for a point name, it is omitted from the returned dictionary.

```

:param point_name_list: A list of point names.
:return: A dictionary of point definitions.
"""

```

```

def get_selector_block(self, point_name, edit_selector):
    """
    Return a dictionary of point values for a given selector block.

    :param point_name: Name of the first point in the selector block.
    :param edit_selector: The index (edit selector) of the block.
    :return: A dictionary of point values.
    """

```

```

def reset(self):
    """
    Reset the agent's internal state, emptying point value caches. Used during
    iterative testing.
    """

```

## Pub/Sub Calls

MesaAgent uses three topics when publishing data to the VOLTTRON message bus:

- **Point Values (default topic: dnp3/point):** As the Mesa Agent communicates with the Master, it publishes received point values on the VOLTTRON message bus.
- **Functions (default topic: mesa/function):** When the Mesa Agent receives a function step with a “publish” action value, it publishes the current state of the function (all steps received to date) on the VOLTTRON message bus.
- **Outstation status (default topic: mesa/status):** If the status of the Mesa Agent outstation changes, for example if it is restarted, it publishes its new status on the VOLTTRON message bus.

## Data Dictionaries of Point and Function Definitions

The Mesa Agent loads and uses data dictionaries of point and function definitions, which are maintained by agreement between the (Mesa Agent) Outstation and the DNP3 Master. The data dictionaries are stored in the agent's registry.

## Current Point Values

The Mesa Agent tracks the most-recently-received value for each point definition in its data dictionary, regardless of whether the point value's source is a VOLTTRON RPC call or a message from the DNP3 Master.

## Agent Configuration

The Mesa Agent configuration specifies the following fields:

- **local\_ip:** (string) Outstation's host address (DNS resolved). Default: 0.0.0.0.
- **port:** (integer) Outstation's port number - the port that the remote endpoint (Master) is listening on. Default: 20000.
- **point\_topic:** (string) VOLTTRON message bus topic to use when publishing DNP3 point values. Default: dnp3/point.
- **function\_topic:** (string) Message bus topic to use when publishing MESA-ESS functions. Default: mesa/function.
- **outstation\_status\_topic:** (string) Message bus topic to use when publishing outstation status. Default: mesa/outstation\_status.
- **all\_functions\_supported\_by\_default:** (boolean) When deciding whether to reject points for unsupported functions, ignore the values of their 'supported' points: simply treat all functions as supported. Used primarily during testing. Default: False.
- **function\_validation:** (boolean) When deciding whether to support sending single points to the Mesa Agent. If *function\_validation* is True, the Mesa Agent will raise an exception when receiving any invalid point in current function. If *function\_validation* is False, Mesa Agent will reset current function to None instead of raising the exception. Default: False.
- **outstation\_config:** (dictionary) Outstation configuration parameters. All are optional. Parameters include:
  - **database\_sizes:** (integer) Size of each outstation database buffer. Default: 10.
  - **event\_buffers:** (integer) Size of the database event buffers. Default: 10.
  - **allow\_unsolicited:** (boolean) Whether to allow unsolicited requests. Default: True.
  - **link\_local\_addr:** (integer) Link layer local address. Default: 10.
  - **link\_remote\_addr:** (integer) Link layer remote address. Default: 1.
  - **log\_levels:** (list) List of bit field names (OR'd together) that filter what gets logged by DNP3. Default: [NORMAL]. Possible values: ALL, ALL\_APP\_COMMS, ALL\_COMMS, NORMAL, NOTHING.
  - **threads\_to\_allocate:** (integer) Threads to allocate in the manager's thread pool. Default: 1.

A sample Mesa Agent configuration file is available in `services/core/DNP3Agent/mesaagent.config`.

## Installing the Mesa Agent

To install the Mesa Agent, please consult the installation advice in `services/core/DNP3Agent/README.md`, which includes advice on installing `pydnp3`, a library upon which the DNP3 Agent depends.

After installing libraries as described in the Mesa Agent *README.md* file, the agent can be installed from a command-line shell as follows:

```
$ export VOLTTTRON_ROOT=<voltttron github install directory>
$ cd $VOLTTTRON_ROOT
$ source services/core/DNP3Agent/install_mesa_agent.sh
```

*README.md* specifies a default agent configuration, which can be overridden as needed.

Here are some things to note when installing the Mesa Agent:

- The Mesa Agent source code resides in, and is installed from, a DNP3 subdirectory, thus allowing it to be implemented as a subclass of the base DNP3 agent class. When installing the Mesa Agent, inform the install script that it should build from the *mesa* subdirectory by exporting the following environment variable:

```
$ export AGENT_MODULE=dnp3.mesa.agent
```

- The agent's point and function definitions must be loaded into the agent's config store. See the `install_mesa_agent.sh` script for an example of how to load them.

### 2.10.5 External Data Publisher Agent

The External Data Publisher agent (`ExternalData`) was created to fetch data from remote APIs based on configured values and publish the remote data on the VOLTTTRON message bus. The agent is primarily an agent wrapper around the requests library that sends the request then broadcast it via VIP pub/sub publish.

#### Configuration Options

The following JSON configuration file shows all the options currently supported by the `ExternalData` agent. Configuration values specify the interval between remote data polling requests, default authentication for remote API calls, VOLTTTRON message bus publish topics, and for defining the remote API request behavior. Below is an example configuration file with additional parameter documentation.

```
{
  #Interval at which to scrape the sources.
  "interval":300,

  #Global topic prefix for all publishes.
  "global_topic_prefix": "record",

  #Default user name and password if all sources require the same
  #credentials. Can be overridden in individual sources.
  #"default_user":"my_user_name",
  #"default_password" : "my_password",

  "sources":
  [
    {
      #Valid types are "csv", "json", and "raw"
```

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```

#Defaults to "raw"
"type": "csv",
#Source URL for CSV data.
"url": "https://example.com/example",

#URL parameters for data query (optional).
# See https://en.wikipedia.org/wiki/Query_string
"params": {"period": "currentinterval",
           "format": "csv"},

#Topic to publish on.
"topic": "example/examplecsvdata1",

#Column used to break rows in CSV out into separate publishes.
#The key will be removed from the row data and appended to the end
# of the publish topic.
# If this option is missing the entire CSV will be published as a list
# of objects.
#If the column does not exist nothing will be published.
"key": "Key Column",

#Attempt to parse these columns in the data into numeric types.
#Currently columns are parsed with ast.literal_eval()
#Values that fail to parse are left as strings unless the
# values is an empty string. Empty strings are changed to None.
"parse": ["Col1", "Col2"],

#Source specific authentication.
"user": "username",
"password" : "password"
},
{
#Valid types are "csv", "json", and "raw"
#Defaults to "raw"
"type": "csv",
#Source URL for CSV data.
"url": "https://example.com/example_flat",

#URL parameters for data query (optional).
# See https://en.wikipedia.org/wiki/Query_string
"params": {"format": "csv"},

#Topic to publish on. (optional)
"topic": "example/examplecsvdata1",

#If the rows in a csv represent key/value pairs use this
#setting to reduce this format to a single object for publishing.
"flatten": true,

#Attempt to parse these columns in the data into numeric types.
#Currently columns are parsed with ast.literal_eval()
#Values that fail to parse are left as strings unless the
# values is an empty string. Empty strings are changed to None.
"parse": ["Col1", "Col2"]
},
{
#Valid types are "csv", "json", and "raw"

```

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```

#Defaults to "raw"
"type": "json",
#Source URL for JSON data.
"url": "https://example.com/api/example1",

#URL parameters for data query (optional)
# See https://en.wikipedia.org/wiki/Query_string
"params": {"format": "json"},

#Topic to publish on. (optional)
"topic": "example/exampledata1",

#Path to desired data withing the JSON. Optional.
#Elements in a path may be either a string or an integer.
#Useful for peeling off unneeded layers around the wanted data.
"path": ["parentobject", "0"],

#After resolving the path above if the resulting data is a list
# the key is the path to a value in a list item. Each item in the list
# is published separately with the key appended to the end of the topic.
# Elements in a key may be a string or an integer. (optional)
"key": ["Location", "$"],

#Source specific authentication.
"user": "username",
"password" : "password"
}
]
}

```

### 2.10.6 IEEE 2030.5 DER Agent

The IEEE 2030.5 Agent (IEEE2030\_5 in the VOLTRON repository) implements a IEEE 2030.5 server that receives HTTP *POST/PUT* requests from IEEE 2030.5 devices. The requests are routed to the IEEE 2030.5 Agent over the VOLTRON message bus by VOLTRON's Master Web Service. The IEEE 2030.5 Agent returns an appropriate HTTP response. In some cases (e.g., DERControl requests), this response includes a data payload.

The IEEE 2030.5 Agent maps IEEE 2030.5 resource data to a VOLTRON IEEE 2030.5 data model based on SunSpec, using block numbers and point names as defined in the SunSpec Information Model, which in turn is harmonized with 61850. The data model is given in detail below.

Each device's data is stored by the IEEE 2030.5 Agent in an *EndDevice* memory structure. This structure is not persisted to a database. Each *EndDevice* retains only the most recently received value for each field.

The IEEE2030\_5 Agent exposes RPC calls for getting and setting EndDevice data.

## VOLTTRON IEEE 2030.5 Device Driver

The *IEEE 2030.5 device driver* is a new addition to VOLTTRON Platform Driver Agent's family of standard device drivers. It exposes `get_point/set_point` calls for IEEE 2030.5 EndDevice fields.

The IEEE 2030.5 device driver periodically issues IEEE2030\_5 Agent RPC calls to refresh its cached representation of EndDevice data. It issues RPC calls to IEEE2030\_5Agent as needed when responding to `get_point`, `set_point` and `scrape_all` calls.

### Field Definitions

These field IDs correspond to the ones in the IEEE 2030.5 device driver's configuration file, `ieee2030_5.csv`. They have been used in that file's "Volltron Point Name" column and also in its "Point Name" column.

Field ID	IEEE 2030.5 Resource/Property	Description	Units	Type
b1_Md	<b>device_information</b> mfModel	Model (32 char lim).		string
b1_Opt	<b>device_information</b> lfdi	Long-form device identifier (32 char lim).		string
b1_SN	<b>abstract_device</b> sfdi	Short-form device identifier (32 char lim).		string
b1_Vr	<b>device_information</b> mfHwVer	Version (16 char lim).		string
b113_A	<b>mirror_meter_reading</b> PhaseCurrentAvg	AC current.	A	float
b113_DCA	<b>mirror_meter_reading</b> InstantPackCurrent	DC current.	A	float
b113_DCV	<b>mirror_meter_reading</b> LineVoltageAvg	DC voltage.	V	float
b113_DCW	<b>mirror_meter_reading</b> PhasePowerAvg	DC power.	W	float
b113_PF	<b>mirror_meter_reading</b> PhasePFA	AC power factor.	%	float
b113_WH	<b>mirror_meter_reading</b> EnergyIMP	AC energy.	Wh	float
b120_AhrRtg	<b>der_capability</b> rtgAh	Usable capacity of the battery. Maximum charge minus minimum charge.	Ah	float
b120_ARtg	<b>der_capability</b> rtgA	Maximum RMS AC current level capability of the inverter.	A	float
b120_MaxChaRte	<b>der_capability</b> rtgMaxChargeRate	Maximum rate of energy transfer into the device.	W	float
b120_MaxDisChaRte	<b>der_capability</b> rtgMaxDischargeRate	Maximum rate of energy transfer out of the device.	W	float
b120_WHRtg	<b>der_capability</b> rtgWh	Nominal energy rating of the storage device.	Wh	float
<b>2.10. Core Services</b>				<b>167</b>
b120_WRtg	<b>der_capability</b> rtgW	Continuous power output capability of the inverter.	W	float

## Revising and Expanding the Field Definitions

The IEEE 2030.5-to-SunSpec field mappings in this implementation are a relatively thin subset of all possible field definitions. Developers are encouraged to expand the definitions.

The procedure for expanding the field mappings requires you to make changes in two places:

1. Update the driver's point definitions in `services/core/PlatformDriverAgent/platform_driver/ieee2030_5.csv`
2. Update the IEEE 2030.5-to-SunSpec field mappings in `services/core/IEEE2030_5Agent/ieee2030_5/end_device.py` and `__init__.py`

When updating VOLTTRON's IEEE 2030.5 data model, please use field IDs that conform to the SunSpec block-number-and-field-name model outlined in the SunSpec Information Model Reference (see the link below).

View the [IEEE 2030.5 agent specification document](#) to learn more about IEEE 2030.5 and the IEEE 2030.5 agent and driver.

## IEEE 2030.5 DER Support

Version 1.0

Smart Energy Profile 2.0 (SEP 2.0, IEEE 2030.5) specifies a REST architecture built around the core HTTP verbs: GET, HEAD, PUT, POST and DELETE. A specification for the IEEE 2030.5 protocol can be found [here](#).

IEEE 2030.5 EndDevices (clients) POST XML resources representing their state, and GET XML resources containing command and control information from the server. The server never reaches out to the client unless a “subscription” is registered and supported for a particular resource type. This implementation does not use IEEE 2030.5 registered subscriptions.

The IEEE 2030.5 specification requires HTTP headers, and it explicitly requires RESTful response codes, for example:

- 201 - “Created”
- 204 - “No Content”
- 301 - “Moved Permanently”
- etc.

IEEE 2030.5 message encoding may be either XML or EXI. Only XML is supported in this implementation.

IEEE 2030.5 requires HTTPS/TLS version 1.2 along with support for the cipher suite `TLS_ECDHE_ECDSA_WITH_AES_128_CCM_8`. Production installation requires a certificate issued by a IEEE 2030.5 CA. The encryption requirement can be met by using a web server such as Apache to proxy the HTTPs traffic.

IEEE 2030.5 discovery, if supported, must be implemented by an xmDNS server. Avahi can be modified to perform this function.



## Function Sets

IEEE 2030.5 groups XML resources into “Function Sets.” Some of these function sets provide a core set of functionality used across higher-level function sets. This implementation implements resources from the following function sets:

- Time
- Device Information
- Device Capabilities
- End Device
- Function Set Assignments
- Power Status
- Distributed Energy Resources

## Distributed Energy Resources (DERs)

Distributed energy resources (DERs) are devices that generate energy, e.g., solar inverters, or store energy, e.g., battery storage systems, electric vehicle supply equipment (EVSEs). These devices are managed by a IEEE 2030.5 DER server using DERPrograms which are described by the IEEE 2030.5 specification as follows:

Servers host one or more DERPrograms, which in turn expose DERControl events to DER clients. DERControl instances contain attributes that allow DER clients to respond to events that are targeted to their device type. A DERControl instance also includes scheduling attributes that allow DER clients to store and process future events. These attributes include start time and duration, as well an indication of the need for randomization of the start and / or duration of the event. The IEEE 2030.5 DER client model is based on the SunSpec Alliance Inverter Control Model [SunSpec] which is derived from IEC 61850-90-7 [61850] and [EPRI].

EndDevices post multiple IEEE 2030.5 resources describing their status. The following is an example of a Power Status resource that might be posted by an EVSE (vehicle charging station):

```
<PowerStatus xmlns="http://zigbee.org/sep" xmlns:xsi="http://www.w3.org/2001/
XMLSchema-instance" href="/sep2/dev/96/ps">
  <batteryStatus>4</batteryStatus>
  <changedTime>1487812095</changedTime>
  <currentPowerSource>1</currentPowerSource>
  <estimatedChargeRemaining>9300</estimatedChargeRemaining>
  <PEVInfo>
    <chargingPowerNow>
      <multiplier>3</multiplier>
      <value>-5</value>
    </chargingPowerNow>
    <energyRequestNow>
      <multiplier>3</multiplier>
      <value>22</value>
    </energyRequestNow>
    <maxForwardPower>
      <multiplier>3</multiplier>
      <value>7</value>
    </maxForwardPower>
    <minimumChargingDuration>11280</minimumChargingDuration>
    <targetStateOfCharge>10000</targetStateOfCharge>
  </PEVInfo>
</PowerStatus>
```

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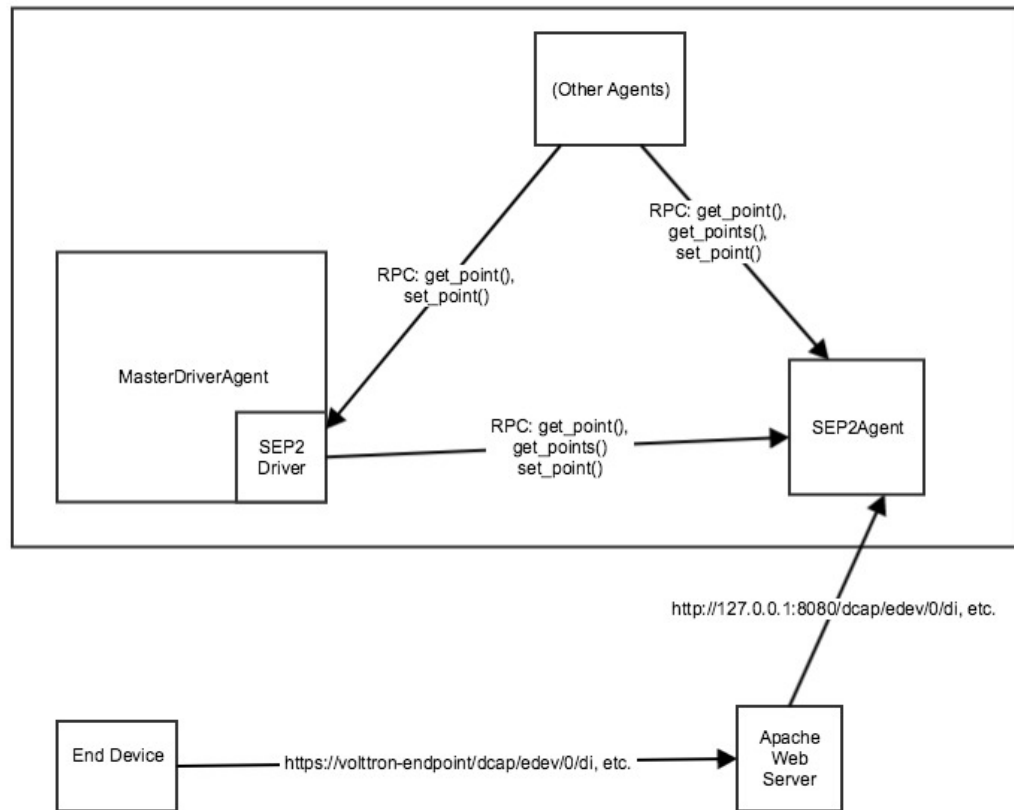
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```

<timeChargeIsNeeded>9223372036854775807</timeChargeIsNeeded>
<timeChargingStatusPEV>1487812095</timeChargingStatusPEV>
</PEVInfo>
</PowerStatus>

```

## Design Details



VOLTTRON's IEEE 2030.5 implementation includes a IEEE 2030.5 Agent and a IEEE 2030.5 device driver, as described below.

### VOLTTRON IEEE 2030.5 Device Driver

The IEEE 2030.5 device driver is a new addition to VOLTTRON Platform Driver Agent's family of standard device drivers. It exposes *get\_point/set\_point* calls for IEEE 2030.5 EndDevice fields.

The IEEE 2030.5 device driver periodically issues the IEEE 2030.5 Agent RPC calls to refresh its cached representation of EndDevice data. It issues RPC calls to the IEEE 2030.5 Agent as needed when responding to *get\_point*, *set\_point* and *scrape\_all* calls.

## Field Definitions

These field IDs correspond to the ones in the IEEE 2030.5 device driver's configuration file, *ieee2030\_5.csv*. They have been used in that file's *Volttron Point Name* column and also in its *Point Name* column.

Field ID	IEEE 2030.5 Resource/Property	Description	Units	Type
b1_Md	<b>device_information</b> mfModel	Model (32 char lim).		string
b1_Opt	<b>device_information</b> lfdi	Long-form device identifier (32 char lim).		string
b1_SN	<b>abstract_device</b> sfdi	Short-form device identifier (32 char lim).		string
b1_Vr	<b>device_information</b> mfHwVer	Version (16 char lim).		string
b113_A	<b>mirror_meter_reading</b> PhaseCurrentAvg	AC current.	A	float
b113_DCA	<b>mirror_meter_reading</b> InstantPackCurrent	DC current.	A	float
b113_DCV	<b>mirror_meter_reading</b> LineVoltageAvg	DC voltage.	V	float
b113_DCW	<b>mirror_meter_reading</b> PhasePowerAvg	DC power.	W	float
b113_PF	<b>mirror_meter_reading</b> PhasePFA	AC power factor.	%	float
b113_WH	<b>mirror_meter_reading</b> EnergyIMP	AC energy.	Wh	float
b120_AhrRtg	<b>der_capability</b> rtgAh	Usable capacity of the battery. Maximum charge minus minimum charge.	Ah	float
b120_ARtg	<b>der_capability</b> rtgA	Maximum RMS AC current level capability of the inverter.	A	float
b120_MaxChaRte	<b>der_capability</b> rtgMaxChargeRate	Maximum rate of energy transfer into the device.	W	float
b120_MaxDisChaRte	<b>der_capability</b> rtgMaxDischargeRate	Maximum rate of energy transfer out of the device.	W	float
b120_WHRtg	<b>der_capability</b> rtgWh	Nominal energy rating of the storage device.	Wh	float
<b>172</b>			<b>Chapter 2. Features</b>	
b120_WRtg	<b>der_capability</b> rtgW	Continuous power output capability of the inverter.	W	float

## Revising and Expanding the Field Definitions

The IEEE 2030.5-to-SunSpec field mappings in this implementation are a relatively thin subset of all possible field definitions. Developers are encouraged to expand the definitions.

The procedure for expanding the field mappings requires you to make changes in two places:

1. Update the driver's point definitions in *services/core/PlatformDriverAgent/platform\_driver/ieee2030\_5.csv*
2. Update the IEEE 2030.5-to-SunSpec field mappings in *services/core/IEEE2030\_5Agent/ieee2030\_5/end\_device.py* and *\_\_init\_\_.py*

When updating VOLTTRON's IEEE 2030.5 data model, please use field IDs that conform to the SunSpec block-number-and-field-name model outlined in the SunSpec Information Model Reference (see the link below).

## For Further Information

SunSpec References:

- Information model specification: <http://sunspec.org/wp-content/uploads/2015/06/SunSpec-Information-Models-12041.pdf>
- Information model reference spreadsheet: <http://sunspec.org/wp-content/uploads/2015/06/SunSpec-Information-Model-Reference.xlsx>
- Inverter models: <http://sunspec.org/wp-content/uploads/2015/06/SunSpec-Inverter-Models-12020.pdf>
- Energy storage models: <http://sunspec.org/wp-content/uploads/2015/06/SunSpec-Energy-Storage-Models-12032.pdf>

Questions? Please contact:

- Rob Calvert ([rob@kisensum.com](mailto:rob@kisensum.com)) or James Sheridan ([james@kisensum.com](mailto:james@kisensum.com))

## 2.10.7 Obix History Agent

The Obix History Agent captures data history data from an Obix RESTful interface and publishes it to the message bus like a driver for capture by agents and historians. The Agent will setup its queries to ensure that data is only publishes once. For points queried for the first time it will go back in time and publish old data as configured.

The data will be collated into device *all* publishes automatically and will use a timestamp in the header based on the timestamps reported by the Obix interface. The publishes will be made in chronological order.

Units data is automatically read from the device.

For sending commands to devices see *Obix Driver Configuration*.

## Agent Configuration

There are three arguments for the **driver\_config** section of the device configuration file:

- **url** - URL of the interface.
- **username** - User name for site..
- **password** - Password for username.
- **check\_interval** - How often to check for new data on each point.
- **path\_prefix** - Path prefix for all publishes.

- **register\_config** - Registry configuration file.
- **default\_last\_read** - Time, in hours, to go back and retrieve data for a point for the first time.

Here is an example device configuration file:

```
{
  "url": "http://example.com/obix/histories/EXAMPLE/",
  "username": "username",
  "password": "password",
  # Interval to query interface for updates in minutes.
  # History points are only published if new data is available
  # config points are gathered and published at this interval.
  "check_interval": 15,
  # Path prefix for all publishes
  "path_prefix": "devices/obix/history/",
  "register_config": "config://registry_config.csv",
  "default_last_read": 12
}
```

A sample Obix configuration file can be found in the VOLTTRON repository in `services/core/ObixHistoryPublish/config`

## Registry Configuration File

Similar to a driver the Obix History Agent requires a registry file to select the points to publish.

The registry configuration file is a **CSV** file. Each row configures a point on the device.

The following columns are required for each row:

- **Device Name** - Name of the device to associate with this point.
- **Volttron Point Name** - The VOLTTRON Point name to use when publishing this value.
- **Obix Name** - Name of the point on the Obix interface. Escaping of spaces and dashes for use with the interface is handled internally.

Any additional columns will be ignored. It is common practice to include a *Notes* or *Unit Details* for additional information about a point.

The following is an example of a Obix History Agent registry configuration file:

Table 6: Obix

Device Name	Volttron Point Name	Obix Name
device1	Local Outside Dry Bulb	Local Outside Dry Bulb
device2	CG-1 Gas Flow F-2	CG-1 Gas Flow F-2
device2	Cog Plant Gas Flow F-1	Cog Plant Gas Flow F-1
device2	Boiler Plant Hourly Gas Usage	Boiler Plant Hourly Gas Usage
device3	CG-1 Water Flow H-1	CG-1 Water Flow H-1

A sample Obix History Agent configuration can be found in the VOLTTRON repository in `services/core/ObixHistoryPublish/registry_config.csv`

## Automatic Obix Configuration File Creation

A script that will automatically create both a device and register configuration file for a site is located in the repository at `scripts/obix/get_obix_history_config.py`.

The utility is invoked with the command:

```
python get_obix_history_config.py <url> <registry_file> <driver_file> -u <username> -
  ↪p <password> -d <device name>
```

If either the `registry_file` or `driver_file` is omitted the script will output those files to stdout.

If either the username or password options are left out the script will ask for them on the command line before proceeding.

The device name option specifies a default device for every point in the configuration.

The registry file produced by this script assumes that the *Volttron Point Name* and the *Obix Name* have the same value. Also, it is assumed that all points should be read only. Users are expected to fix this as appropriate.

### 2.10.8 OpenADR 2.0b VEN Agent

OpenADR (Automated Demand Response) is a standard for alerting and responding to the need to adjust electric power consumption in response to fluctuations in grid demand.

OpenADR communications are conducted between Virtual Top Nodes (VTNs) and Virtual End Nodes (VENs). In this implementation, a VOLTRON agent, the VEN agent, acts as a VEN, communicating with its VTN by means of EIEvent and EIReport services in conformance with a subset of the OpenADR 2.0b specification. This document's VEN Agent VOLTRON Interface section defines how the VEN agent relays information to, and receives data from, other VOLTRON agents.

The [OpenADR 2.0b specification](#) is available from the OpenADR Alliance. This implementation also generally follows the DR program characteristics of the Capacity Program described in Section 9.2 of the [OpenADR Program Guide](#).

## DR Capacity Bidding and Events

The OpenADR Capacity Bidding program relies on a pre-committed agreement about the VEN's load shed capacity. This agreement is reached in a bidding process transacted outside of the OpenADR interaction, typically with a long-term scope, perhaps a month or longer. The VTN can "call an event," indicating that a load-shed event should occur in conformance with this agreement. The VTN indicates the level of load shedding desired, when the event should occur, and for how long. The VEN responds with an *optIn* acknowledgment. It can also *optOut*, but since it has been pre-committed, an *optOut* may incur penalties.

## Reporting

The VEN agent reports device status and usage telemetry to the VTN, relying on information received periodically from other VOLTRON agents.

## General Approach

Events:

- The VEN agent maintains a persistent record of DR events.
- Event updates (including creation) trigger publication of event JSON on the VOLTTRON message bus.

Reporting:

- The VEN agent configuration defines telemetry values (data points) that can be reported to the VTN.
- Other VOLTTRON agents are expected to call `add_report_capability()` to supply the VEN agent with a regular stream of telemetry values for reporting.
- Other VOLTTRON agents can receive notification of changes in telemetry reporting requirements by subscribing to publication of telemetry parameters.

## VEN Agent VOLTTRON Interface

The VEN agent implements the following VOLTTRON PubSub and RPC calls.

PubSub: event update

```
def publish_event(self, event: Event) -> None:
    """
        Publish an event to the Volttron message bus. When an event is created/updated,
        ↪ it is published to the VOLTTRON bus with a topic that includes 'openadr/event_update
        ↪ '.

        :param event: The Event received from the VTN
    """
```

RPC calls:

```
@RPC.export
def add_report_capability(
    self,
    callback: Callable,
    report_name: REPORT_NAME,
    resource_id: str,
    measurement: MEASUREMENTS,
) -> tuple:
    """
        Add a new reporting capability to the client.

        This method is remotely accessible by other agents through Volttron's feature_
        ↪ Remote Procedure Call (RPC);
        for reference on RPC, see https://volttron.readthedocs.io/en/develop/platform-features/message-bus/vip/vip-json-rpc.html?highlight=remote%20procedure%20call

        :param callback: A callback or coroutine that will fetch the value for a specific_
        ↪ report. This callback will be passed the report_id and the r_id of the requested_
        ↪ value.
        :param report_name: An OpenADR name for this report
        :param resource_id: A specific name for this resource within this report.
        :param measurement: The quantity that is being measured
    """
```

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```

:~return: Returns a tuple consisting of a report_specifier_id (str) and an r_id_
↪(str) an identifier for OpenADR messages
"""

```

## PubSub: Event Update

When an event is created/updated, the event is published with a topic that includes *openadr/event/{ven\_name}*.

Event JSON structure:

```

{
  'active_period': {
    'dtstart': DateTime - UTC,
    'duration': TimeDelta - seconds,
    'notification': TimeDelta - seconds,
    'ramp_up': TimeDelta - seconds,
    'recovery': TimeDelta - seconds,
    'tolerance': {
      'tolerate': {
        'startafter': TimeDelta - seconds
      }
    }
  },
  'event_descriptor': {
    'created_date_time': DateTime - UTC,
    'event_id': String,
    'event_status': String,
    'market_context': String,
    'modification_date_time': DateTime - UTC,
    'modification_number': Integer,
    'modification_reason': Any,
    'priority': Integer,
    'test_event': Boolean,
    'vtn_comment': Any
  },
  'event_signals': [
    {
      'current_value': Double,
      'intervals': [
        {
          'duration': TimeDelta - seconds,
          'signal_payload': Double,
          'uid': Integer
        }
      ],
      'signal_id': String,
      'signal_name': String,
      'signal_type': String
    }
  ],
  'response_required': String,
  'targets': [
    {
      'ven_id': String
    }
  ],
  'targets_by_type': {
    'ven_id': [String]
  }
}

```

## OpenADR VEN Agent: Installation and Configuration

The VEN agent can be configured, built and launched using the VOLTTRON agent installation process described in <https://volttron.readthedocs.io/en/releases-8.2/developing-volttron/developing-agents/agent-development.html#packaging-and-installation>.

The VEN agent depends on some third-party libraries that are not in the standard VOLTTRON installation. They should be installed in the VOLTTRON virtual environment prior to building the agent:

```

(volttron) $ cd $VOLTTRON_ROOT/services/core/OpenADRVenAgent
(volttron) $ pip install -r requirements.txt

```

where *\$VOLTTRON\_ROOT* is the base directory of the cloned VOLTTRON code repository.

The VEN agent is designed to work in tandem with a “control agent,” another VOLTTRON agent that uses VOLTTRON RPC calls to manage events and supply report data.

## Configuration Parameters

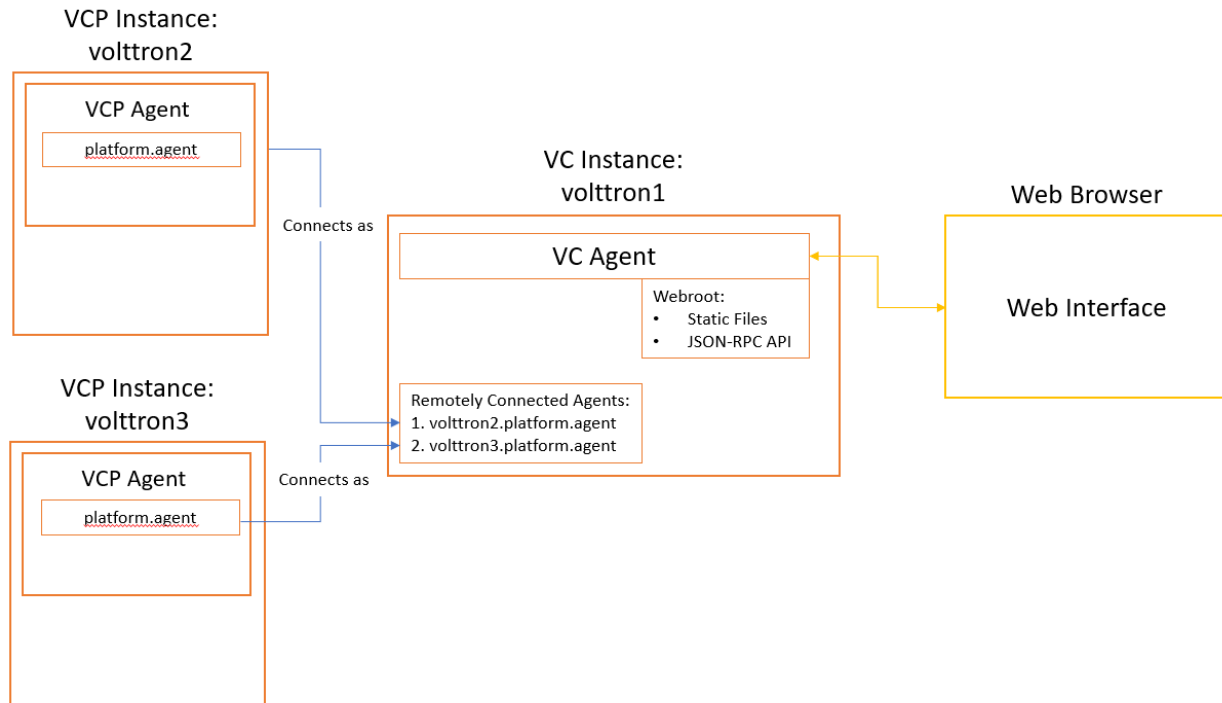
The VEN agent's configuration file contains JSON that includes several parameters for configuring VTN server communications and other behavior. A sample configuration file, *config\_example1.json*, has been provided in the agent directory.

The VEN agent supports the following configuration parameters. Note: Some configurations will be noted as required; otherwise, they are optional:

Parameter	Example	Description
ven_name	“ven01”	(Required) Name of this virtual end node. This name is used during automated registration only, identifying the VEN before its VEN ID is known.
vtn_url	“http://openadr-vtn.ki-evi.com:8000”	(Required) URL and port number of the VTN.
debug	true	Whether or not to print debugging messages
cert	“/path/to/my/cert”	The path to a PEM-formatted Certificate file to use for signing messages.
key	“/path/to/my/private-key”	The path to a PEM-formatted Private Key file to use for signing messages.
passphrase	“somepassword12345”	The passphrase for the Private Key
vtn_fingerprint	“ffdfdfdfdfdfgsge”	The fingerprint for the VTN’s certificate to verify incoming messages
show_fingerprint	false	Whether to print your own fingerprint on startup. Defaults to True.
ca_file	“/path/to/my/ca-file”	The path to the PEM-formatted CA file for validating the VTN server’s certificate.
ven_id	“someid”	The ID for this VEN. If you leave this blank, a VEN_ID will be assigned by the VTN.
disable_signature	true	Whether or not to sign outgoing messages using a public-private key pair in PEM format.

### 2.10.9 VOLTRON Central Management Overview

VOLTTRON Central is responsible for controlling multiple VOLTTRON instances with a single management instance. The managed VOLTTRON instances can be either local or remote. Each managed instance will have a VOLTTRON Central Platform agent installed and running to interface with the primary VOLTTRON Central agent.



There is a [VOLTTTRON Central Deployment Demo](#) that will allow you to quickly setup and see the current offerings of the interface.

VOLTTTRON Central will allow you to:

- See a list of platforms being managed.
- Add and remove platforms.
- Install, start and stop agents on the managed platforms.
- Create dynamic graphs from the historians based upon data points.
- Execute functions on remote platforms.

## Volttron Central Agent

The VOLTTTRON Central (VC) agent serves a web-based management UI that interfaces with the VOLTTTRON Central web API.

## VOLTTTRON Central Platform Agent

The VOLTTTRON Central Platform (VCP) Agent allows communication with a VOLTTTRON Central instance. Each VOLTTTRON instance managed by VOLTTTRON Central should have only one Platform Agent. The Platform Agent must have the *VIP Identity* of `platform.agent` which is specified as default by VOLTTTRON *known identities*.

## Additional VOLTTRON Central Resources

### VOLTTRON Central (VC)

The VC Agent is responsible for controlling multiple VOLTTRON instances through a single web interface. The VOLTTRON instances can be either local or remote. VC leverages an internal VOLTTRON web server providing a interface to our JSON-RPC based web API. Both the web api and the interface are served through the VC agent.

### Instance Configuration

In order for any web agent to be enabled, there must be a port configured to serve the content. The easiest way to do this is to create a config file in the root of your *VOLTTRON\_HOME* directory (to do this automatically see *VOLTTRON Config*.)

The following is an example of the configuration file

```
[volttron]
instance-name = volttron1
message-bus = rmq
vip-address = tcp://127.0.0.1:22916
bind-web-address = https://localhost:8443
volttron-central-address = https://localhost:8443
```

---

**Note:** The above configuration will open a discoverable port for the volttron instance. In addition, the opening of this web address allows you to serve both static as well as dynamic pages.

---

Verify that the instance is serving properly by pointing your web browser to `https://localhost:8443/index.html`

### Agent Execution

To setup an instance of VC, it is recommended to follow one of the following guides depending on your use case. For a single instance, please consult the *VOLTTRON Central Demo*. For controlling multiple instances with different message busses, consider the *VOLTTRON Central Multi-Platform Multi-Bus Demo*.

However, if you already have an instance of VOLTTRON configured that you wish to make an instance of VOLTTRON Central, you may install and start it as follows:

```
# Arguments are package to execute, config file to use, tag to use as reference
./scripts/core/pack_install.sh services/core/VolttronCentral services/core/
↳ VolttronCentral/config vc

# Start the agent
vctl start --tag vc
```

## Security Considerations

When deploying any web agent, including VOLTTRON Central, it is important to consider security. Please refer to the documentation for *Security Considerations of Deployment*. In particular, it would be recommended to consider the use of a reverse proxy for a VOLTTRON Central deployment.

## Volttron Central Platform (VCP)

The VCP agent exposes a VOLTTRON instance to a Volttron Central (VC) agent. The VC agent can either be on the same or a remote VOLTTRON instance. The VCP agent will, once authenticated with the VC agent's instance, auto connect to the VC agent's instance and register itself on startup. The VCP instance will attempt to reconnect to the VC agent's instance if connection is disrupted. VCP has many configuration options available that can be set via the configuration store. An example config is provided below with information on these options.

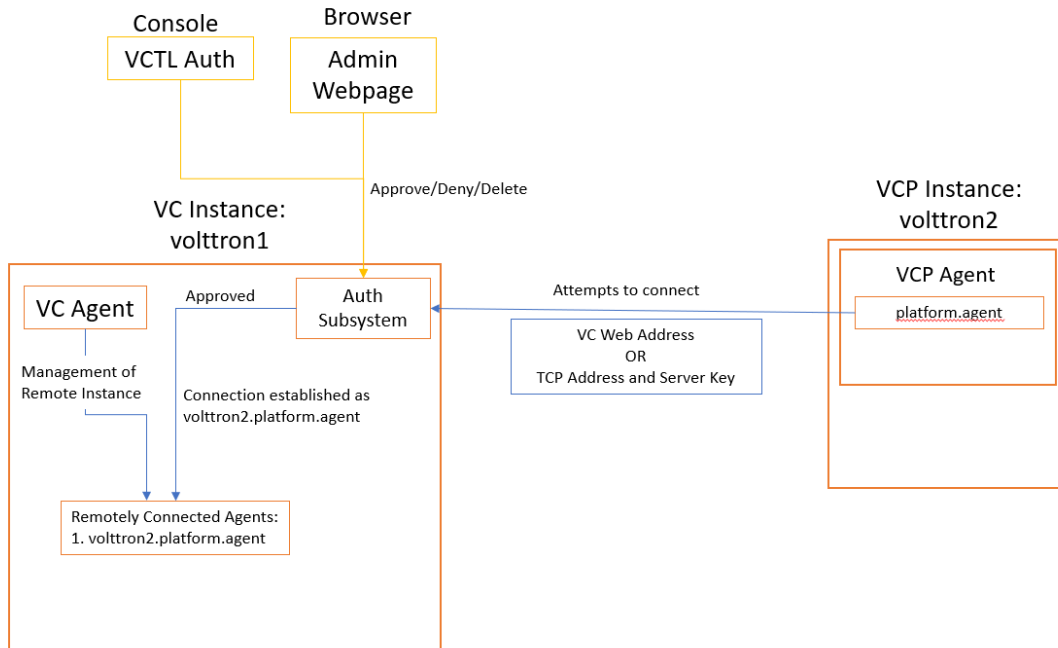
## Publish Specifications

During connection to the VC agent's instance the instance-name from the VCP will be used to connect to the VC agent's instance. It will have the form vcp-instance name with all invalid characters replaced with an underscore. See `volttron.platform.agent.util.normalize_identity()` for how the instance name is normalized into a identity.

## FAQ / Notes

- VCP agent has an identity of 'platform.agent'. This cannot be changed.
- There may only be a single agent connected to a VOLTTRON instance with the identity of 'platform.agent'
- From VC's perspective, the VCP agent's identity is <VCP Instance Name>.platform.agent
- VCP will publish to the remote platform under the topic `platforms/vcp-(normalized instance name)/`
- VC subscribes to `platforms/*` and gets status of the remote instance.
- VCP connects to the remote instance using the auth subsystem. Once is connected to the remote instance, VCP's rpc functions are available for the remote VC to call.
- VC looks at the peers connected to the instance in order to determine what remote instances are connected to the platform (*.platform.agent are assumed to be VCP instances*).

## Connect VCP to VC



## Configuration Options

The following JSON configuration file shows all the options currently supported by the VCP agent. By default an empty config file is used.

```
{
  # The volttron-central-address, volttron-central-serverkey and
  # instance-name may be set in the VCP instance configuration file or
  # or as command line parameters to the VOLTTRON instance.
  #
  # The volttron-central-address is either an http address or a tcp
  # address. If it is an http address vc must be running at the resolution
  # of http://ip:port/discovery/. VCP will use the tcp address and
  # serverkey in the response payload to connect to the VC agent instance.
  #
  # If the specified address is a tcp address then the configuration
  # must also contain a volttron-central-serverkey.
  "volttron-central-address": "http://ip<host>:port" or "tcp://ip:port",

  # The serverkey of the VC agent's instance.
  "volttron-central-serverkey": "VC agent's instance serverkey",

  # interval at which VCP will attempt to connect to the VC agent's
  # instance when a disconnection occurs.
  "volttron-central-reconnect-interval": 5,

  # The name of instance to be sent to volttron central for displaying
  # on the interface.
  "instance-name": "name of instances (VC agent's instance ip address as default)",
}
```

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```
# VCP will publish health statistics of the instance at a specified
# interval.
"stats-publish-interval": 30,

# The VCP provides a topic/replace mapping for the platform. It is
# available via rpc function so that sensitive information won't be
# published through forwarding.
#
# The topic-replace-map is used to search/replace all of the topics
# published from ForwardHistorians and other agents that connect with
# external instances.
"topic-replace-map": {
    "from": "to",
    "from1": "to1"
}
}
```

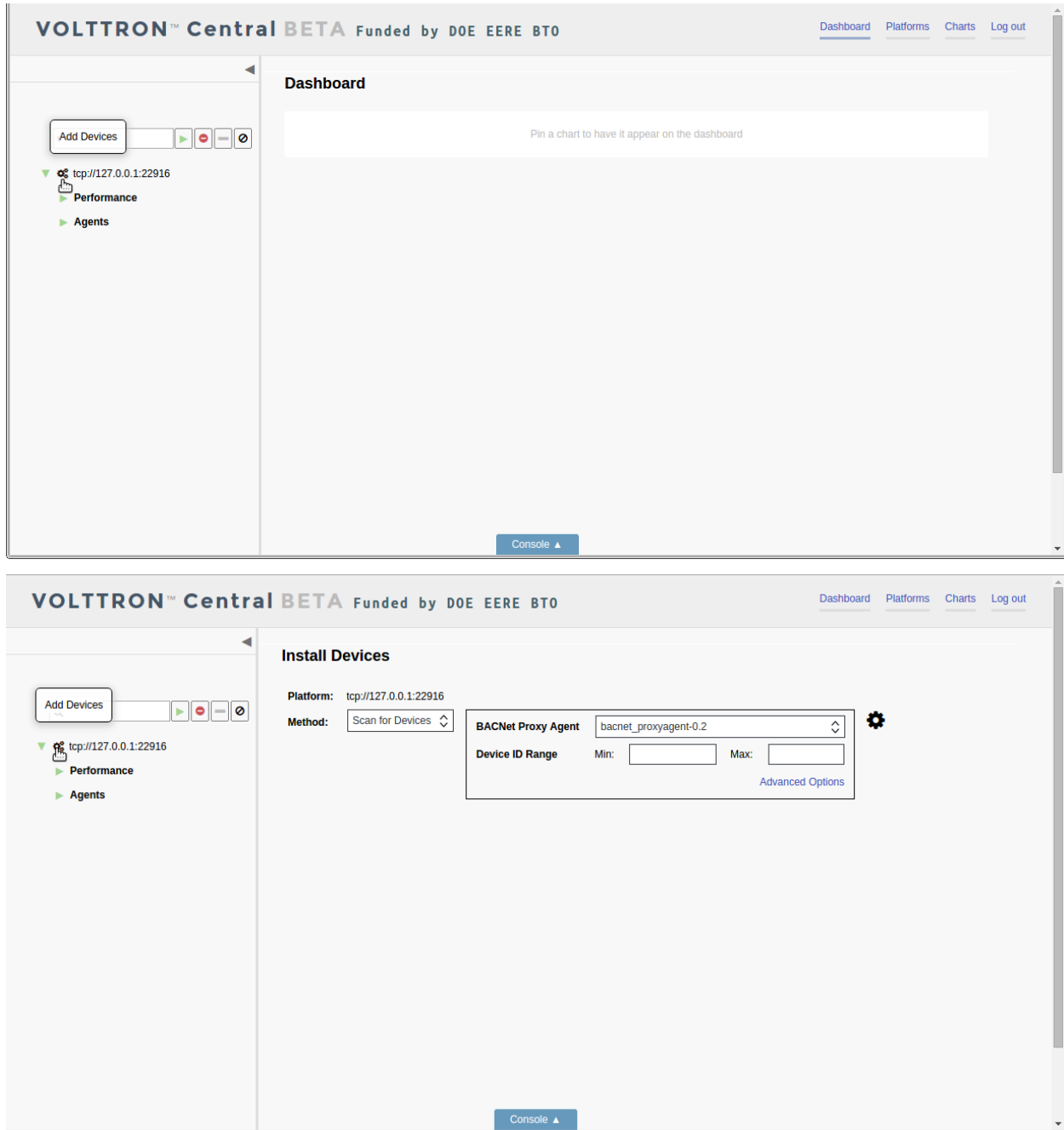
## Device Configuration in VOLTRON Central

Devices in your network can be detected and configured through the VOLTRON Central UI. The current version of VOLTRON enables device detection and configuration for BACnet devices. The following sections describe the processes involved with performing scans to detect physical devices and get their points, and configuring them as virtual devices installed on VOLTRON instances.

- *Launching Device Configuration*
- *Scanning for Devices*
- *Scanning for Points*
- *Registry Configuration File*
- *Additional Attributes*
- *Quick Edit Features*
- *Keyboard Commands*
- *Registry Preview*
- *Registry Configuration Options*
- *Reloading Device Points*
- *Device Configuration Form*
- *Configuring Sub-devices*
- *Reconfiguring Devices*
- *Exporting Registry Configuration Files*

## Launching Device Configuration

To begin device configuration in VOLTTRON Central, extend the side panel on the left and find the cogs button next to the platform instance you want to add a device to. Click the cogs button to launch the device configuration feature.



Currently the only method of adding devices is to conduct a scan to detect BACnet devices. A BACnet Proxy Agent must be running in order to do the scan. If more than one BACnet Proxy is installed on the platform, choose the one that will be used for the scan.

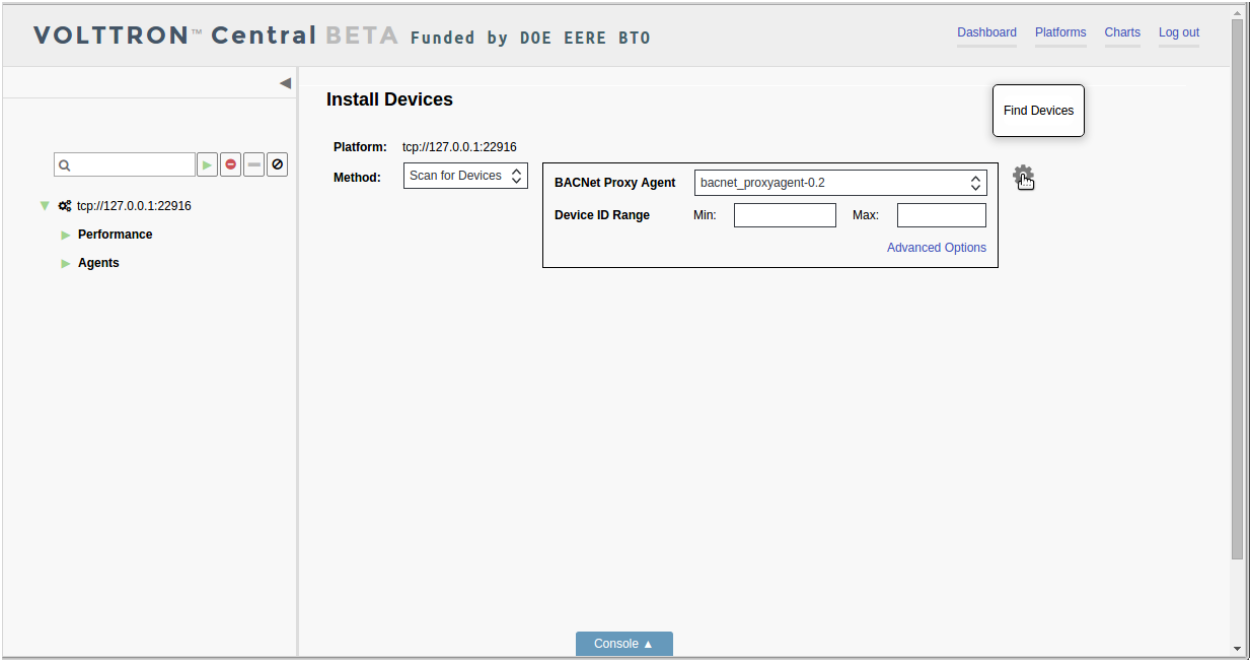
The scan can be conducted using default settings that will search for all physical devices on the network. However, optional settings can be used to focus on specific devices or change the duration of the scan. Entering a range of device IDs will limit the scan to return only devices with IDs in that range. Advanced options include the ability to specify



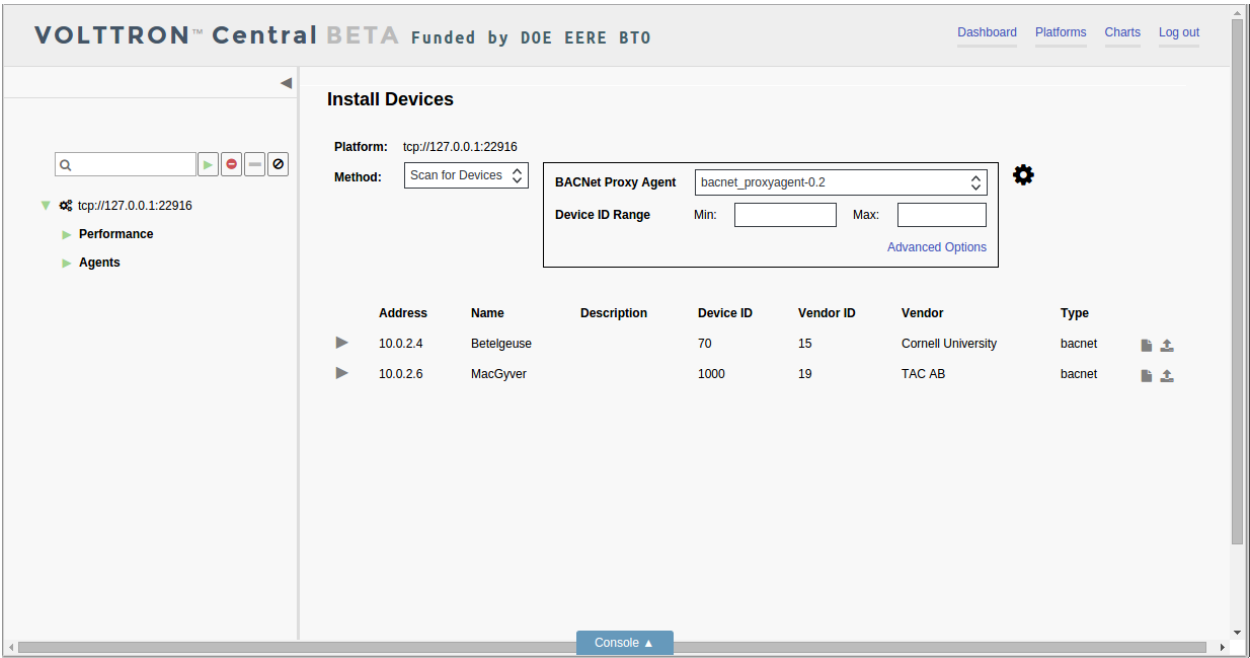
the IP address of a device to detect as well as the ability to change the duration of the scan from the default of five seconds.

Scanning for Devices

To start the scan, click the large cog button to the right of the scan settings.

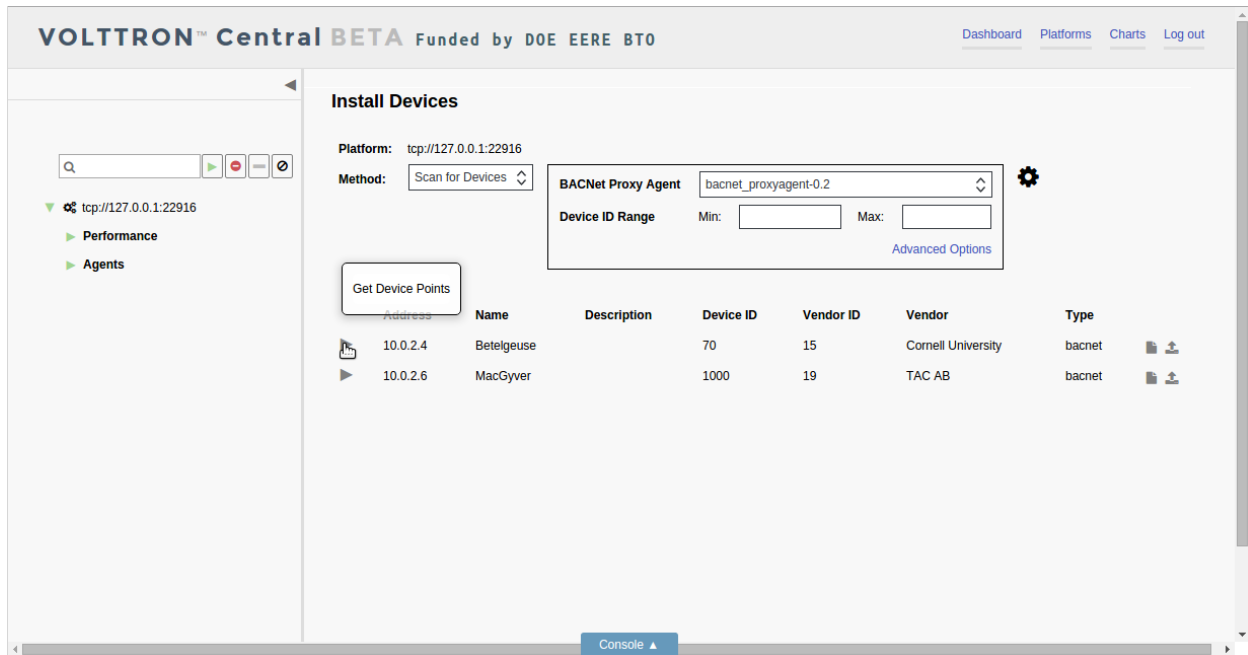


Devices that are detected will appear in the space below the scan settings. Scanning can be repeated at any time by clicking the large cog button again.



## Scanning for Points

Another scan can be performed on each physical device to retrieve its available points. This scan is initiated by clicking the triangle next to the device in the list. The first time the arrow is clicked, it initiates the scan. After the points are retrieved, the arrow becomes a hide-and-show toggle button and won't re-initiate scanning the device.



After the points have been retrieved once, the only way to scan the same device for points again is to relaunch the device configuration process from the start by clicking on the small cogs button next to the platform instance in the panel tree.

## Registry Configuration File

The registry configuration determines which points on the physical device will be associated with the virtual device that uses that particular registry configuration. The registry configuration determines which points' data will be published to the message bus and recorded by the historian, and it determines how the data will be presented.

When all the points on the device have been retrieved, the points are loaded into the registry configuration editor. There, the points can be modified and selected to go into the registry configuration file for a device.

Each row in the registry configuration editor represents a point, and each cell in the row represents an attribute of the point.

Only points that have been selected will be included in the registry configuration file. To select a point, check the box next to the point in the editor.

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tcp://127.0.0.1:22916

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent

bacnet\_proxyagent-0.2

Device ID Range

Min:

Max:

Advanced Options

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

Volttron Point Name

Writable

Units

ReturnAirTemperature

FALSE

UNKNOWN UNITS

ReturnAirHumidity

FALSE

UNKNOWN UNITS

CoolingValveOutputCommand

FALSE

UNKNOWN UNITS

MixedAirTemperature

FALSE

UNKNOWN UNITS

OutdoorAirHumidity

FALSE

UNKNOWN UNITS

PreheatTemperature

FALSE

UNKNOWN UNITS

DischargeAirTemperature

FALSE

UNKNOWN UNITS

DischargeAirStaticPressure

FALSE

UNKNOWN UNITS

Console

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tcp://127.0.0.1:22916

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent

bacnet\_proxyagent-0.2

Device ID Range

Min:

Max:

Advanced Options

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

Volttron Point Name

Writable

Units

ReturnAirTemperature

FALSE

UNKNOWN UNITS

ReturnAirHumidity

FALSE

UNKNOWN UNITS

CoolingValveOutputCommand

FALSE

UNKNOWN UNITS

MixedAirTemperature

FALSE

UNKNOWN UNITS

OutdoorAirHumidity

FALSE

UNKNOWN UNITS

PreheatTemperature

FALSE

UNKNOWN UNITS

DischargeAirTemperature

FALSE

UNKNOWN UNITS

DischargeAirStaticPressure

FALSE

UNKNOWN UNITS

Console

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**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: Max:

[Advanced Options](#)

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

**Volttron Point Name** **Writable** **Units**

<input type="checkbox"/>	ReturnAirTemperature	FALSE	UNKNOWN UNITS	...
<input checked="" type="checkbox"/>	ReturnAirHumidity	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	CoolingValveOutputCommand	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	MixedAirTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	OutdoorAirHumidity	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	PreheatTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	DischargeAirTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	DischargeAirStaticPressure	FALSE	UNKNOWN UNITS	...

[Console](#)

Type directly in a cell to change an attribute value for a point.

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**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: Max:

[Advanced Options](#)

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

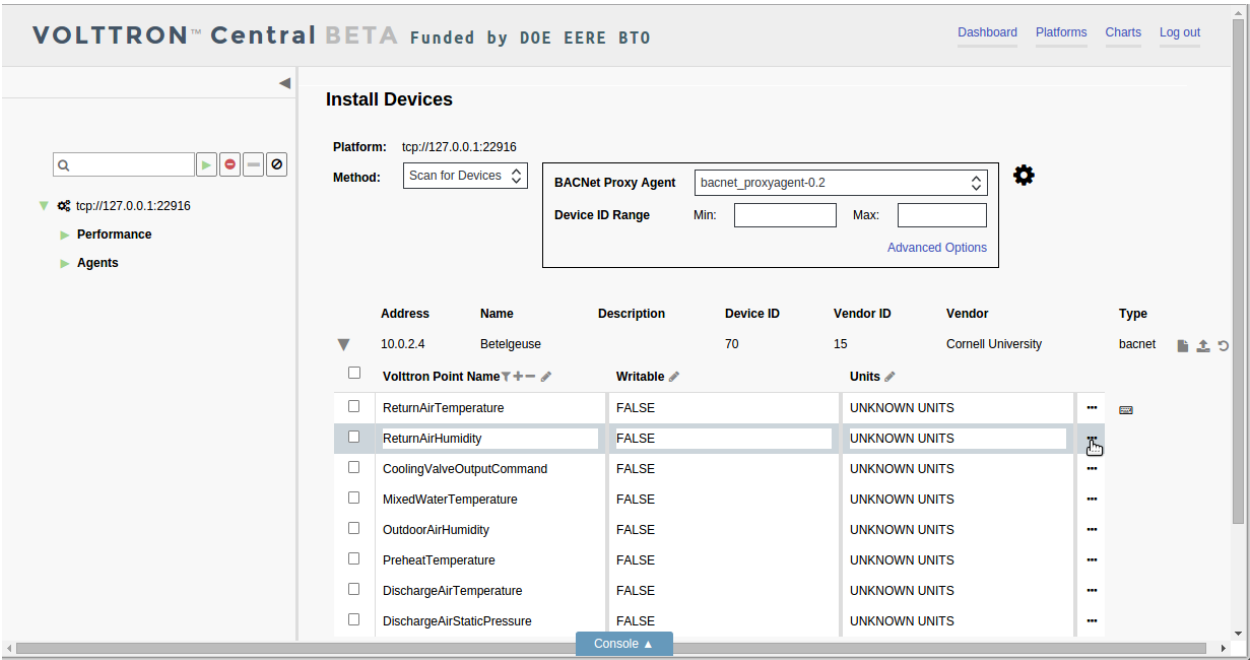
**Volttron Point Name** **Writable** **Units**

<input type="checkbox"/>	ReturnAirTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	ReturnAirHumidity	FALSE	UNKNOWN UNITS	...
<input checked="" type="checkbox"/>	CoolingValveOutputCommand	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	MixedAirTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	OutdoorAirHumidity	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	PreheatTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	DischargeAirTemperature	FALSE	UNKNOWN UNITS	...
<input type="checkbox"/>	DischargeAirStaticPressure	FALSE	UNKNOWN UNITS	...

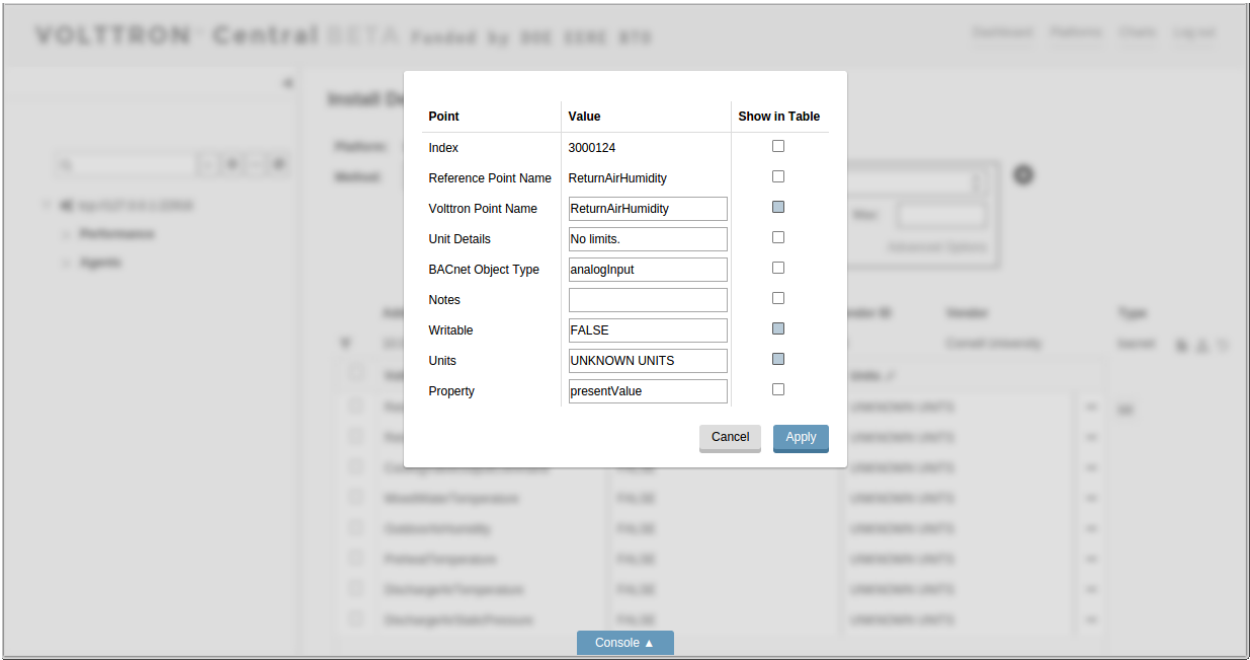
[Console](#)

Additional Attributes

The editor’s default view shows the attributes that are most likely to be changed during configuration: the VOLTRON point name, the writable setting, and the units. Other attributes are present but not shown in the default view. To see the entire set of attributes for a point, click the *Edit Point* button (the three dots) at the end of the point row.



In the window that opens, point attributes can be changed by typing in the fields and clicking the Apply button.

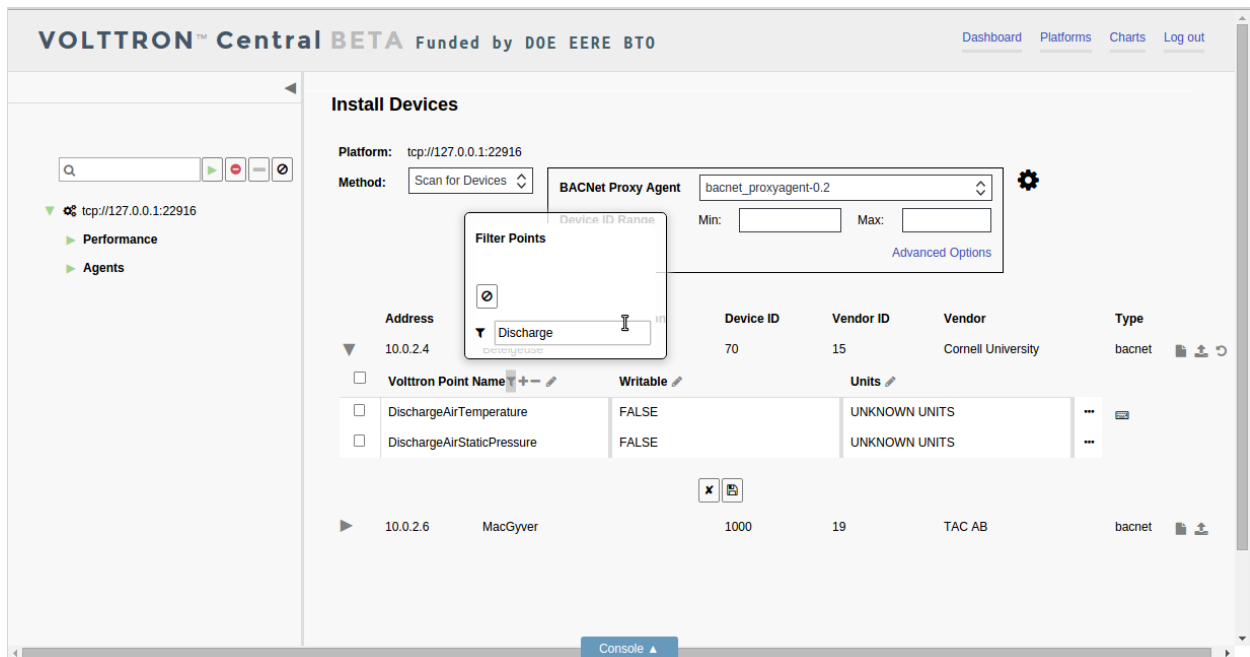
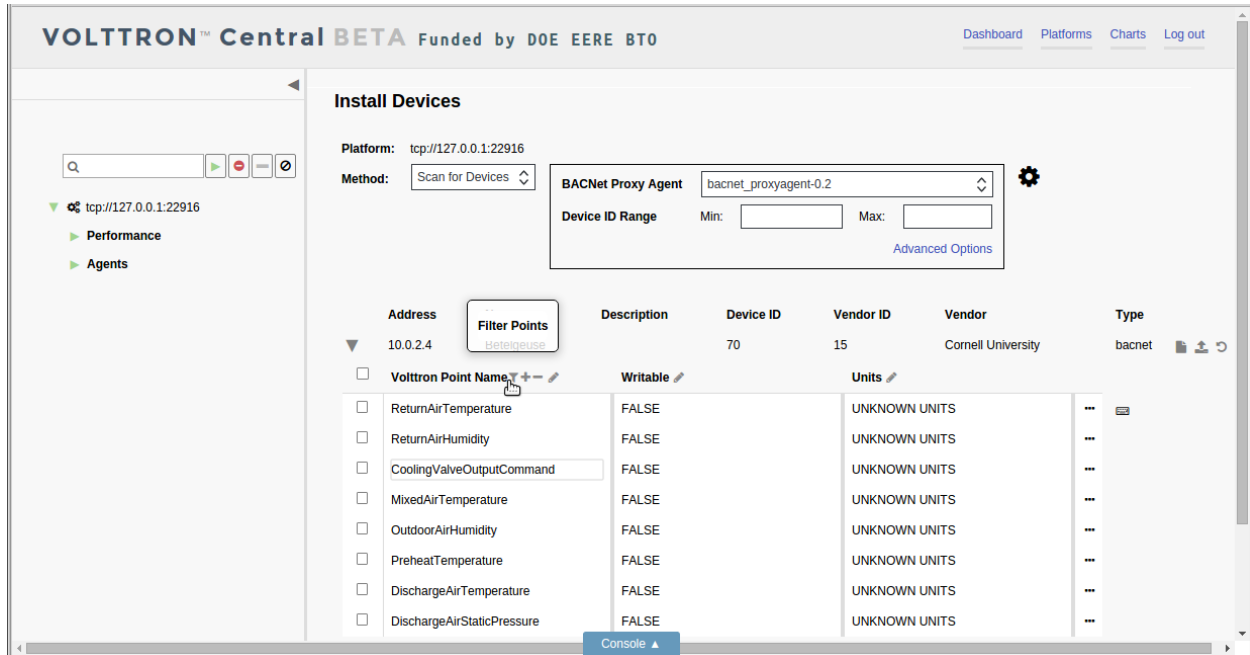


Checking or unchecking the *Show in Table* box for an attribute will add or remove it as a column in the registry configuration editor.

## Quick Edit Features

Several quick-edit features are available in the registry configuration editor.

The list of points can be filtered based on values in the first column by clicking the filter button in the first column's header and entering a filter term.



The filter feature allows points to be edited, selected, or deselected more quickly by narrowing down potentially large lists of points. However, the filter doesn't select points, and if the registry configuration is saved while a filter is applied, any selected points not included in the filter will still be included in the registry file.

To clear the filter, click on the *Clear Filter* button in the filter popup.

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**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: Max:

Filter Points: Clear Filter

Address	Device ID	Vendor ID	Vendor	Type
10.0.2.4	70	15	Cornell University	bacnet

Volttron Point Name	Writable	Units
ReturnAirTemperature	FALSE	UNKNOWN UNITS
ReturnAirHumidity	FALSE	UNKNOWN UNITS
CoolingValveOutputCommand	FALSE	UNKNOWN UNITS
MixedAirTemperature	FALSE	UNKNOWN UNITS
OutdoorAirHumidity	FALSE	UNKNOWN UNITS
PreheatTemperature	FALSE	UNKNOWN UNITS
DischargeAirTemperature	FALSE	UNKNOWN UNITS
DischargeAirStaticPressure	FALSE	UNKNOWN UNITS

Console

To add a new point to the points listed in the registry configuration editor, click on the *Add Point* button in the header of the first column.

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Dashboard Platforms Charts Log out

**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

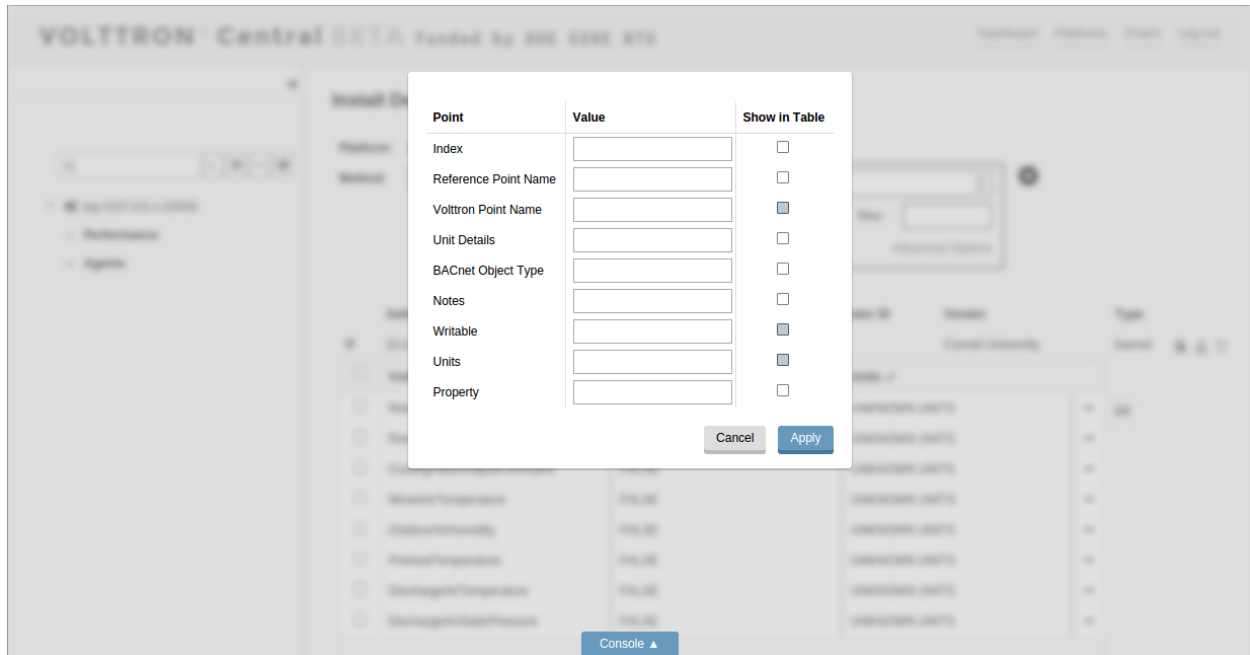
Device ID Range: Min: Max:

Add New Point

Address	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4		70	15	Cornell University	bacnet

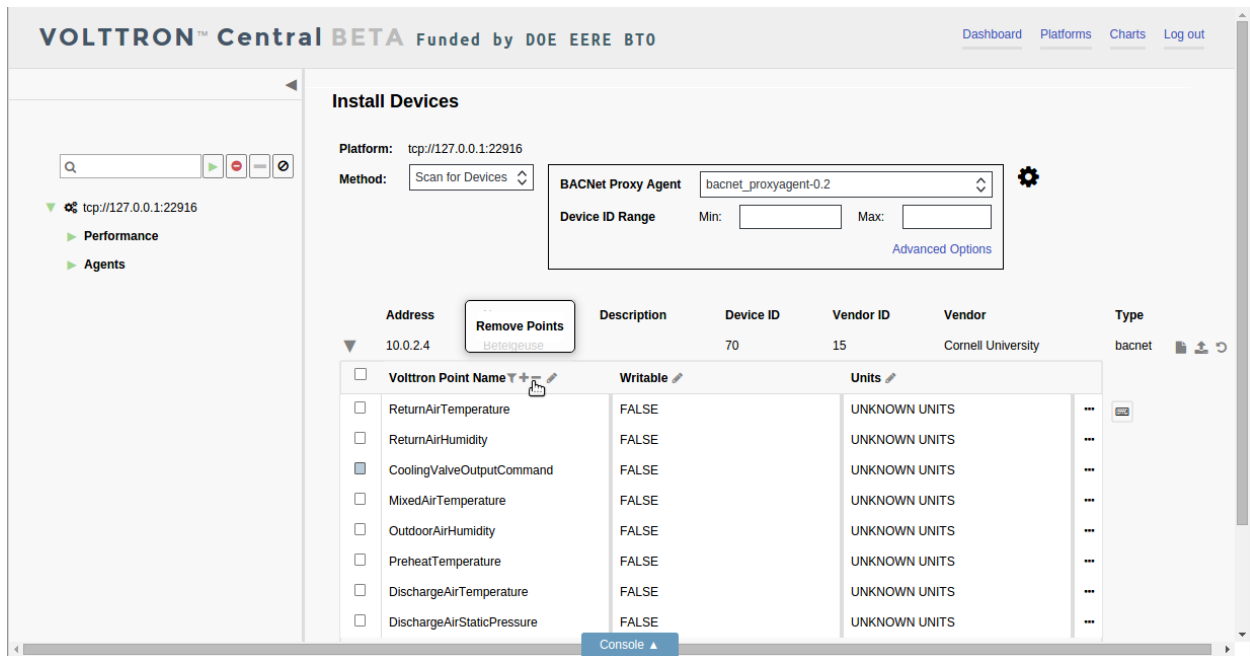
Volttron Point Name	Writable	Units
ReturnAirTemperature	FALSE	UNKNOWN UNITS
ReturnAirHumidity	FALSE	UNKNOWN UNITS
CoolingValveOutputCommand	FALSE	UNKNOWN UNITS
MixedAirTemperature	FALSE	UNKNOWN UNITS
OutdoorAirHumidity	FALSE	UNKNOWN UNITS
PreheatTemperature	FALSE	UNKNOWN UNITS
DischargeAirTemperature	FALSE	UNKNOWN UNITS
DischargeAirStaticPressure	FALSE	UNKNOWN UNITS

Console

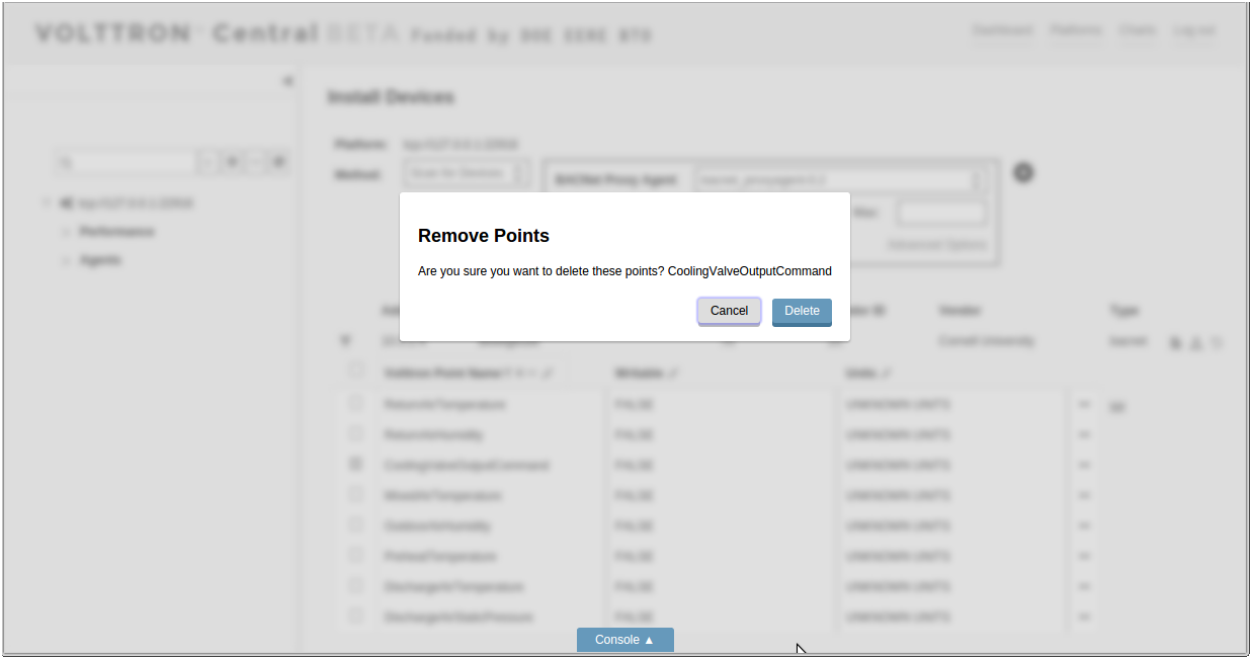


Provide attribute values, and click the *Apply* button to add the new point, which will be appended to the bottom of the list.

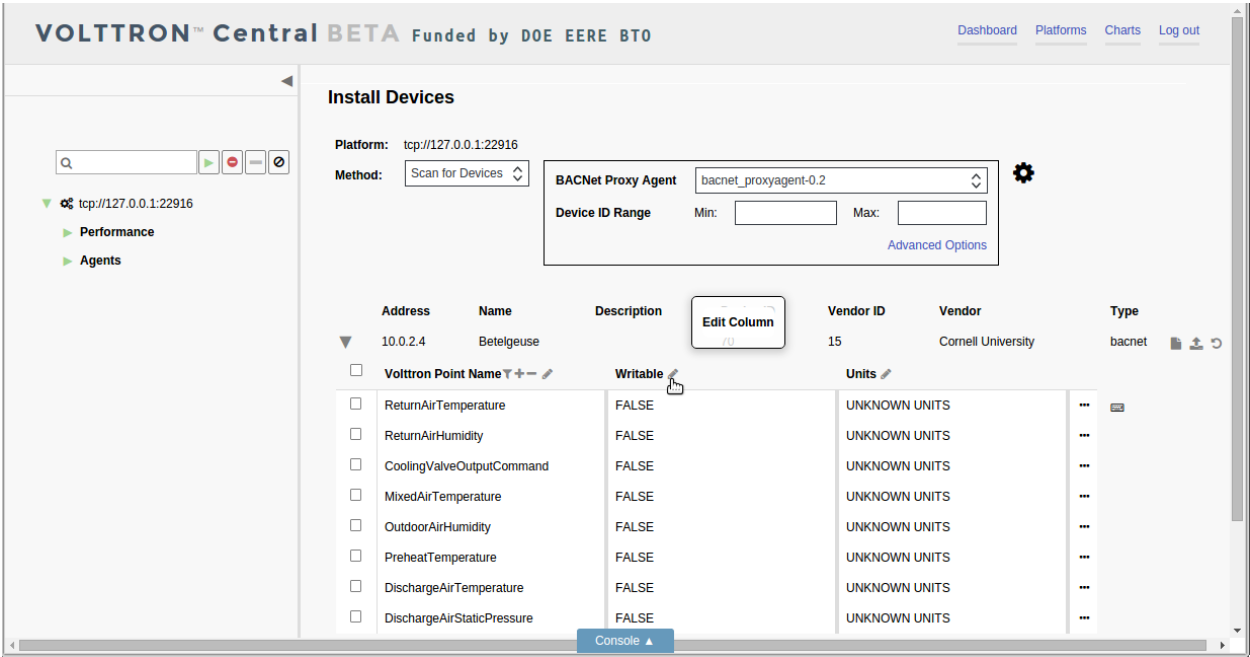
To remove points from the list, select the points and click the *Remove Points* button in the header of the first column.







Each column has an *Edit Column* button in its header.



Click on the button to display a popup menu of operations to perform on the column. The options include inserting a blank new column, duplicating an existing column, removing a column, or searching for a value within a column.

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Dashboard Platforms Charts Log out

Install Devices

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: Max:

Advanced Options

Address	Name	Description	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse	Description	15	Cornell University	bacnet

Find and Replace  
Duplicate  
Add  
Remove

Volttron Point Name Writable Units

Volttron Point Name	Writable	Units
ReturnAirTemperature	FALSE	UNKNOWN UNITS
ReturnAirHumidity	FALSE	UNKNOWN UNITS
CoolingValveOutputCommand	FALSE	UNKNOWN UNITS
MixedAirTemperature	FALSE	UNKNOWN UNITS
OutdoorAirHumidity	FALSE	UNKNOWN UNITS
PreheatTemperature	FALSE	UNKNOWN UNITS
DischargeAirTemperature	FALSE	UNKNOWN UNITS
DischargeAirStaticPressure	FALSE	UNKNOWN UNITS

Console

A duplicate or new column has to be given a unique name.

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Dashboard Platforms Charts Log out

Install Devices

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: Max:

Advanced Options

Address	Name	Description	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse	Description	15	Cornell University	bacnet

Find and Replace  
Duplicate  
Add  
Remove

Volttron Point Name Writable Units

Volttron Point Name	Writable	Units
ReturnAirTemperature	FALSE	UNKNOWN UNITS
ReturnAirHumidity	FALSE	UNKNOWN UNITS
CoolingValveOutputCommand	FALSE	UNKNOWN UNITS
MixedAirTemperature	FALSE	UNKNOWN UNITS
OutdoorAirHumidity	FALSE	UNKNOWN UNITS
PreheatTemperature	FALSE	UNKNOWN UNITS
DischargeAirTemperature	FALSE	UNKNOWN UNITS
DischargeAirStaticPressure	FALSE	UNKNOWN UNITS

Console

New Column

Column Name: Readable

Cancel Add Column

**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: , Max:

Advanced Options

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

Console

To search for values in a column, choose the *Find and Replace* option in the popup menu.

**VOLTRON™ Central BETA** Funded by DOE EERE BTO

Dashboard Platforms Charts Log out

**Install Devices**

Platform: tcp://127.0.0.1:22916

Method: Scan for Devices

BACNet Proxy Agent: bacnet\_proxyagent-0.2

Device ID Range: Min: , Max:

Advanced Options

Address	Name	Description	Device ID	Vendor ID	Vendor	Type
10.0.2.4	Betelgeuse		70	15	Cornell University	bacnet

Find and Replace

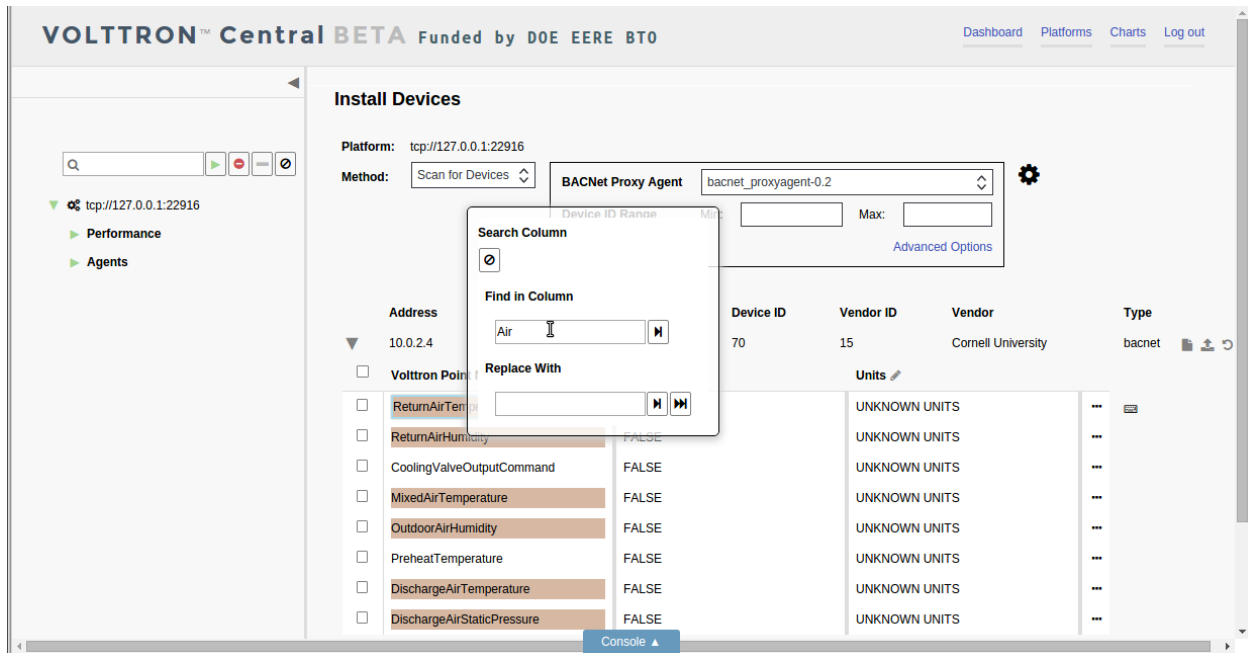
Duplicate

Add

Remove

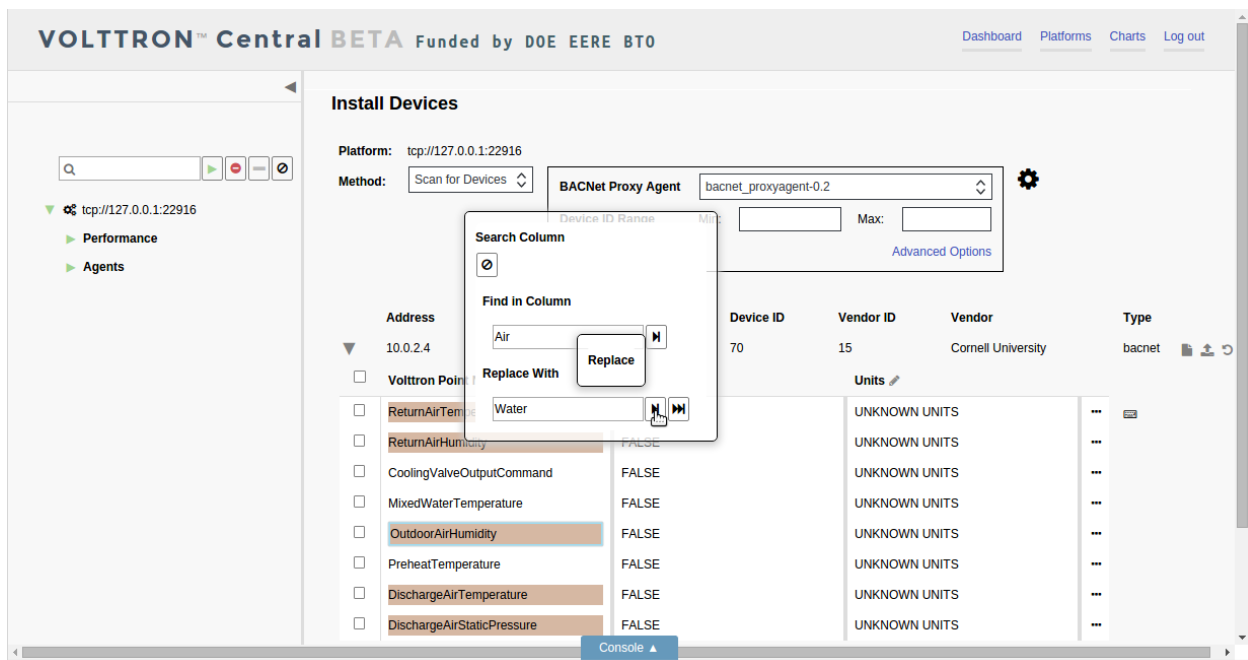
Console

Type the term to search for, and click the *Find Next* button to highlight all the matched fields in the column.



Click the *Find Next* button again to advance the focus down the list of matched terms.

To quickly replace the matched term in the cell with focus, type a replacement term, and click on the *Replace* button.

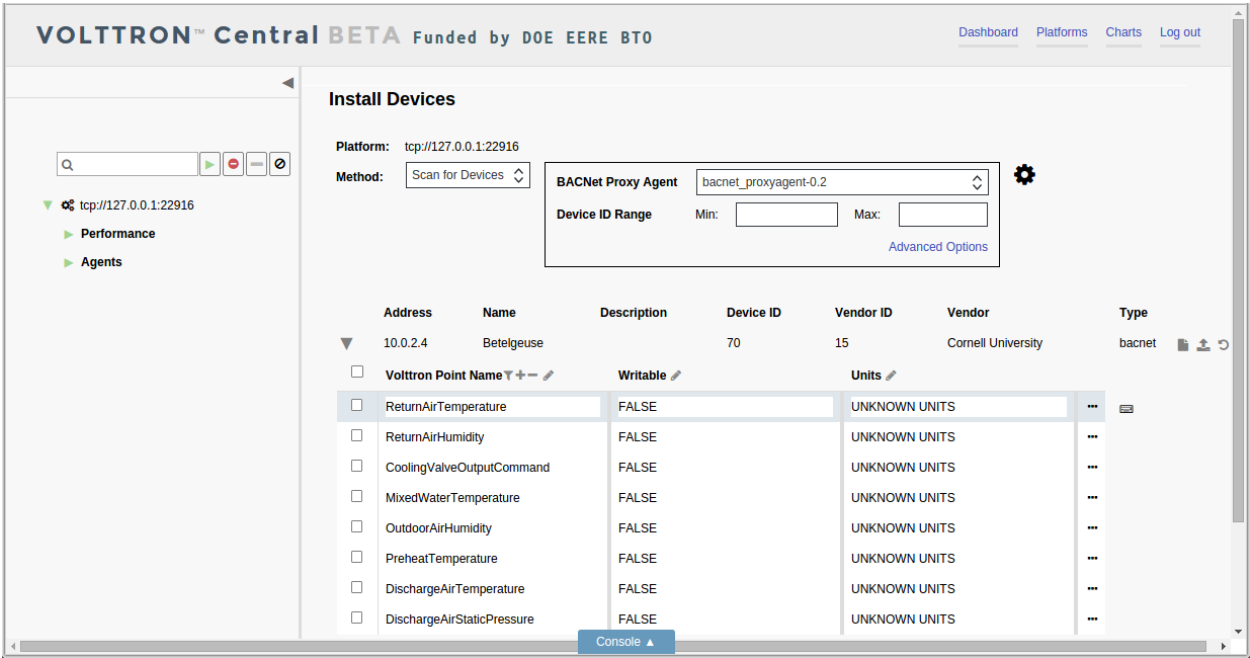


To replace all the matched terms in the column, click on the *Replace All* button. Click the *Clear Search* button to end the search.

## Keyboard Commands

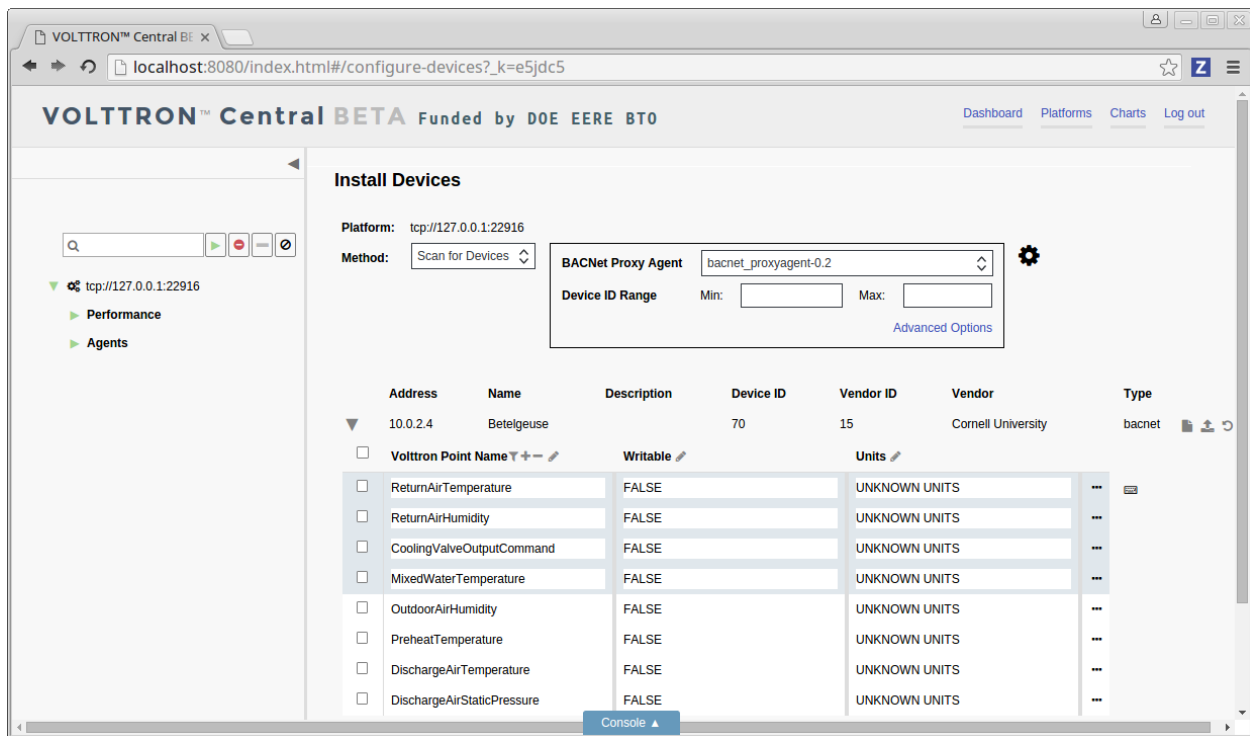
Some keyboard commands are available to expedite the selection or de-selection of points. To initiate use of the keyboard commands, strike the *Control* key on the keyboard. For keyboard commands to be activated, the registry configuration editor has to have focus, which comes from interacting with it. But the commands won't be activated if the cursor is in a type-able field.

If the keyboard commands have been successfully activated, a faint highlight will appear over the first row in the registry configuration editor.

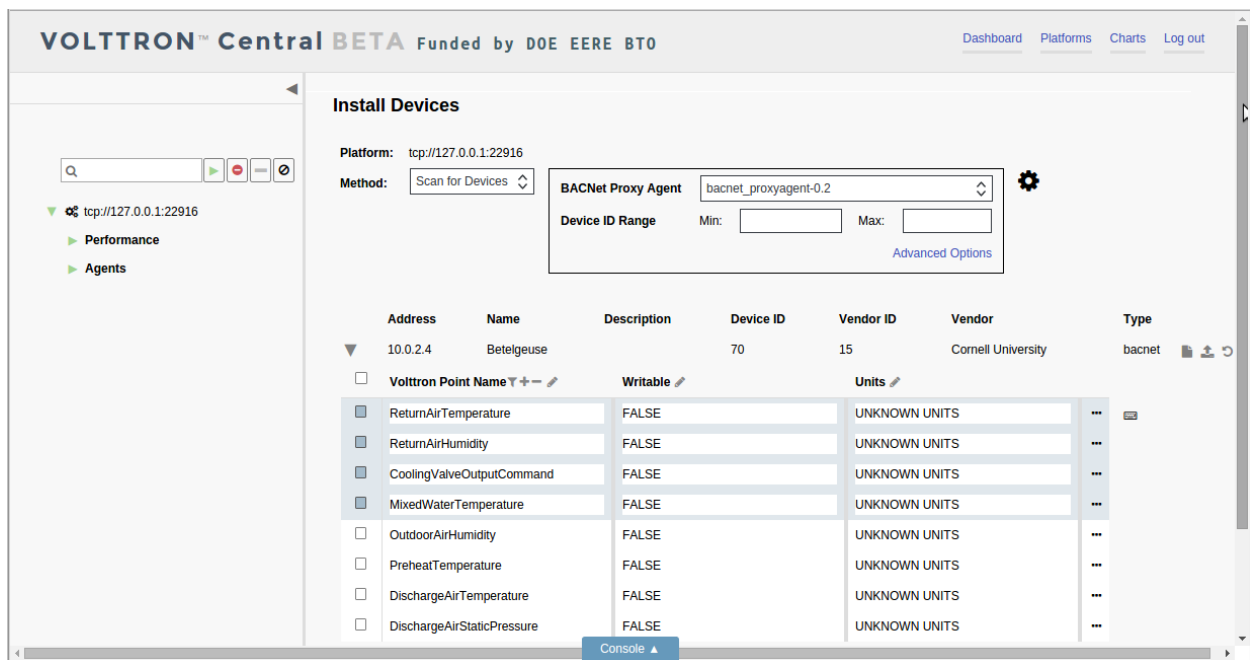


Keyboard commands are deactivated when the mouse cursor moves over the configuration editor. If unintentional deactivation occurs, strike the *Control* key again to reactivate the commands.

With keyboard commands activated, the highlighted row can be advanced up or down by striking the *up* or *down arrow* on the keyboard. A group of rows can be highlighted by striking the up or down arrow while holding down the *Shift* key.

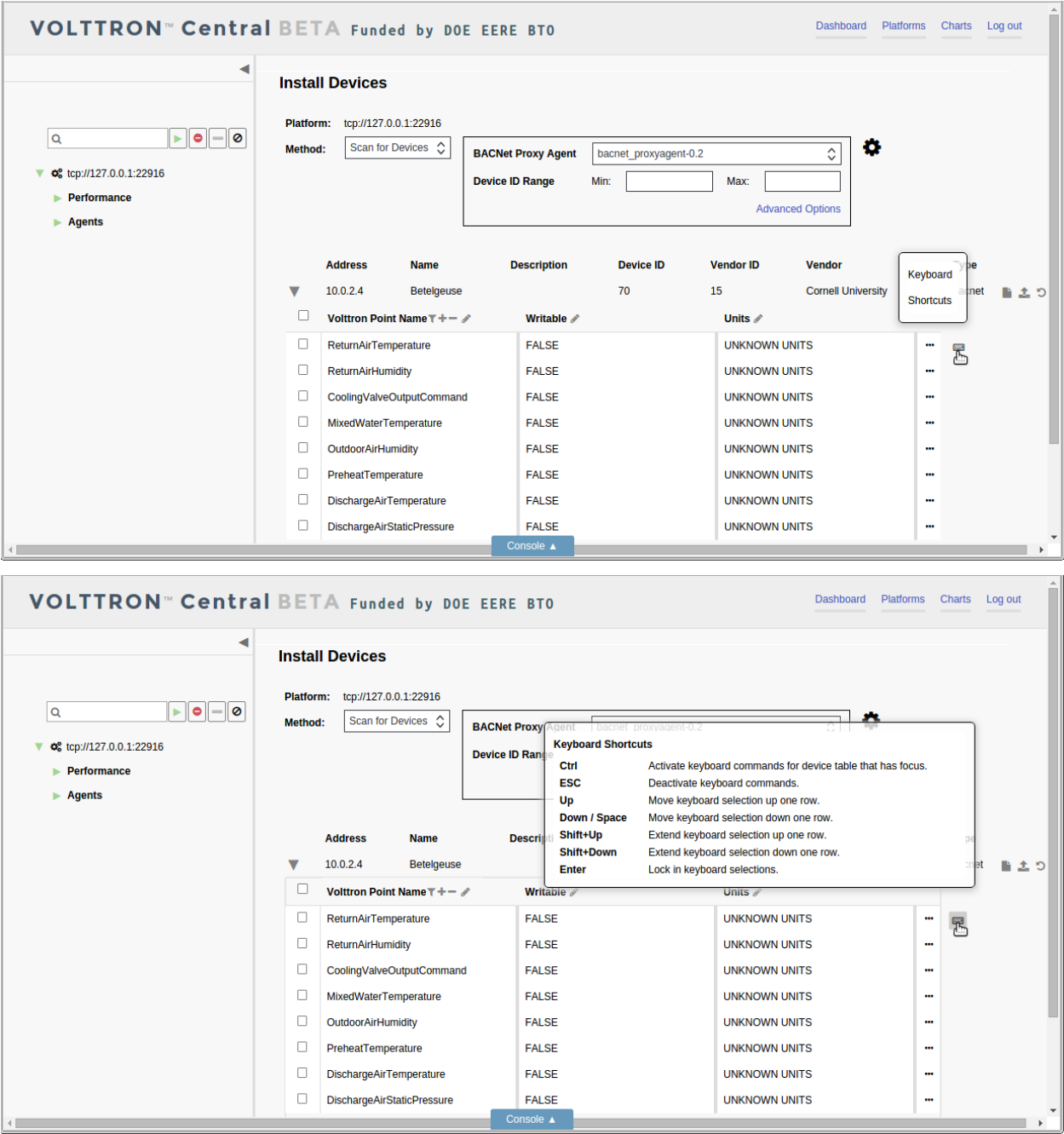


To select the highlighted rows, strike the *Enter* key.



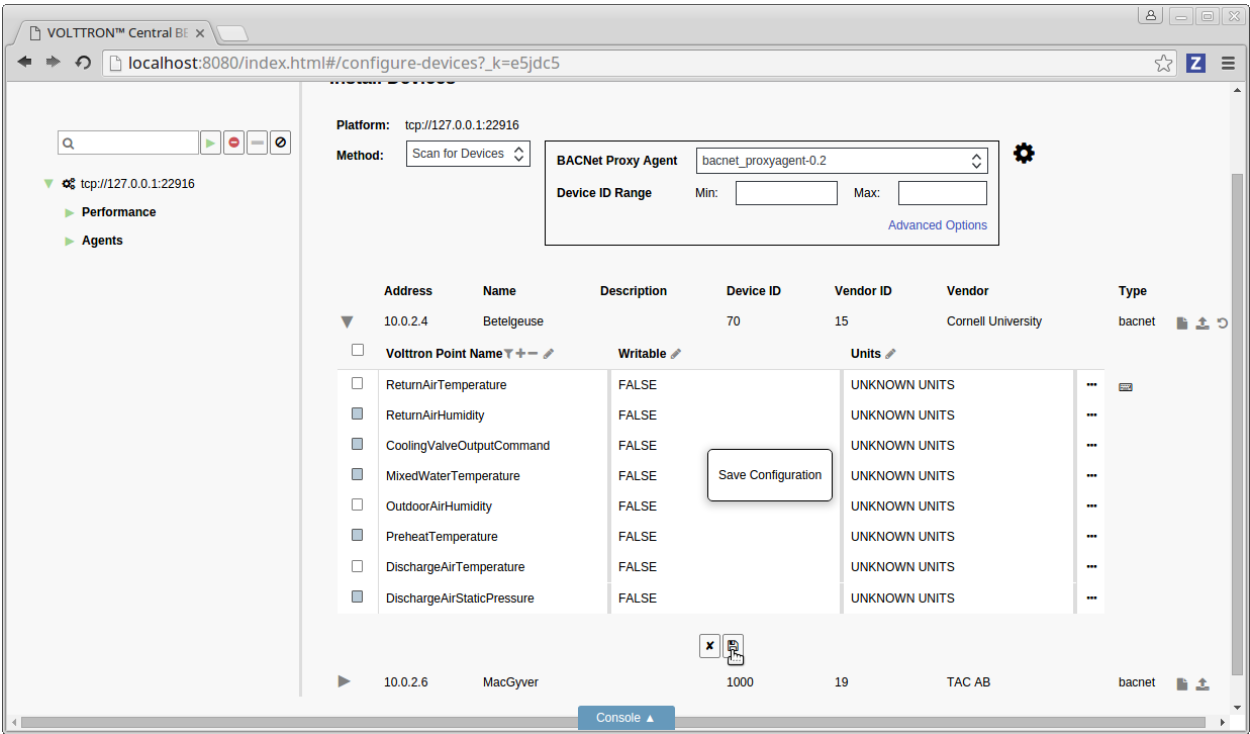
Striking the *Enter* key with rows highlighted will also deselect any rows that were already selected.

Click on the *Keyboard Shortcuts* button to show a popup list of the available keyboard commands.

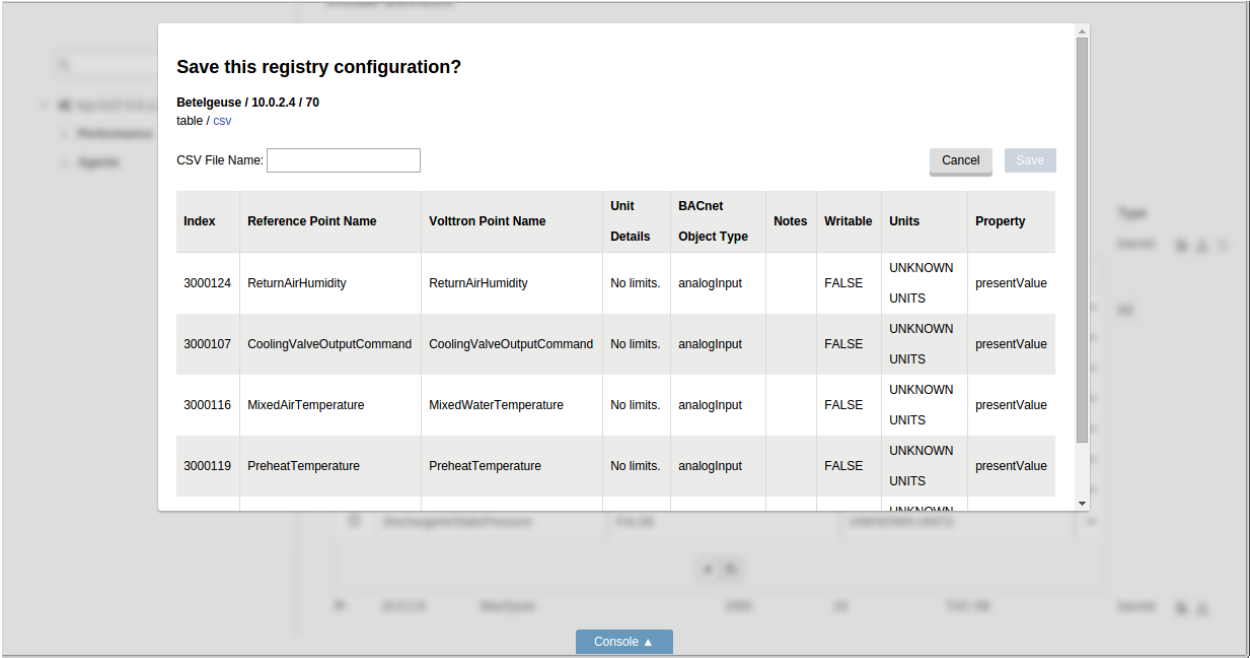


Registry Preview

To save the registry configuration, click the *Save* button at the bottom of the registry configuration editor.

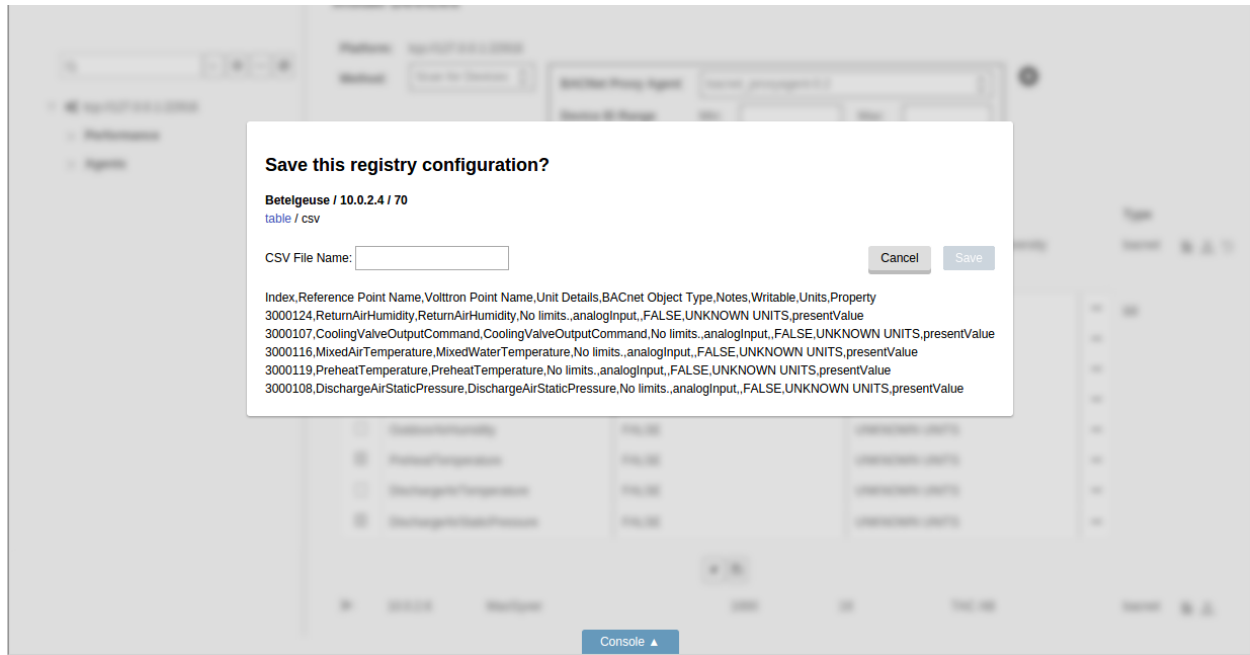


A preview will appear to let you confirm that the configuration is what you intended.

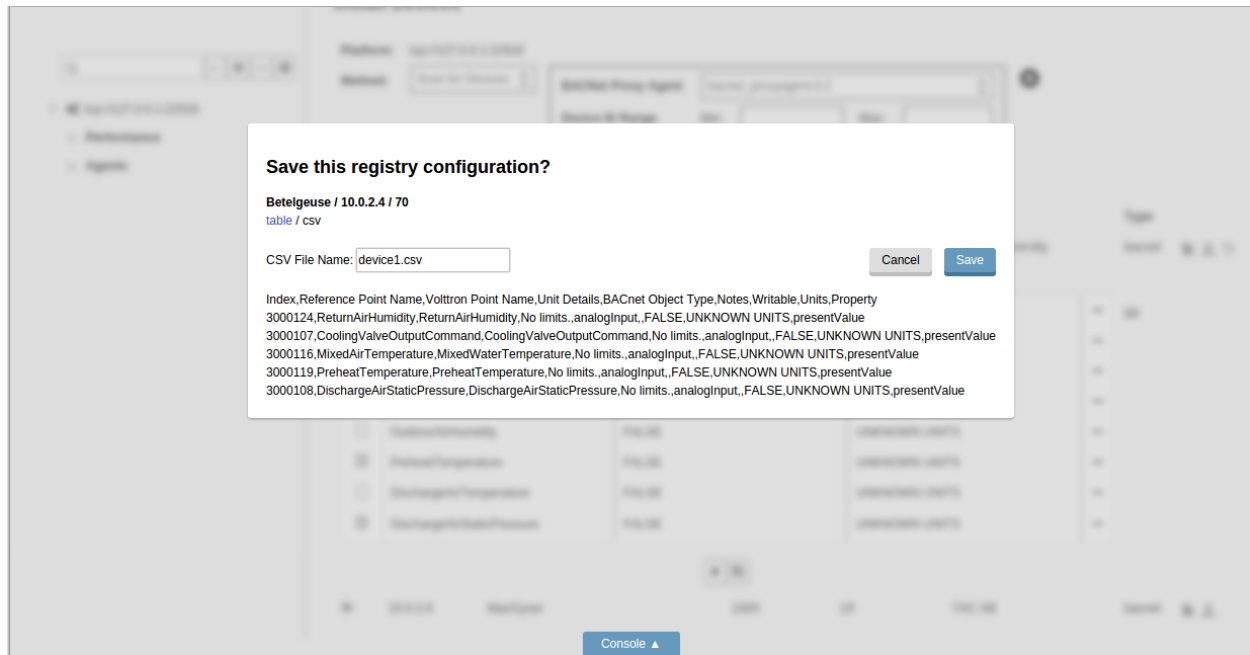


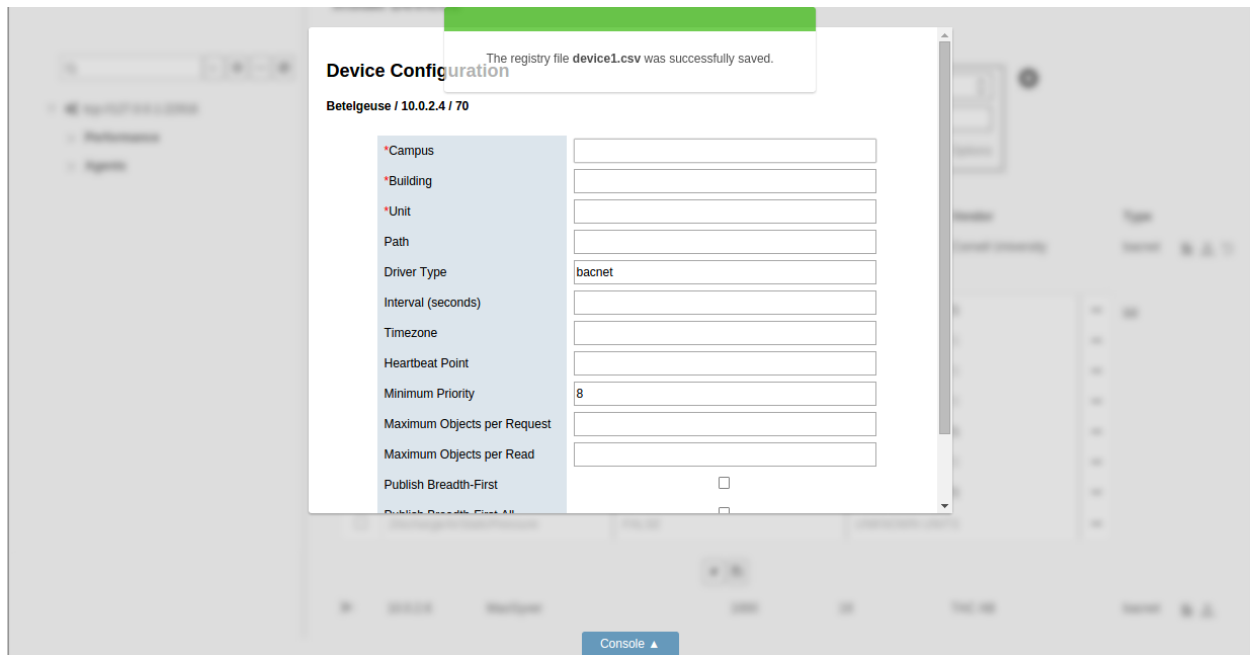
The configuration also can be inspected in the comma-separated format of the actual registry configuration file.





Provide a name for the registry configuration file, and click the *Save* button to save the file.

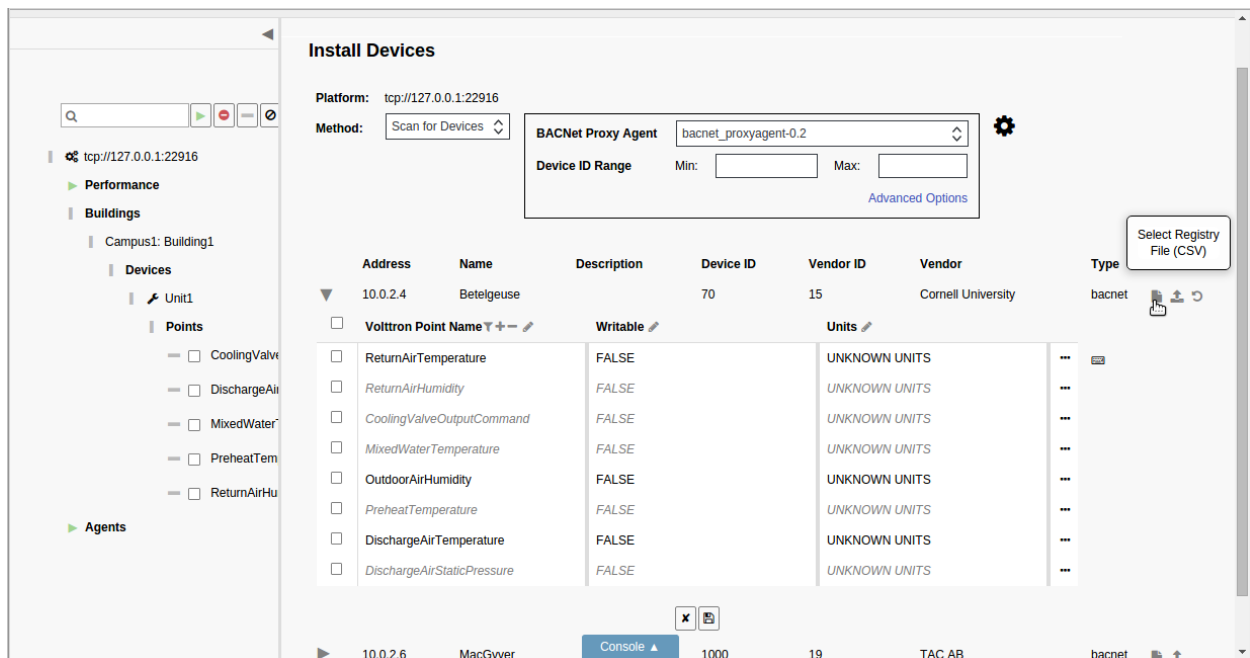




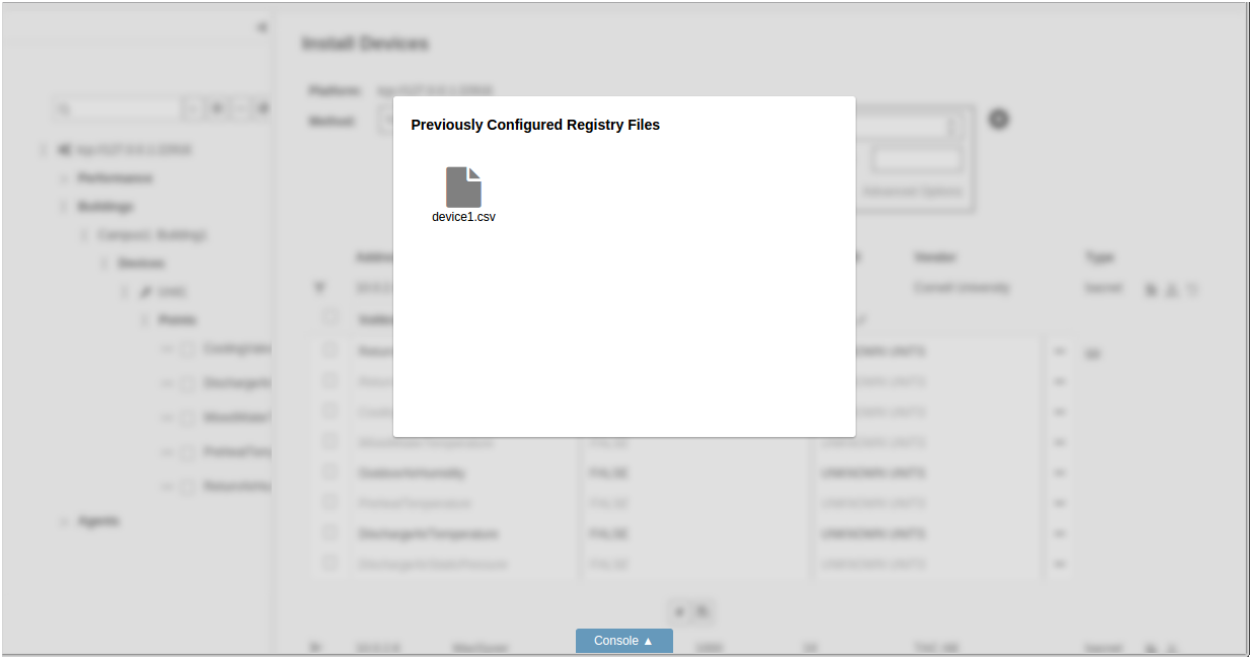
## Registry Configuration Options

Different subsets of configured points can be saved from the same physical device and used to create separate registry files for multiple virtual devices and sub-devices. Likewise, a single registry file can be reused by multiple virtual devices and sub-devices.

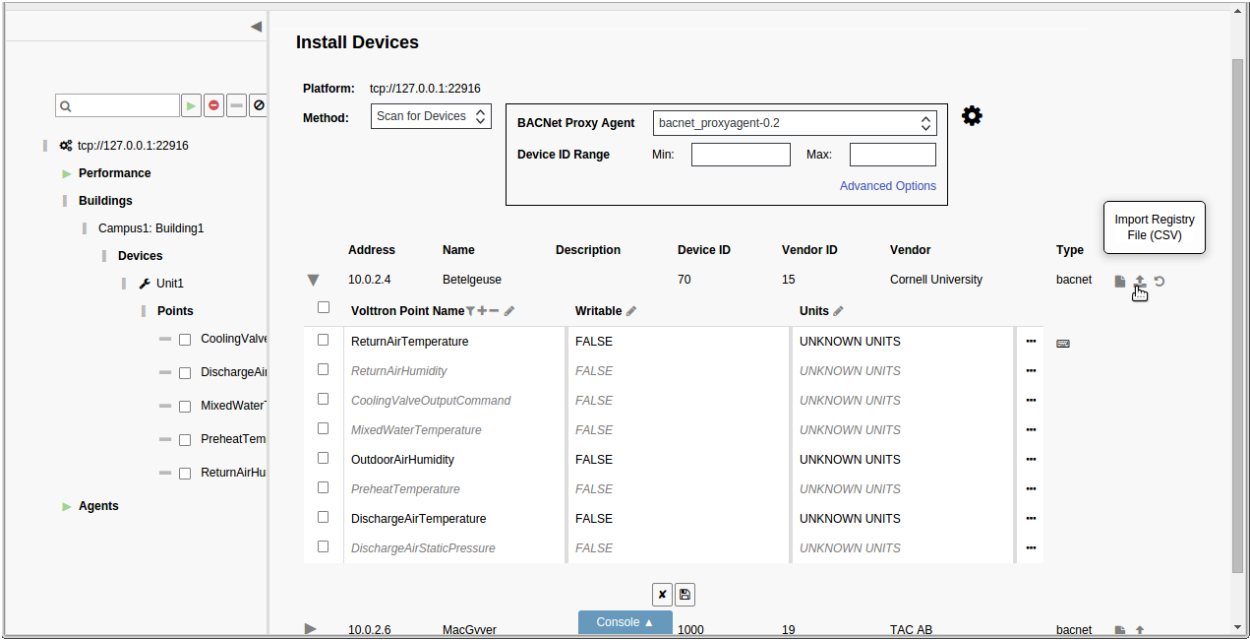
To reuse a previously saved registry file, click on the *Select Registry File (CSV)* button at the end of the physical device's listing.



The *Previously Configured Registry Files* window will appear, and a file can be selected to load it into the registry configuration editor.

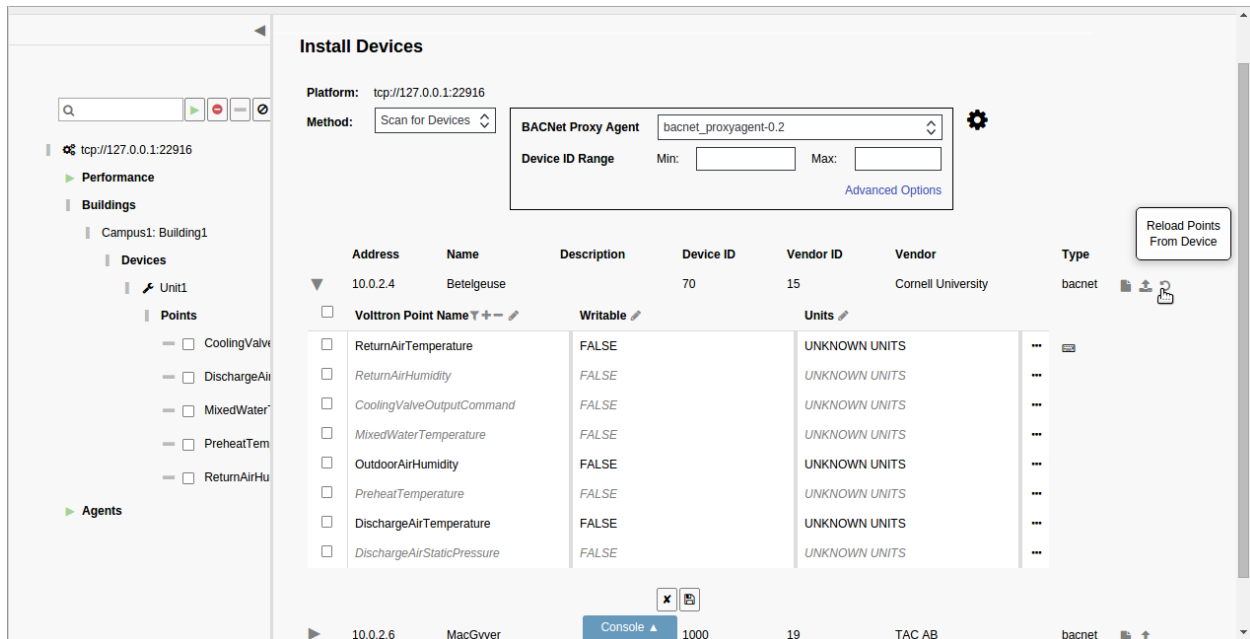


Another option is to import a registry configuration file from the computer running the VOLTRON Central web application, if one has been saved to local storage connected to the computer. To import a registry configuration file from local storage, click on the *Import Registry File (CSV)* button at the end of the physical device’s listing, and use the file selector window to locate and load the file.



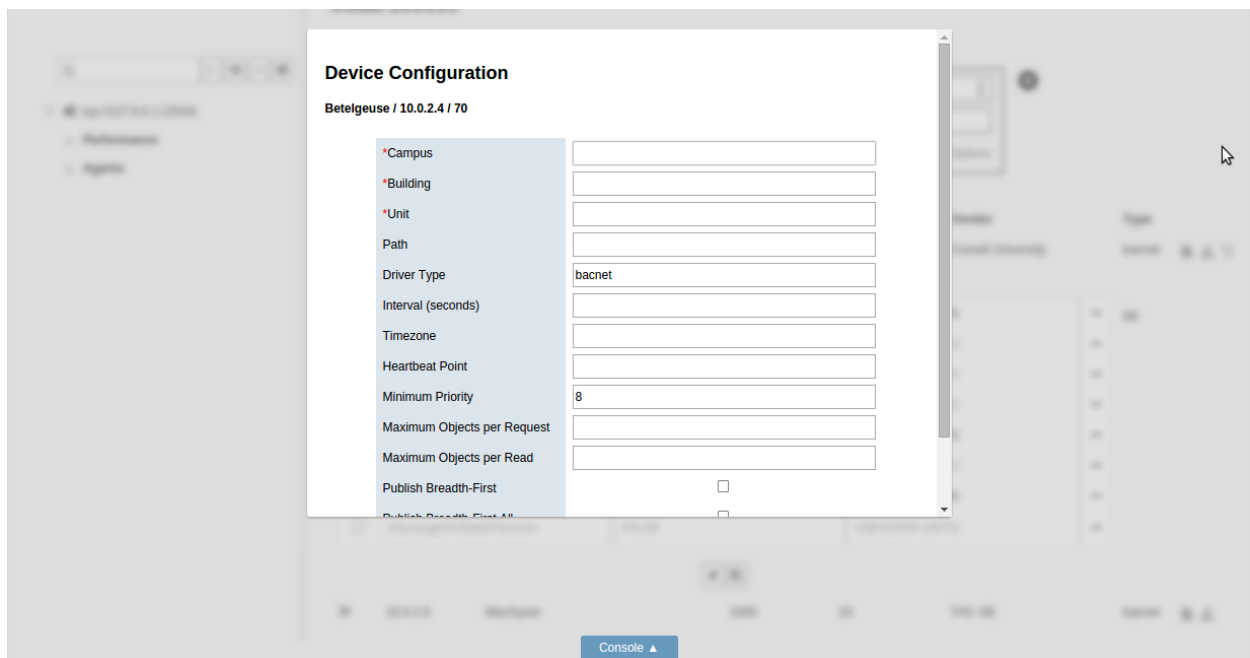
## Reloading Device Points

Once a physical device has been scanned, the original points from the scan can be reloaded at any point during device configuration by clicking on the *Reload Points From Device* button at the end of the device's listing.

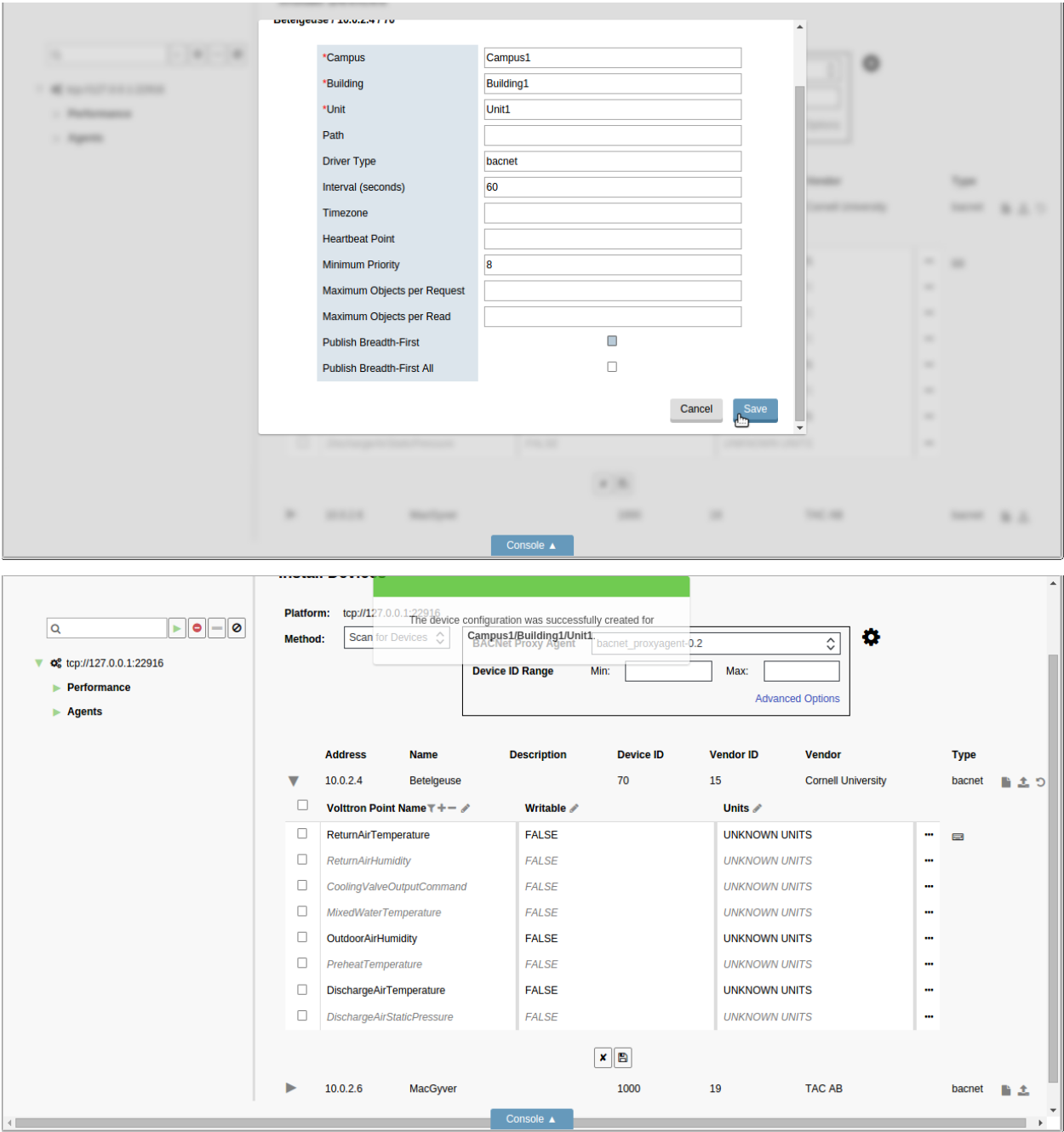


## Device Configuration Form

After the registry configuration file has been saved, the device configuration form appears. Creating the device configuration results in the virtual device being installed in the platform and determines the device's position in the side panel tree. It also contains some settings that determine how data is collected from the device.

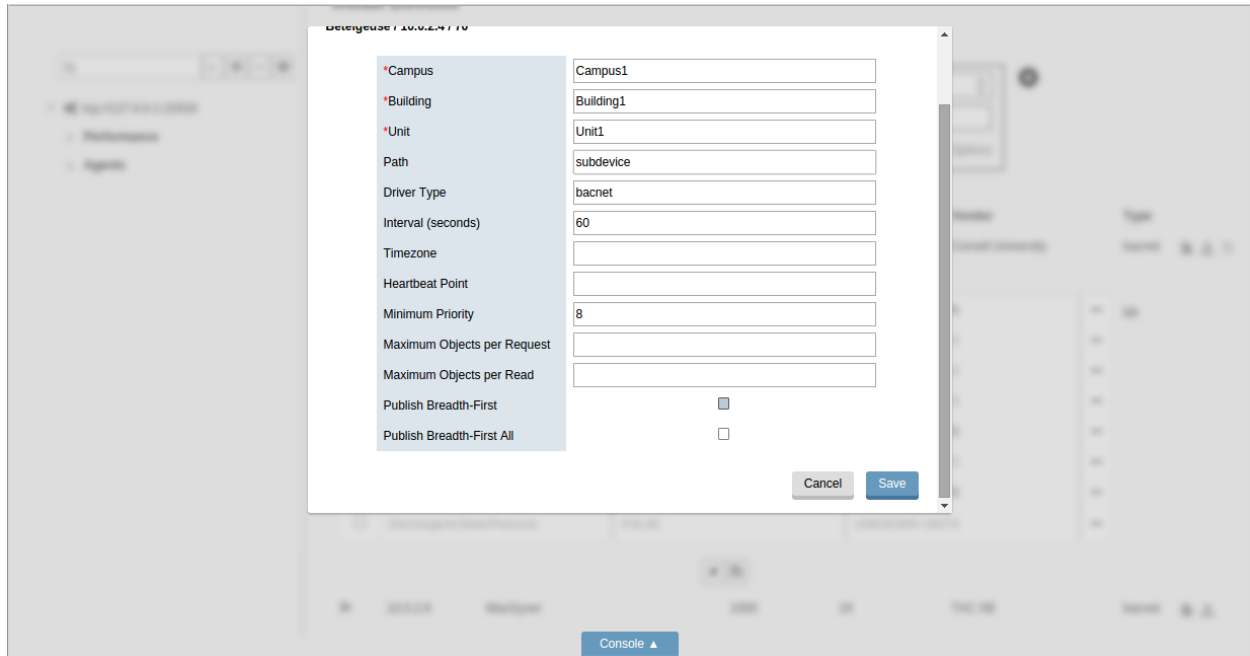


After the device configuration settings have been entered, click the *Save* button to save the configuration and add the device to the platform.



## Configuring Sub-devices

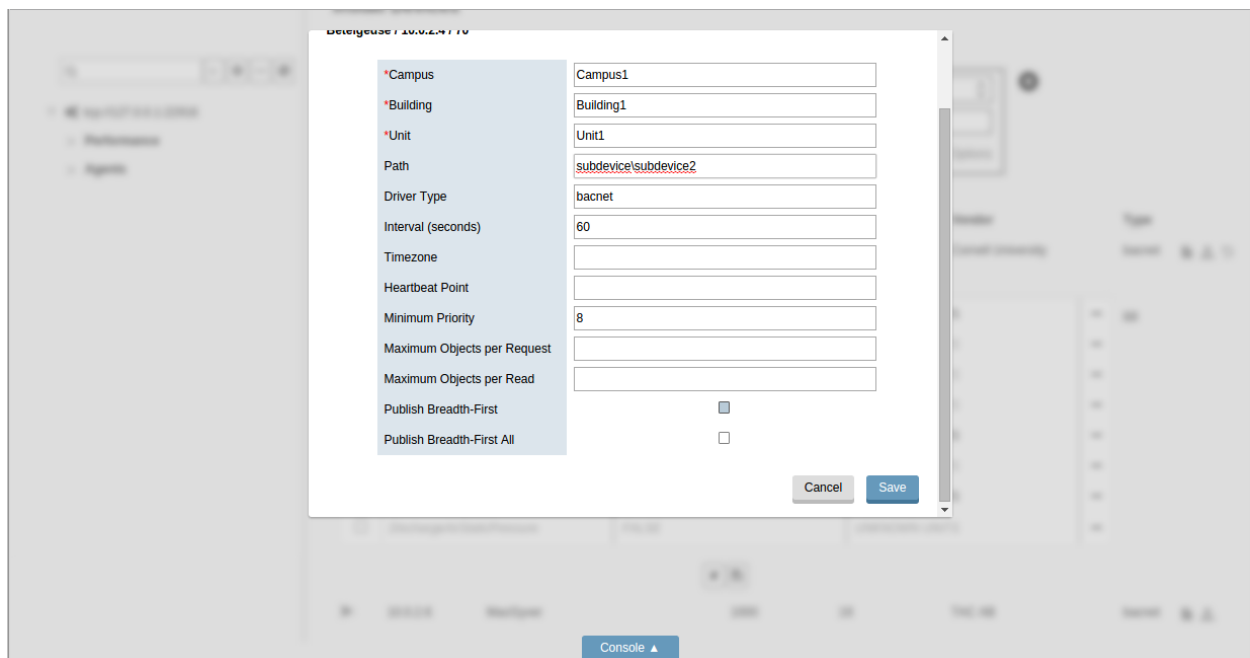
After a device has been configured, sub-devices can be configured by pointing to their position in the `Path` attribute of the device configuration form. But a sub-device can't be configured until its parent device has been configured first.



The screenshot shows a configuration window titled "Device Configuration" with a sidebar on the left containing a tree view. The main area contains a form with the following fields:

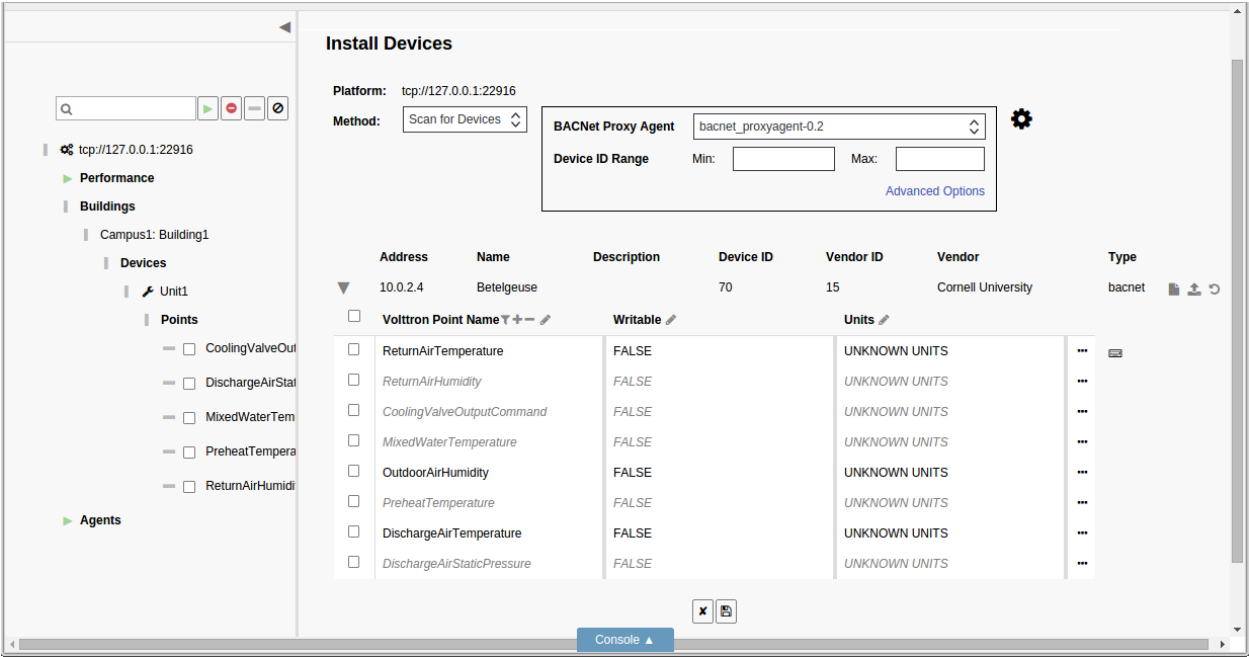
Field	Value
*Campus	Campus1
*Building	Building1
*Unit	Unit1
Path	subdevice
Driver Type	bacnet
Interval (seconds)	60
Timezone	
Heartbeat Point	
Minimum Priority	8
Maximum Objects per Request	
Maximum Objects per Read	
Publish Breadth-First	<input checked="" type="checkbox"/>
Publish Breadth-First All	<input type="checkbox"/>

At the bottom right of the form are "Cancel" and "Save" buttons. The sidebar on the left shows a tree view with a "Console" button at the bottom.



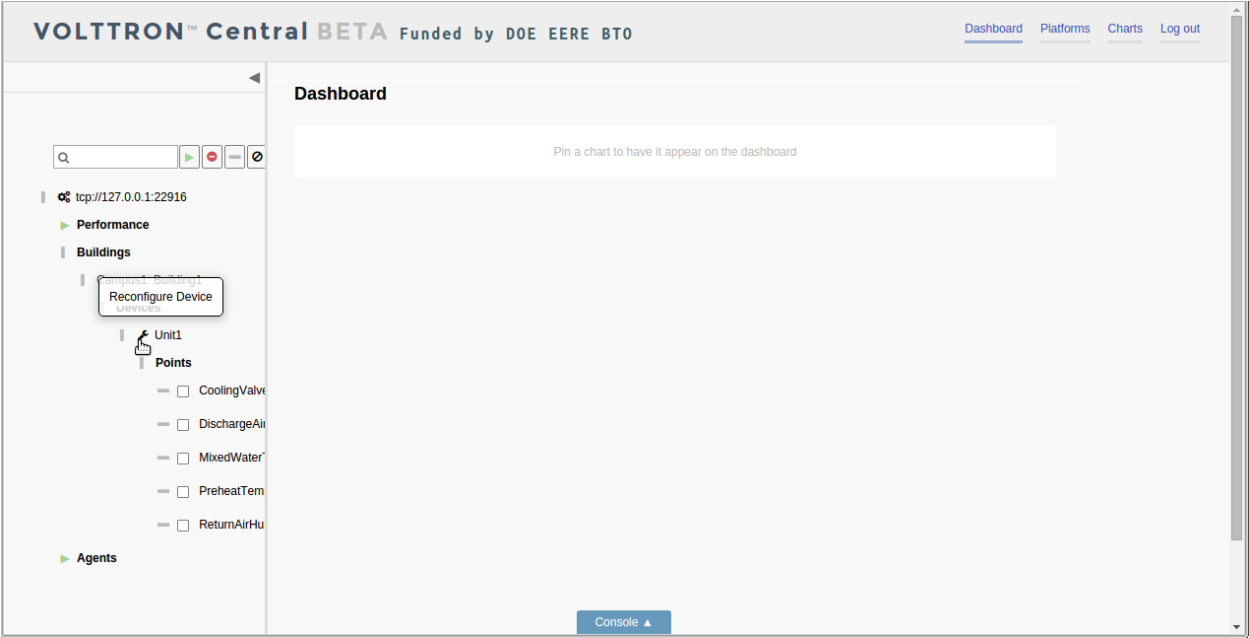
The screenshot shows the same configuration window as above, but with the "Path" field set to "subdevice/subdevice2". The "Publish Breadth-First" checkbox is still checked, and the "Publish Breadth-First All" checkbox is still unchecked. The "Cancel" and "Save" buttons are at the bottom right. The sidebar on the left shows a tree view with a "Console" button at the bottom.

As devices are configured, they're inserted into position in the side panel tree, along with their configured points.

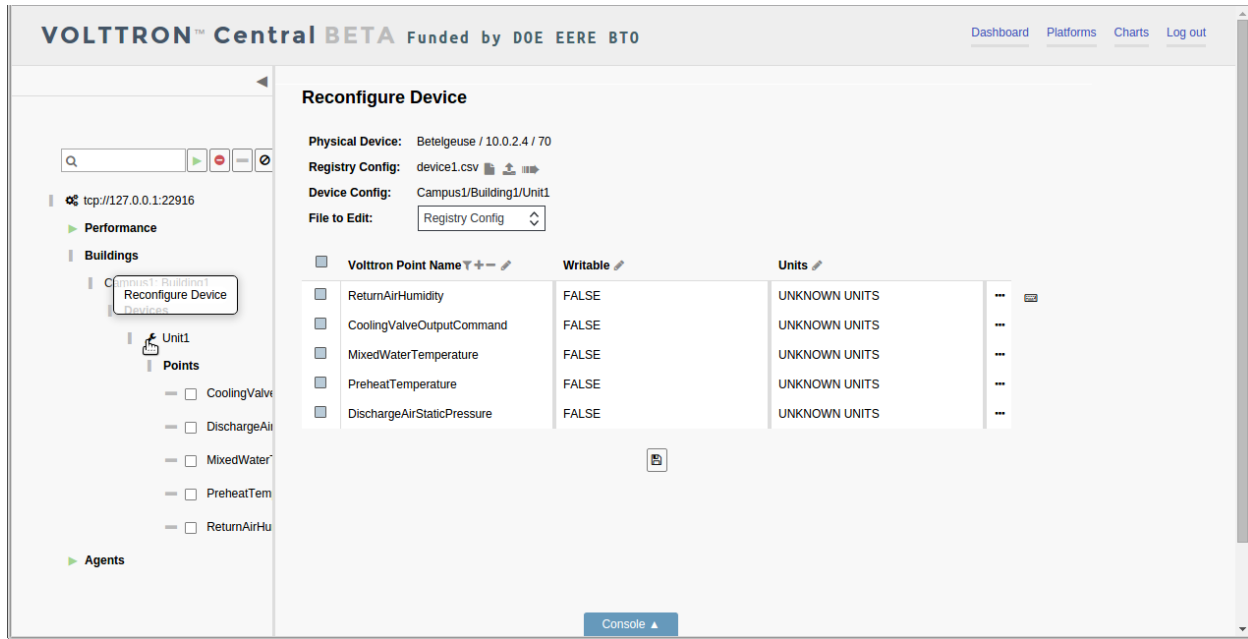


Reconfiguring Devices

A device that’s been added to a VOLTRON instance can be reconfigured by changing its registry configuration or its device configuration. To launch reconfiguration, click on the wrench button next to the device in the side panel tree.



Reconfiguration reloads the registry configuration editor and the device configuration form for the virtual device. The editor and the form work the same way in reconfiguration as during initial device configuration.

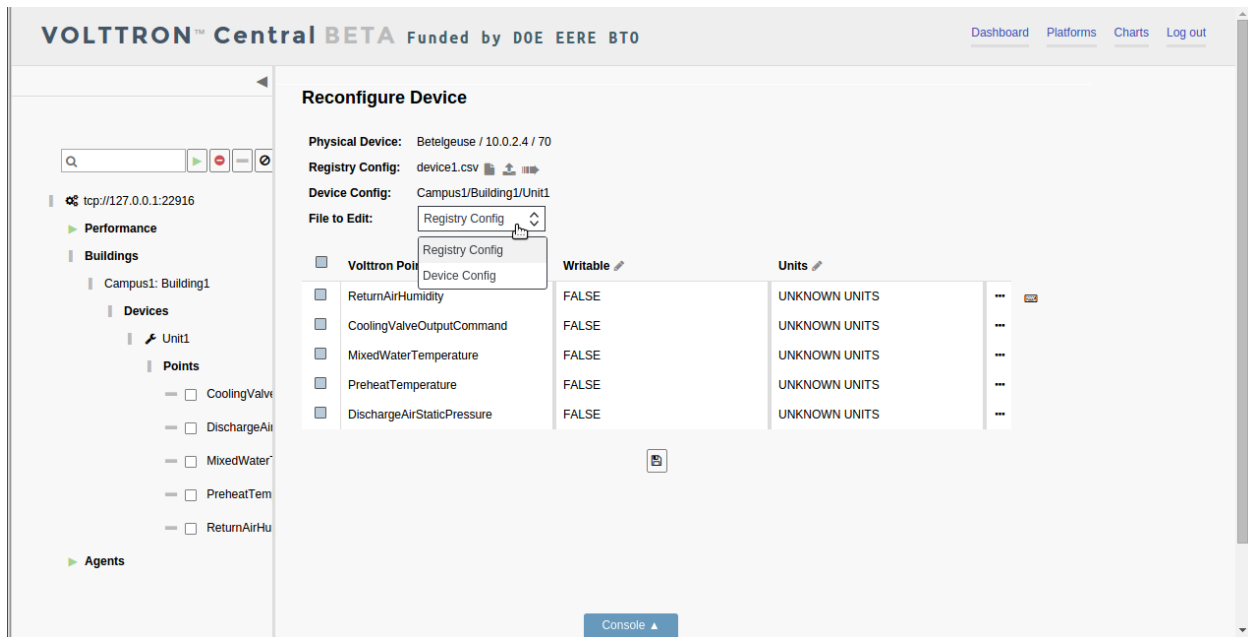


The reconfiguration view shows the name, address, and ID of the physical device that the virtual device was configured from. It also shows the name of the registry configuration file associated with the virtual device as well as its configured path.

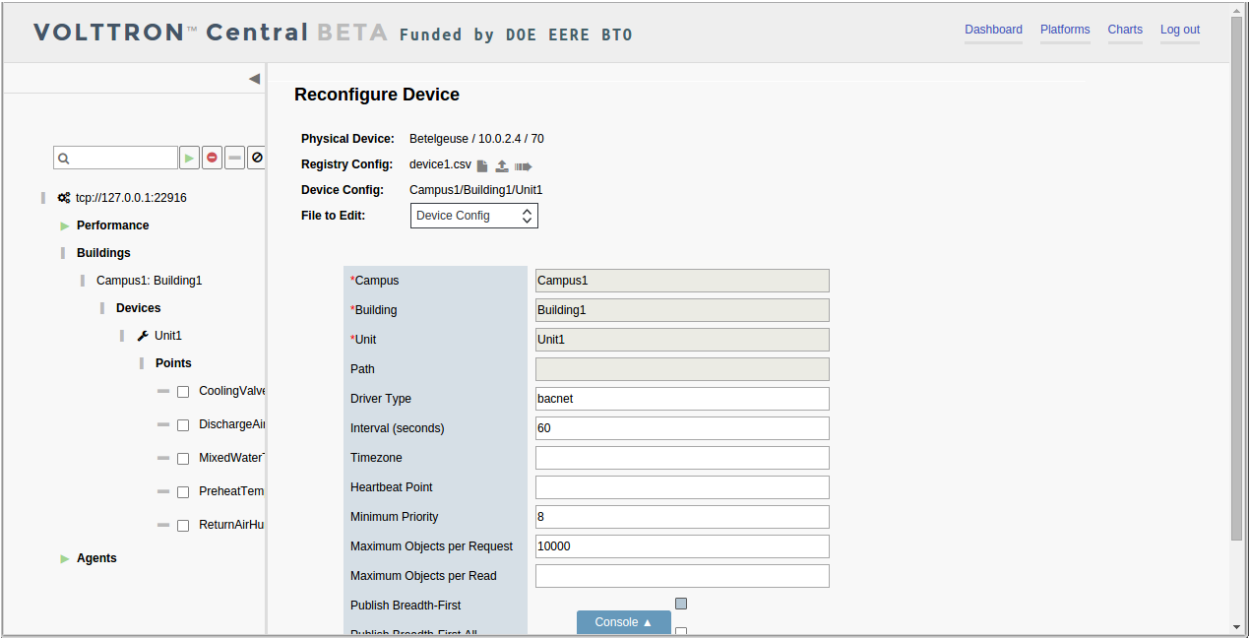
A different registry configuration file can be associated with the device by clicking on the *Select Registry File (CSV)* button or the *Import Registry File (CSV)* button.

The registry configuration can be edited by making changes to the configuration in the editor and clicking the *Save* button.

To make changes to the device configuration form, click on the *File to Edit* selector and choose *Device Config*.

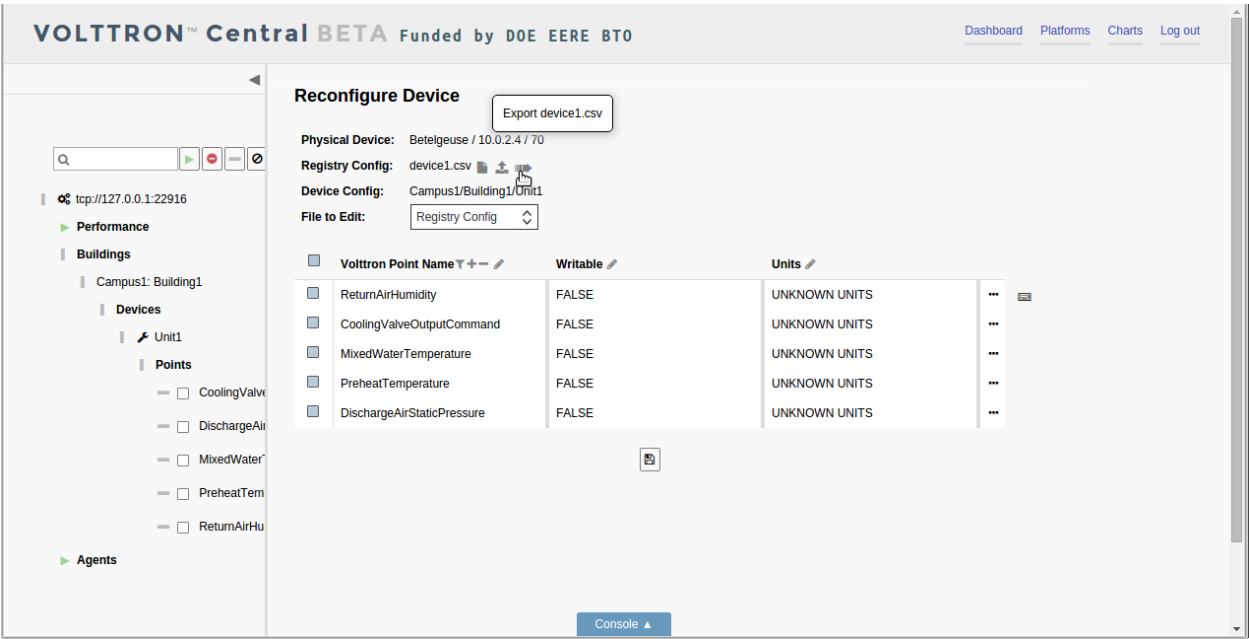






### Exporting Registry Configuration Files

The registry configuration file associated with a virtual device can be exported from the web browser to the computer's local storage by clicking on the *File Export* Button in the device reconfiguration view.



## VOLTTRON Central Web Services Api Documentation

VOLTTRON Central (VC) is meant to be the hub of communication within a cluster of VOLTTRON instances. VC exposes a [JSON-RPC 2.0](#) based API that allows a user to control multiple instances of VOLTTRON.

### Why JSON-RPC

SOAP messaging is unfriendly to many developers, especially those wanting to make calls in a browser from AJAX environment. We have therefore have implemented a JSON-RPC API capability to VC, as a more JSON/JavaScript friendly mechanism.

### How the API is Implemented

- All calls are made through a POST to `/vc/jsonrpc`
- All calls (not including the call to authenticate) will include an authorization token (a json-rpc extension).

### JSON-RPC Request Payload

All posted JSON payloads will look like the following block:

```
{
  "jsonrpc": "2.0",
  "method": "method_to_invoke",
  "params": {
    "param1name": "param1value",
    "param2name": "param2value"
  },
  "id": "unique_message_id",
  "authorization": "server_authorization_token"
}
```

As an alternative, the params can be an array as illustrated by the following:

```
{
  "jsonrpc": "2.0",
  "method": "method_to_invoke",
  "params": [
    "param1value",
    "param2value"
  ],
  "id": "unique_message_id",
  "authorization": "server_authorization_token"
}
```

For full documentation of the *Request* object please see section 4 of the [JSON-RPC 2.0](#) specification.

## JSON-RPC Response Payload

All responses shall have either an error response or a result response. The result key shown below can be a single instance of a JSON type, an array or a JSON object.

A result response will have the following format:

```
{
  "jsonrpc": "2.0",
  "result": "method_results",
  "id": "sent_in_unique_message_id"
}
```

An error response will have the following format:

```
{
  "jsonrpc": "2.0",
  "error": {
    "code": "standard_code_or_extended_code",
    "message": "error message"
  },
  "id": "sent_in_unique_message_id_or_null"
}
```

For full documentation of the Response object please see section 5 of the [JSON-RPC 2.0](#) specification.

## JSON-RPC Data Objects

Table 7: Platform

Key	Type	Value
uuid	string	A unique identifier for the platform.
name	string	A user defined string for the platform.
status	Status	A status object for the platform.

Table 8: PlatformDetails

Key	Type	Value
uuid	string	A unique identifier for the platform.
name	string	A user defined string for the platform.
status	Status	A status object for the platform.

Table 9: Agent

Key	Type	Value
uuid	string	A unique identifier for the agent.
name	string	Defaults to the agentid of the installed agent
tag	string	A shortcut that can be used for referencing the agent
priority	int	If this is set the agent will autostart on the instance.
process_id	int	The process id or null if not running.
status	string	A status string made by the status rpc call, on an agent.

Table 10: DiscoveryRegistryEntry

Key	Type	Value
name		
discovery_address		

Table 11: AdvancedRegistryEntry\_TODO

Key	Type	Value
name		
vip_address		

Table 12: Agent\_TODO

Key	Type	Value
uuid	string	A unique identifier for the platform.
name	string	A user defined string for the platform.
status	Status	A status object for the platform.

Table 13: Building\_TODO

Key	Type	Value
uuid	string	A unique identifier for the platform.
name	string	A user defined string for the platform.
status	Status	A status object for the platform.

Table 14: Device\_TODO

Key	Type	Value
uuid	string	A unique identifier for the platform.
name	string	A user defined string for the platform.
status	Status	A status object for the platform.

Table 15: Status

Key	Type	Value
status	string	A value of GOOD, BAD, UNKNOWN, SUCCESS, FAIL
context	string	Provides context about what the status means (optional)

## JSON-RPC API Methods

Table 16: Methods

method	parameters	returns
get_authentication	(username, password)	authentication token

## Messages

### Retrieve Authorization Token

```
# POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "get_authorization",
  "params": {
    "username": "dorothy",
    "password": "toto123"
  },
  "id": "someID"
}
```

#### Response Success

```
# 200 OK
{
  "jsonrpc": "2.0",
  "result": "someAuthorizationToken",
  "id": "someID"
}
```

#### Failure

```
HTTP Status Code 401
```

### Register a VOLTRON Platform Instance (Using Discovery)

```
# POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "register_instance",
  "params": {
    "discovery_address": "http://127.0.0.2:8080",
    "display_name": "foo" # Optional
  }
  "authorization": "someAuthorizationToken",
  "id": "someID"
}
```

#### Success

```
# 200 OK
{
  "jsonrpc": "2.0",
  "result": {
    "status": {
      "code": "SUCCESS"
      "context": "Registered instance foo" # or the uri if not
↪specified.
    },
  },
  "id": "someID"
}
```

### Unregister a Volttron Platform Instance

```
# POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "unregister_platform",
  "params": {
    "platform_uuid": "somePlatformUuid",
  }
  "authorization": "someAuthorizationToken",
  "id": "someID"
}
```

### Retrieve Managed Instances

```
#POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "list_platforms",
  "authorization": "someAuthorizationToken",
  "id": #
}
```

### Response Success

```
200 OK
{
  "jsonrpc": "2.0",
  "result": [
    {
      "name": "platform1",
      "uuid": "abcd1234-ef56-ab78-cd90-efabcd123456",
      "health": {
        "status": "GOOD",
        "context": null,
        "last_updated": "2016-04-27T19:47:05.184997+00:00"
      }
    },
    {
      "name": "platform2",
      "uuid": "0987fedc-65ba-43fe-21dc-098765bafedc",
      "health": {
        "status": "BAD",
        "context": "Expected 9 agents running, but only 5 are",
        "last_updated": "2016-04-27T19:47:05.184997+00:00",
      }
    },
    {
      "name": "platform3",
      "uuid": "0000aaaa-1111-bbbb-2222-cccc3333dddd",
      "health": {
        "status": "GOOD",
        "context": "Currently scraping 20 devices",
        "last_updated": "2016-04-27T19:47:05.184997+00:00",
      }
    }
  ],
  "id": #
}
```

## Retrieve Installed Agents From Platform

```
# POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "platforms.uuid.abcd1234-ef56-ab78-cd90-efabcd123456.list_agents",
  "authorization": "someAuthorizationToken",
  "id": #
}
```

### Response Success

```
200 OK
{
  "jsonrpc": "2.0",
  "result": [
    {
      "name": "HelloAgent",
      "identity": "helloagent-0.0_1",
      "uuid": "alb2c3d4-e5f6-a7b8-c9d0-elf2a3b4c5d6",
      "process_id": 3142,
      "error_code": null,
      "is_running": true,
      "permissions": {
        "can_start": true,
        "can_stop": true,
        "can_restart": true,
        "can_remove": true
      }
      "health": {
        "status": "GOOD",
        "context": null
      }
    },
    {
      "name": "Historian",
      "identity": "sqlhistorianagent-3.5.0_1",
      "uuid": "alb2c3d4-e5f6-a7b8-c9d0-elf2a3b4c5d6",
      "process_id": 3143,
      "error_code": null,
      "is_running": true,
      "permissions": {
        "can_start": true,
        "can_stop": true,
        "can_restart": true,
        "can_remove": true
      }
      "health": {
        "status": "BAD",
        "context": "No publish in last 5 minutes"
      }
    },
    {
      "name": "VolltronCentralPlatform",
      "identity": "platform.agent",
      "uuid": "alb2c3d4-e5f6-a7b8-c9d0-elf2a3b4c5d6",
      "process_id": 3144,
```

(continues on next page)

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```

        "error_code": null,
        "is_running": true,
        "permissions": {
            "can_start": false,
            "can_stop": false,
            "can_restart": true,
            "can_remove": false
        }
        "health": {
            "status": "BAD",
            "context": "One agent has reported bad status"
        }
    },
    {
        "name": "StoppedAgent-0.1",
        "identity": "stoppedagent-0.1_1",
        "uuid": "a1b2c3d4-e5f6-a7b8-c9d0-e1f2a3b4c5d6",
        "process_id": null,
        "error_code": 0,
        "is_running": false,
        "health": {
            "status": "UNKNOWN",
            "context": "Error code -15"
        }
        "permissions": {
            "can_start": true,
            "can_stop": false,
            "can_restart": true,
            "can_remove": true
        }
    }
],
    "id": #
}

```

## Install Agent

```

# POST /vc/jsonrpc
{
    "jsonrpc": "2.0",
    "method": "platforms.uuid.0987fedc-65ba-43fe-21dc-098765bafedc.install",
    "params": {
        "files": [
            {
                "file_name": "helloagent-0.1-py2-none-any.whl",
                "file": "data:application/octet-stream;base64,..."
            },
            {
                "file_name": "some-non-wheel-file.txt",
                "file": "data:application/octet-stream;base64,..."
            },
            ...
        ],
        "authorization": "someAuthorizationToken",
        "id": #
    }
}

```



**Success Response**

```
200 OK
{
  "jsonrpc": "2.0",
  "result": {
    [
      {
        "uuid": "a1b2c3d4-e5f6-a7b8-c9d0-elf2a3b4c5d6"
      },
      {
        "error": "Some error message"
      },
      ...
    ]
  },
  "id": #
}
```

**Remove An Agent**

```
# POST /vc/jsonrpc
{
  "jsonrpc": "2.0",
  "method": "platforms.uuid.0987fedc-65ba-43fe-21dc-098765bafedc.remove_agent",
  "params": ["a1b2c3d4-e5f6-a7b8-c9d0-elf2a3b4c5d6"],
  "authorization": "someAuthorizationToken",
  "id": #
}
```

**Response Success**

```
200 OK
{
  "jsonrpc": "2.0",
  "result": {
    "process_id": 1000,
    "return_code": 0
  },
  "id": #
}
```

## 2.11 Operations

Operations agents assist with the operations of the platform systems and provide alerts for various platform and environmental conditions. For details on each, please refer to the corresponding documents.

**Attention:** All operations agents are located within the **operations** directory.

```
services/ops/
```

### 2.11.1 Emlaler Agent

Emlaler agent is responsible for sending emails for an instance. It has been written so that any agent on the instance can send emails through it via the “send\_email” method or through the pubsub message bus using the topic “platform/send\_email”.

By default any alerts will be sent through this agent. In addition all emails will be published to the “record/sent\_email” topic for a historian to be able to capture that data.

#### Configuration

A typical configuration for this agent is as follows. We need to specify the SMTP server address, email address of the sender, email addresses of all the recipients and minimum time for duplicate emails based upon the key.

```
{
  "smtp-address": "smtp.foo.com",
  "from-address": "billy@foo.com",
  "to-addresses": ["ann@foo.com", "bob@gmail.com"],
  "allow-frequency-minutes": 10
}
```

Finally package, install and start the agent. For more details, see [Agent Creation Walk-through](#)

### 2.11.2 Failover Agent

#### Introduction

The failover agent provides a generic high availability option to VOLTTRON. When the **primary** platform becomes inactive the **secondary** platform will start an installed agent.

#### Standard Failover

There are two behavior patterns implemented in the agent. In the default configuration, the secondary instance will ask Volttron Central to verify that the primary instance is down. This helps to avoid a split brain scenario. If neither Volttron Central nor the other failover instance is reachable then the failover agent will stop the agent it is managing. These states are shown in the tables below.

##### Primary Behavior

	VC Up	VC Down
Secondary Up	start	start
Secondary Down	start	stop

##### Secondary Behavior

	VC Up	VC Down
Primary Up	stop	stop
Primary Down	Verify with VC before starting	stop

## Simple Failover

There is also a *simple* configuration available that does not involve coordination with Volttron Central. The secondary agent will start its managed agent if believes the primary to be inactive. The simple primary always has its managed agent started.

## Configuration

Failover behavior is set in the failover agent's configuration file. Example primary and secondary configuration files are shown below.

<pre>{   "agent_id": "primary",   "simple_behavior": true,    "remote_vip": "tcp://127.0.0.1:8001",   "remote_serverkey": "",    "agent_vip_identity": "platform.driver",   "heartbeat_period": 10,   "timeout": 120 }</pre>	<pre>{   "agent_id": "secondary",   "simple_behavior": true,    "remote_vip": "tcp://127.0.0.1:8000",   "remote_serverkey": "",    "agent_vip_identity": "platform.driver",   "heartbeat_period": 10,   "timeout": 120 }</pre>
--	--

- **agent\_id** - primary or secondary
- **simple\_behavior** - Switch to turn on or off simple behavior. Both instances should match.
- **remote\_vip** - Address where *remote\_id* can be reached.
- **remote\_serverkey** - The public key of the platform where *remote\_id* lives.
- **agent\_vip\_identity** - The *VIP Identity* of the agent that we want to manage.
- **heartbeat\_period** - Send a message to *remote\_id* with this period. Measured in seconds.
- **timeout** - Consider a platform inactive if a heartbeat has not been received for *timeout* seconds.

### 2.11.3 File Watch Publisher Agent

#### Introduction

FileWatchPublisher agent watches files for changes and publishes those changes per line on the corresponding topics. Files and topics should be provided in the configuration.

## Configuration

A simple configuration for FileWatchPublisher with two files to monitor is as follows:

```
{
  "files": [
    {
      "file": "/var/log/syslog",
      "topic": "platform/syslog"
    },
    {
      "file": "/home/volttron/tempfile.txt",
      "topic": "temp/filepublisher"
    }
  ]
}
```

Using this example configuration, FileWatchPublisher will watch syslog and tempFile.txt files and publish the changes per line on their respective topics.

### 2.11.4 Message Debugging

VOLTTRON agent messages are routed over the VOLTTRON message bus. The Message Debugger Agent provides enhanced examination of this message stream's contents as an aid to debugging and troubleshooting agents and drivers.

This feature is implemented to provide visibility into the ZeroMQ message bus. The RabbitMQ message bus includes methods for message debugging by default in the [RabbitMQ management UI](#).

When enabled, the Message Debugger Agent captures and records each message as it is routed. A second process, Message Viewer, provides a user interface that optimizes and filters the resulting data stream, either in real time or retrospectively, and displays its contents.

The Message Viewer can convey information about high-level interactions among VOLTTRON agents, representing the message data as conversations that can be filtered and/or expanded. A simple RPC call involving 4 individual message send/receive segments can be displayed as a single row, which can then be expanded to drill down into the message details. This results in a higher-level, easier-to-obtain view of message bus activity than might be gleaned by using `grep` on verbose log files.

Pub/Sub interactions can be summarized by topic, including counts of messages published during a given capture period by sender, receiver and topic.

Another view displays the most-recently-published message, or message exchange, that satisfies the current filter criteria, continuously updated as new messages are routed.

### Enabling the Message Debugger

In order to use the Message Debugger, two steps are required:

- VOLTTRON must have been started with a `--msgdebug` command line option.
- The Message Debugger Agent must be running.

When VOLTTRON has been started with `--msgdebug`, its Router publishes each message to an IPC socket for which the Message Debugger Agent is a subscriber. This is kept disabled by default because it consumes a significant quantity of CPU and memory resources, potentially affecting VOLTTRON timing and performance. So as a general rule, the `--msgdebug` option should be employed during development/debugging only, and should not be left enabled in a production environment.

Example of starting VOLTTTRON with the `--msgdebug` command line option:

```
(voltttron) ./start-voltttron ``--msgdebug``
```

If VOLTTTRON is running in this mode, the stream of routed messages is available to a subscribing Message Debugger Agent. It can be started from `voltttron-ctl` in the same fashion as other agents, for example:

```
(voltttron) $ vctl status
```

AGENT	IDENTITY	TAG	STATUS
fd listeneragent-3.2	listener	listener	
08 messagedebuggeragent-0.1	platform.messagedebugger	platform.messagedebugger	
e1 vcplatformagent-3.5.4	platform.agent	vcp	
47 volttroncentralagent-3.5.5	voltttron.central	vc	

```
(voltttron) $ vctl start 08
Starting 089c53f0-f225-4608-aecb-3e86e0df30eb messagedebuggeragent-0.1
```

```
(voltttron) $ vctl status
```

AGENT	IDENTITY	TAG	STATUS
fd listeneragent-3.2	listener	listener	
08 messagedebuggeragent-0.1	platform.messagedebugger	platform.messagedebugger	→running [43498]
e1 vcplatformagent-3.5.4	platform.agent	vcp	
47 volttroncentralagent-3.5.5	voltttron.central	vc	

See [Agent Creation Walk-through](#) for further details on installing and starting agents from `vctl`.

Once the Message Debugger Agent is running, it begins capturing message data and writing it to a SQLite database.

## Message Viewer

The Message Viewer is a separate process that interacts with the Message Debugger Agent primarily via VOLTTTRON RPC calls. These calls allow it to request and report on filtered sets of message data.

Since the Agent's RPC methods are available for use by any VOLTTTRON agent, the Message Viewer is really just one example of a Message Debugger information consumer. Other viewers could be created to satisfy a variety of specific debugging needs. For example, a viewer could support browser-based message debugging with a graphical user interface, or a viewer could transform message data into PCAP format for consumption by WireShark.

The Message Viewer in `services/ops/MessageDebuggerAgent/messageviewer/viewer.py` implements a command-line UI, subclassing Python's `Cmd` class. Most of the command-line options that it displays result in a MessageDebugger-Agent RPC request. The Message Viewer formats and displays the results.

In Linux, the Message Viewer can be started as follows, and displays the following menu:

```
(voltttron) $ cd services/ops/MessageDebuggerAgent/messageviewer
(voltttron) $ python viewer.py
Welcome to the MessageViewer command line. Supported commands include:
    display_message_stream
    display_messages
    display_exchanges
    display_exchange_details
    display_session_details_by_agent <session_id>
    display_session_details_by_topic <session_id>

    list_sessions
    set_verbosity <level>
    list_filters
```

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```

set_filter <filter_name> <value>
clear_filters
clear_filter <filter_name>

start_streaming
stop_streaming
start_session
stop_session
delete_session <session_id>
delete_database

help
quit
Please enter a command.
Viewer>

```

## Command-Line Help

The Message Viewer offers two help levels. Simply typing `help` gives a list of available commands. If a command name is provided as an argument, advice is offered on how to use that command:

```

Viewer> help

Documented commands (type help <topic>):
=====
clear_filter          display_messages      set_filter
clear_filters         display_session_details_by_agent  set_verbosity
delete_database       display_session_details_by_topic  start_session
delete_session        help                  start_streaming
display_exchange_details  list_filters          stop_session
display_exchanges      list_sessions         stop_streaming
display_message_stream  quit

Viewer> help set_filter

    Set a filter to a value; syntax is: set_filter <filter_name> <value>

    Some recognized filters include:
    . freq <n>: Use a single-line display, refreshing every <n> seconds (<n>
↳can be floating point)
    . session_id <n>: Display Messages and Exchanges for the indicated
↳debugging session ID only
    . results_only <n>: Display Messages and Exchanges only if they have a
↳result
    . sender <agent_name>
    . recipient <agent_name>
    . device <device_name>
    . point <point_name>
    . topic <topic_name>: Matches all topics that start with the supplied
↳<topic_name>
    . starttime <YYYY-MM-DD HH:MM:SS>: Matches rows with timestamps after the
↳supplied time
    . endtime <YYYY-MM-DD HH:MM:SS>: Matches rows with timestamps before the
↳supplied time
    . (etc. -- see the structures of DebugMessage and DebugMessageExchange)

```

## Debug Sessions

The Message Debugger Agent tags each message with a debug session ID (a serial number), which groups a set of messages that are bounded by a start time and an end time. The `list_sessions` command describes each session in the database:

```
Viewer> list_sessions
```

rowid	start_time	end_time	num_messages
1	2017-03-20 17:07:13.867951	-	2243
2	2017-03-20 17:17:35.725224	-	1320
3	2017-03-20 17:33:35.103204	2017-03-20 17:46:15.657487	12388

A new session is started by default when the Agent is started. After that, the `stop_session` and `start_session` commands can be used to create new session boundaries. If the Agent is running but no session is active (i.e., because `stop_session` was used to stop it), messages are still written to the database, but they have no session ID.

## Filtered Display

The `set_filter <property> <value>` command enables filtered display of messages. A variety of properties can be filtered.

In the following example, message filters are defined by `session_id` and `sender`, and the `display_messages` command displays the results:

```
Viewer> set_filter session_id 4
Set filters to {'session_id': '4'}
Viewer> set_filter sender testagent
Set filters to {'sender': 'testagent', 'session_id': '4'}
Viewer> display_messages
```

timestamp	direction	sender	recipient	request_id	
	subsystem	method	topic	device	
↪point	result				
11:51:00	incoming	testagent	messageviewer.connection	-	
↪	RPC	pubsub.sync	-	-	
↪	-				
11:51:00	outgoing	testagent	pubsub	-	
↪	RPC	pubsub.push	-	-	
↪	-				
11:51:00	incoming	testagent	platform.driver		
↪1197886248649056372.284581685	RPC		get_point	-	
↪ chargepoint1 Status		-			
11:51:01	outgoing	testagent	platform.driver		
↪1197886248649056372.284581685	RPC		-	-	
↪ -	-	AVAILABLE			
11:51:01	incoming	testagent	pubsub		
↪1197886248649056373.284581649	RPC		pubsub.publish	test_topic/test_	
↪subtopic	-	-	-		
11:51:01	outgoing	testagent	pubsub		
↪1197886248649056373.284581649	RPC		-	-	
↪ -	-	None			

## Debug Message Exchanges

A VOLTTRON message's request ID is not unique to a single message. A group of messages in an “exchange” (essentially a small conversation among agents) will often share a common request ID, for instance during RPC request/response exchanges.

The following example uses the same filters as above, and then uses `display_exchanges` to display a single line for each message exchange, reducing the number of displayed rows from 6 to 2. Note that not all messages have a request ID; messages with no ID are absent from the responses to exchange queries.

```
Viewer> list_filters
{'sender': 'testagent', 'session_id': '4'}
Viewer> display_exchanges
  sender      recipient      sender_time  topic      device
↪point      result
  testagent   platform.driver  11:51:00    -          chargepoint1
↪Status     AVAILABLE
  testagent   pubsub          11:51:01    test_topic/test_subtopic -          -
↪          None
```

## Special Filters

Most filters that can be set with the `set_filter` command are simple string matches on one or another property of a message. Some filters have special characteristics, though. The `set_filter starttime <timestamp>` and `set_filter endtime <timestamp>` filters are inequalities that test for messages after a start time or before an end time.

In the following example, note the use of quotes in the endtime value supplied to `set_filter`. Any filter value can be delimited with quotes. Quotes must be used when a value contains embedded spaces, as is the case here:

```
Viewer> list_sessions
  rowid      start_time      end_time      num_messages
  1          2017-03-20 17:07:13.867951 -          -
  2          2017-03-20 17:17:35.725224 -          -
  3          2017-03-21 11:48:33.803288 2017-03-21 11:50:57.181136 6436
  4          2017-03-21 11:50:59.656693 2017-03-21 11:51:05.934895 450
  5          2017-03-21 11:51:08.431871 -          74872
  6          2017-03-21 12:17:30.568260 -          2331
Viewer> set_filter session_id 5
Set filters to {'session_id': '5'}
Viewer> set_filter sender testagent
Set filters to {'sender': 'testagent', 'session_id': '5'}
Viewer> set_filter endtime '2017-03-21 11:51:30'
Set filters to {'endtime': '2017-03-21 11:51:30', 'sender': 'testagent', 'session_id': '5'}
Viewer> display_exchanges
  sender      recipient      sender_time  topic      device
↪point      result
  testagent   platform.driver  11:51:11    -          chargepoint1
↪Status     AVAILABLE
  testagent   pubsub          11:51:11    test_topic/test_subtopic -          -
↪          None
  testagent   platform.driver  11:51:25    -          chargepoint1
↪Status     AVAILABLE
  testagent   pubsub          11:51:25    test_topic/test_subtopic -          -
↪          None
```

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testagent	platform.driver	11:51:26	-	chargepoint1	
↪Status	AVAILABLE				
testagent	pubsub	11:51:26	test_topic/test_subtopic	-	-
↪	None				

Another filter type with special behavior is `set_filter topic <name>`. Ordinarily, filters do an exact match on a message property. Since message topics are often expressed as hierarchical substrings, though, the `topic` filter does a substring match on the left edge of a message's topic, as in the following example:

```
Viewer> set_filter topic test_topic
Set filters to {'topic': 'test_topic', 'endtime': '2017-03-21 11:51:30', 'sender':
↪'testagent', 'session_id': '5'}
Viewer> display_exchanges
sender      recipient      sender_time  topic          device      point
↪result
testagent   pubsub          11:51:11     test_topic/test_subtopic -            -
↪None
testagent   pubsub          11:51:25     test_topic/test_subtopic -            -
↪None
testagent   pubsub          11:51:26     test_topic/test_subtopic -            -
↪None
Viewer>
```

Another filter type with special behavior is `set_filter results_only 1`. In the JSON representation of a response to an RPC call, for example an RPC call to a Platform Driver interface, the response to the RPC request typically appears as the value of a 'result' tag. The `results_only` filter matches only those messages that have a non-empty value for this tag.

In the following example, note that when the `results_only` filter is set, it is given a value of '1'. This is actually a meaningless value that gets ignored. It must be supplied because the `set_filter` command syntax requires that a value be supplied as a parameter.

In the following example, note the use of `clear_filter <property>` to remove a single named filter from the list of filters that are currently in effect. There is also a `clear_filters` command, which clears all current filters.

```
Viewer> clear_filter topic
Set filters to {'endtime': '2017-03-21 11:51:30', 'sender': 'testagent', 'session_id
↪': '5'}
Viewer> set_filter results_only 1
Set filters to {'endtime': '2017-03-21 11:51:30', 'sender': 'testagent', 'session_id
↪': '5', 'results_only': '1'}
Viewer> display_exchanges
sender      recipient      sender_time  topic          device      point
↪result
testagent   platform.driver 11:51:11     -              chargepoint1 Status
↪AVAILABLE
testagent   platform.driver 11:51:25     -              chargepoint1 Status
↪AVAILABLE
testagent   platform.driver 11:51:26     -              chargepoint1 Status
↪AVAILABLE
```

## Streamed Display

In addition to exposing a set of RPC calls that allow other agents (like the Message Viewer) to query the Message Debugger Agent's SQLite database of recent messages, the Agent can also publish messages in real time as it receives them.

This feature is disabled by default due to the large quantity of data that it might need to handle. When it is enabled, the Agent applies the filters currently in effect to each message as it is received, and re-publishes the transformed, ready-for-debugging message to a socket if it meets the filter criteria. The Message Viewer can listen on that socket and display the message stream as it arrives.

In the following `display_message_stream` example, the Message Viewer displays all messages sent by the agent named 'testagent', as they arrive. It continues to display messages until execution is interrupted with ctrl-C:

```
Viewer> clear_filters
Set filters to {}
Viewer> set_filter sender testagent
Set filters to {'sender': 'testagent'}
Viewer> display_message_stream
Streaming debug messages
  timestamp      direction      sender      recipient      request_id      subsystem      ↵
↪method          topic          device      point          result
12:28:58         outgoing      testagent   pubsub         -                RPC            ↵
↪pubsub.push     -                -           -              -
12:28:58         incoming      testagent   platform.dr    11978862486     RPC            get_
↪point          -                chargepoint Status      -              iver          49056826.28
↪                1
                4581713
12:28:58         outgoing      testagent   platform.dr    11978862486     RPC            -
↪                -                -                AVAILABLE
                iver          49056826.28
                4581713
12:28:58         incoming      testagent   pubsub         11978862486     RPC            ↵
↪pubsub.publ    test_topic/    -           -              -
                49056827.28
                ish
↪                test_subtop
                4581685
↪                ic
12:28:58         outgoing      testagent   pubsub         11978862486     RPC            -
↪                -                -                None
                49056827.28
                4581685
12:28:58         outgoing      testagent   pubsub         -                RPC            ↵
↪pubsub.push     -                -           -              -
^CViewer> stop_streaming
Stopped streaming debug messages
```

(Note the use of wrapping in the column formatting. Since these messages aren't known in advance, the Message Viewer has incomplete information about how wide to make each column. Instead, it must make guesses based on header widths, data widths in the first row received, and min/max values, and then wrap the data when it overflows the column boundaries.)

## Single-Line Display

Another filter with special behavior is `set_filter freq <seconds>`. This filter, which takes a number *N* as its value, displays only one row, the most recently captured row that satisfies the filter criteria. (Like other filters, this filter can be used with either `display_messages` or `display_exchanges`.) It then waits *N* seconds, reissues the query, and overwrites the old row with the new one. It continues this periodic single-line overwritten display until it is interrupted with `ctrl-C`:

```
Viewer> list_filters
{'sender': 'testagent'}
Viewer> set_filter freq 10
Set filters to {'freq': '10', 'sender': 'testagent'}
Viewer> display_exchanges
  sender      recipient      sender_time  topic                                device      point_
  ↪      result
  ↪ testagent      pubsub        12:31:28    test_topic/test_subtopic  -           -
  ↪      None
```

(Again, the data isn't known in advance, so the Message Viewer has to guess the best width of each column. In this single-line display format, data gets truncated if it doesn't fit, because no wrapping can be performed – only one display line is available.)

## Displaying Exchange Details

The `display_exchange_details <request_id>` command provides a way to get more specific details about an exchange, i.e. about all messages that share a common request ID. At low or medium verbosity, when this command is used (supplying the relevant request ID, which can be obtained from the output of other commands), it displays one row for each message:

```
Viewer> set_filter sender testagent
Set filters to {'sender': 'testagent', 'session_id': '4'}
Viewer> display_messages
  timestamp      direction      sender      recipient      request_id      device
  ↪      subsystem      method      topic
  ↪ point result
  ↪ 11:51:00 incoming testagent messageviewer.connection -
  ↪      RPC pubsub.sync - -
  ↪ 11:51:00 outgoing testagent pubsub -
  ↪      RPC pubsub.push - -
  ↪ 11:51:00 incoming testagent platform.driver
  ↪ 1197886248649056372.284581685 RPC get_point -
  ↪ chargepoint1 Status -
  ↪ 11:51:01 outgoing testagent platform.driver
  ↪ 1197886248649056372.284581685 RPC -
  ↪ - - AVAILABLE
  ↪ 11:51:01 incoming testagent pubsub
  ↪ 1197886248649056373.284581649 RPC pubsub.publish test_topic/test_
  ↪ subtopic - -
  ↪ 11:51:01 outgoing testagent pubsub
  ↪ 1197886248649056373.284581649 RPC -
  ↪ - - None
Viewer> display_exchange_details 1197886248649056373.284581649
  timestamp      direction      sender      recipient      request_id      device      point
  ↪ subsystem      method      topic
  ↪ result
```

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11:51:01	incoming	testagent	pubsub	1197886248649056373.284581649	↳
↳RPC	pubsub.publish	test_topic/test_subtopic	-	-	-
11:51:01	outgoing	testagent	pubsub	1197886248649056373.284581649	↳
↳RPC	-	-	-	-	↳
↳None					

At high verbosity, `display_exchange_details` switches display formats, showing all properties for each message in a json-like dictionary format:

```
Viewer> set_verbosity high
Set verbosity to high
Viewer> display_exchange_details 1197886248649056373.284581649

{
  "data": "{ \"params\": { \"topic\": \"test_topic/test_subtopic\", \"headers\": { \"Date\": \"2017-03-21T11:50:56.293830\", \"max_compatible_version\": \"\", \"min_compatible_version\": \"3.0\" }, \"message\": [ { \"property_1\": 1, \"property_2\": 2 }, { \"property_3\": 3, \"property_4\": 4 } ], \"bus\": \"\", \"jsonrpc\": \"2.0\", \"method\": \"pubsub.publish\", \"id\": \"15828311332408898779.284581649\" }, \"device\": \"\", \"direction\": \"incoming\", \"frame7\": \"\", \"frame8\": \"\", \"frame9\": \"\", \"headers\": { \"u'Date': u'2017-03-21T11:50:56.293830', u'max_compatible_version': u'', u'min_compatible_version': u'3.0' }, \"message\": [ { u'property_1': 1, u'property_2': 2 }, { u'property_3': 3, u'property_4': 4 } ], \"message_size\": 374, \"message_value\": { u'property_1': 1, u'property_2': 2 }, \"method\": \"pubsub.publish\", \"params\": { u'topic': u'test_topic/test_subtopic', u'headers': { u'Date': u'2017-03-21T11:50:56.293830', u'max_compatible_version': u'', u'min_compatible_version': u'3.0' }, u'message': [ { u'property_1': 1, u'property_2': 2 }, { u'property_3': 3, u'property_4': 4 } ], u'bus': u'' }, \"point\": \"\", \"point_value\": \"\", \"recipient\": \"pubsub\", \"request_id\": \"1197886248649056373.284581649\", \"result\": \"\", \"sender\": \"testagent\", \"session_id\": 4, \"subsystem\": \"RPC\", \"timestamp\": \"2017-03-21 11:51:01.027623\", \"topic\": \"test_topic/test_subtopic\", \"user_id\": \"\", \"vip_signature\": \"VIP1\" } }",
  "device": "",
  "direction": "incoming",
  "frame7": "",
  "frame8": "",
  "frame9": "",
  "headers": "{ 'Date': '2017-03-21T11:50:56.293830', 'max_compatible_version': '', 'min_compatible_version': '3.0', 'message': [ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ], 'bus': '', 'jsonrpc': '2.0', 'method': 'pubsub.publish', 'id': '15828311332408898779.284581649' },",
  "message": "[ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ]",
  "message_size": 374,
  "message_value": "{ 'property_1': 1, 'property_2': 2 }",
  "method": "pubsub.publish",
  "params": "{ 'topic': 'test_topic/test_subtopic', 'headers': { 'Date': '2017-03-21T11:50:56.293830', 'max_compatible_version': '', 'min_compatible_version': '3.0' }, 'message': [ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ], 'bus': '' }",
  "point": "",
  "point_value": "",
  "recipient": "pubsub",
  "request_id": "1197886248649056373.284581649",
  "result": "",
  "sender": "testagent",
  "session_id": 4,
  "subsystem": "RPC",
  "timestamp": "2017-03-21 11:51:01.027623",
  "topic": "test_topic/test_subtopic",
  "user_id": "",
  "vip_signature": "VIP1"
}

{
  "data": "{ \"params\": { \"topic\": \"test_topic/test_subtopic\", \"headers\": { \"Date\": \"2017-03-21T11:50:56.293830\", \"max_compatible_version\": \"\", \"min_compatible_version\": \"3.0\" }, \"message\": [ { \"property_1\": 1, \"property_2\": 2 }, { \"property_3\": 3, \"property_4\": 4 } ], \"bus\": \"\", \"jsonrpc\": \"2.0\", \"method\": \"pubsub.publish\", \"id\": \"15828311332408898779.284581649\" }, \"device\": \"\",",
  "device": "",
  "direction": "incoming",
  "frame7": "",
  "frame8": "",
  "frame9": "",
  "headers": "{ 'Date': '2017-03-21T11:50:56.293830', 'max_compatible_version': '', 'min_compatible_version': '3.0', 'message': [ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ], 'bus': '', 'jsonrpc': '2.0', 'method': 'pubsub.publish', 'id': '15828311332408898779.284581649' },",
  "message": "[ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ]",
  "message_size": 374,
  "message_value": "{ 'property_1': 1, 'property_2': 2 }",
  "method": "pubsub.publish",
  "params": "{ 'topic': 'test_topic/test_subtopic', 'headers': { 'Date': '2017-03-21T11:50:56.293830', 'max_compatible_version': '', 'min_compatible_version': '3.0' }, 'message': [ { 'property_1': 1, 'property_2': 2 }, { 'property_3': 3, 'property_4': 4 } ], 'bus': '' }",
  "point": "",
  "point_value": "",
  "recipient": "pubsub",
  "request_id": "1197886248649056373.284581649",
  "result": "",
  "sender": "testagent",
  "session_id": 4,
  "subsystem": "RPC",
  "timestamp": "2017-03-21 11:51:01.027623",
  "topic": "test_topic/test_subtopic",
  "user_id": "",
  "vip_signature": "VIP1"
}
```

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```

    "direction": "outgoing",
    "frame7": "",
    "frame8": "",
    "frame9": "",
    "headers": "{u'Date': u'2017-03-21T11:50:56.293830', u'max_compatible_version': u'
↪', u'min_compatible_version': u'3.0'}",
    "message": "[{u'property_1': 1, u'property_2': 2}, {u'property_3': 3, u'property_4
↪': 4}]",
    "message_size": 383,
    "message_value": "{u'property_1': 1, u'property_2': 2}",
    "method": "pubsub.publish",
    "params": "{u'topic': u'test_topic/test_subtopic', u'headers': {u'Date': u'2017-
↪03-21T11:50:56.293830', u'max_compatible_version': u'', u'min_compatible_version': u
↪'3.0'}, u'message': [{u'property_1': 1, u'property_2': 2}, {u'property_3': 3, u
↪'property_4': 4}], u'bus': u''}",
    "point": "",
    "point_value": "",
    "recipient": "testagent",
    "request_id": "1197886248649056373.284581649",
    "result": "",
    "sender": "pubsub",
    "session_id": 4,
    "subsystem": "RPC",
    "timestamp": "2017-03-21 11:51:01.031183",
    "topic": "test_topic/test_subtopic",
    "user_id": "testagent",
    "vip_signature": "VIP1"
}

```

## Verbosity

As mentioned in the previous section, Agent and Viewer behavior can be adjusted by changing the current verbosity with the `set_verbosity <level>` command. The default verbosity is low. low, medium and high levels are available:

```

Viewer> set_verbosity high
Set verbosity to high
Viewer> set_verbosity none
Invalid verbosity choice none; valid choices are ['low', 'medium', 'high']

```

At high verbosity, the following query formatting rules are in effect:

- When displaying timestamps, display the full date and time (including microseconds), not just HH:MM:SS.
- In responses to `display_message_exchanges`, use dictionary format (see example in previous section).
- Display all columns, not just “interesting” columns (see the list below).
- Don’t exclude messages/exchanges based on excluded senders/receivers (see the list below).

At medium or low verbosity:

- When displaying timestamps, display HH:MM:SS only.
- In responses to `display_message_exchanges`, use table format.
- Display “interesting” columns only (see the list below).
- Exclude messages/exchanges for certain senders/receivers (see the list below).

At low verbosity:

- If > 1000 objects are returned by a query, display the count only.

The following “interesting” columns are displayed at low and medium verbosity levels (at high verbosity levels, all properties are displayed):

Debug Message	Debug Message Exchange	Debug Session
timestamp	sender_time	rowid
direction		start_time
sender	sender	end_time
recipient	recipient	num_messages
request_id		
subsystem		
method		
topic	topic	
device	device	
point	point	
result	result	

Messages from the following senders, or to the following receivers, are excluded at low and medium verbosity levels:

Sender	Receiver
(empty)	(empty)
<b>None</b>	
control	control
config.store	config.store
pubsub	
control.connection	
messageviewer.connection	
platform.messagedebugger	
platform.messagedebugger.loopback_rpc	

These choices about which columns are “interesting” and which senders/receivers are excluded are defined as parameters in Message Viewer, and can be adjusted as necessary by changing global value lists in viewer.py.

## Session Statistics

One useful tactic for starting at a summary level and drilling down is to capture a set of messages for a session and then examine the counts of sending and receiving agents, or sending agents and topics. This gives hints on which values might serve as useful filters for more specific queries.

The `display_session_details_by_agent <session_id>` command displays statistics by sending and receiving agent. Sending agents are table columns, and receiving agents are table rows. This query also applies whatever filters are currently in effect; the filters can reduce the counts and can also reduce the number of columns and rows.

The following example shows the command being used to list all senders and receivers for messages sent during debug session 7:

```
Viewer> list_sessions
```

rowid	start_time	end_time	num_messages
1	2017-03-20 17:07:13.867951	-	-
2	2017-03-20 17:17:35.725224	-	-
3	2017-03-21 11:48:33.803288	2017-03-21 11:50:57.181136	6436

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```

4      2017-03-21 11:50:59.656693 2017-03-21 11:51:05.934895 450
5      2017-03-21 11:51:08.431871 - 74872
6      2017-03-21 12:17:30.568260 2017-03-21 12:38:29.070000 60384
7      2017-03-21 12:38:31.617099 2017-03-21 12:39:53.174712 3966
Viewer> clear_filters
Set filters to {}
Viewer> display_session_details_by_agent 7

```

Receiving Agent	control	listener	messageviewer.connection	
platform.driver	platform.messagedebugger	pubsub	testagent	
(No Receiving Agent)	-	-	-	2
control	-	-	-	-
listener	-	2	-	-
messageviewer.connection	-	679	-	-
platform.driver	-	-	-	-
platform.messagedebugger	-	1249	16	3
pubsub	2	679	-	-
testagent	-	4	31	-
	-	31	-	-

The `display_session_details_by_topic <session_id>` command is similar to `display_session_details_by_agent`, but each row contains statistics for a topic instead of for a receiving agent:

```

Viewer> display_session_details_by_topic 7

```

Topic	control	listener	messageviewer.	
connection	platform.driver	platform.messagedebugger	pubsub	testagent
(No Topic)	1	664	-	-
5	3	1314	39	-
devices/chargepoint1/Address	-	-	-	-
devices/chargepoint1/City	-	6	-	-
devices/chargepoint1/Connector	-	6	-	-
devices/chargepoint1/Country	-	5	-	-
devices/chargepoint1/Current	-	5	-	-
devices/chargepoint1/Description	-	6	-	-
devices/chargepoint1/Energy	-	6	-	-
devices/chargepoint1/Lat	-	5	-	-
devices/chargepoint1/Level	-	6	-	-
devices/chargepoint1/Long	-	5	-	-
devices/chargepoint1/Mode	-	6	-	-
	5	5	-	-

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devices/chargepoint1/Power	-	-	-	-
↪ - 6	-	6	-	⌋
devices/chargepoint1/Reservable	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/State	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/Status	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/Status.TimeSta	-	-	-	⌋
↪ - 6	-	6	-	⌋
mp				
devices/chargepoint1/Type	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/Voltage	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/alarmTime	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/alarmType	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/all	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/allowedLoad	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/clearAlarms	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/currencyCode	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/driverAccountN	-	-	-	⌋
↪ - 5	-	5	-	⌋
umber				
devices/chargepoint1/driverName	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/endTime	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/mainPhone	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/maxPrice	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/minPrice	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/numPorts	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/orgID	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/organizationNa	-	-	-	⌋
↪ - 5	-	5	-	⌋
me				
devices/chargepoint1/percentShed	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/portLoad	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/portNumber	-	-	-	⌋
↪ - 6	-	6	-	⌋
devices/chargepoint1/sessionID	-	-	-	⌋
↪ - 5	-	5	-	⌋
devices/chargepoint1/sessionTime	-	-	-	⌋
↪ - 6	-	6	-	⌋

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devices/chargepoint1/sgID	-	-	-	-
↪ -	6	-	6	-
devices/chargepoint1/sgName	-	-	-	-
↪ -	6	-	6	-
devices/chargepoint1/shedState	-	-	-	-
↪ -	5	-	5	-
devices/chargepoint1/startTime	-	-	-	-
↪ -	6	-	6	-
devices/chargepoint1/stationID	-	-	-	-
↪ -	5	-	5	-
devices/chargepoint1/stationMacAddr	-	-	-	-
↪ -	6	-	6	-
devices/chargepoint1/stationManufac	-	-	-	-
↪ -	5	-	5	-
turer	-	-	-	-
devices/chargepoint1/stationModel	-	-	-	-
↪ -	6	-	6	-
devices/chargepoint1/stationName	-	-	-	-
↪ -	5	-	5	-
devices/chargepoint1/stationRightsP	-	-	-	-
↪ -	6	-	6	-
rofile	-	-	-	-
devices/chargepoint1/stationSerialN	-	-	-	-
↪ -	6	-	6	-
um	-	-	-	-
heartbeat/control	1	-	-	-
↪ -	-	-	1	-
heartbeat/listener	-	-	15	-
↪ -	-	-	15	-
heartbeat/platform.driver	-	-	-	-
↪ -	1	-	1	-
heartbeat/pubsub	-	-	-	-
↪ -	-	-	2	-
test_topic/test_subtopic	-	-	-	-
↪ -	-	-	8	8

## Database Administration

The Message Debugger Agent stores message data in a SQLite database's DebugMessage, DebugMessageExchange and DebugSession tables. If the database isn't present already when the Agent is started, it is created automatically.

The SQLite database can consume a lot of disk space in a relatively short time, so the Message Viewer has command-line options that recover that space by deleting the database or by deleting all messages belonging to a given debug session.

The `delete_session <session_id>` command deletes the database's DebugSession row with the indicated ID, and also deletes all DebugMessage and DebugMessageExchange rows with that session ID. In the following example, `delete_session` deletes the 60,000 DebugMessages that were captured during a 20-minute period as session 6:

```
Viewer> list_sessions
rowid      start_time          end_time            num_messages
1          2017-03-20 17:07:13.867951 - -
2          2017-03-20 17:17:35.725224 - -
3          2017-03-21 11:48:33.803288 2017-03-21 11:50:57.181136 6436
```

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4	2017-03-21 11:50:59.656693	2017-03-21 11:51:05.934895	450
5	2017-03-21 11:51:08.431871	-	74872
6	2017-03-21 12:17:30.568260	2017-03-21 12:38:29.070000	60384
7	2017-03-21 12:38:31.617099	2017-03-21 12:39:53.174712	3966
8	2017-03-21 12:42:08.482936	-	3427

```
Viewer> delete_session 6
Deleted debug session 6
Viewer> list_sessions
```

rowid	start_time	end_time	num_messages
1	2017-03-20 17:07:13.867951	-	-
2	2017-03-20 17:17:35.725224	-	-
3	2017-03-21 11:48:33.803288	2017-03-21 11:50:57.181136	6436
4	2017-03-21 11:50:59.656693	2017-03-21 11:51:05.934895	450
5	2017-03-21 11:51:08.431871	-	74872
7	2017-03-21 12:38:31.617099	2017-03-21 12:39:53.174712	3966
8	2017-03-21 12:42:08.482936	-	4370

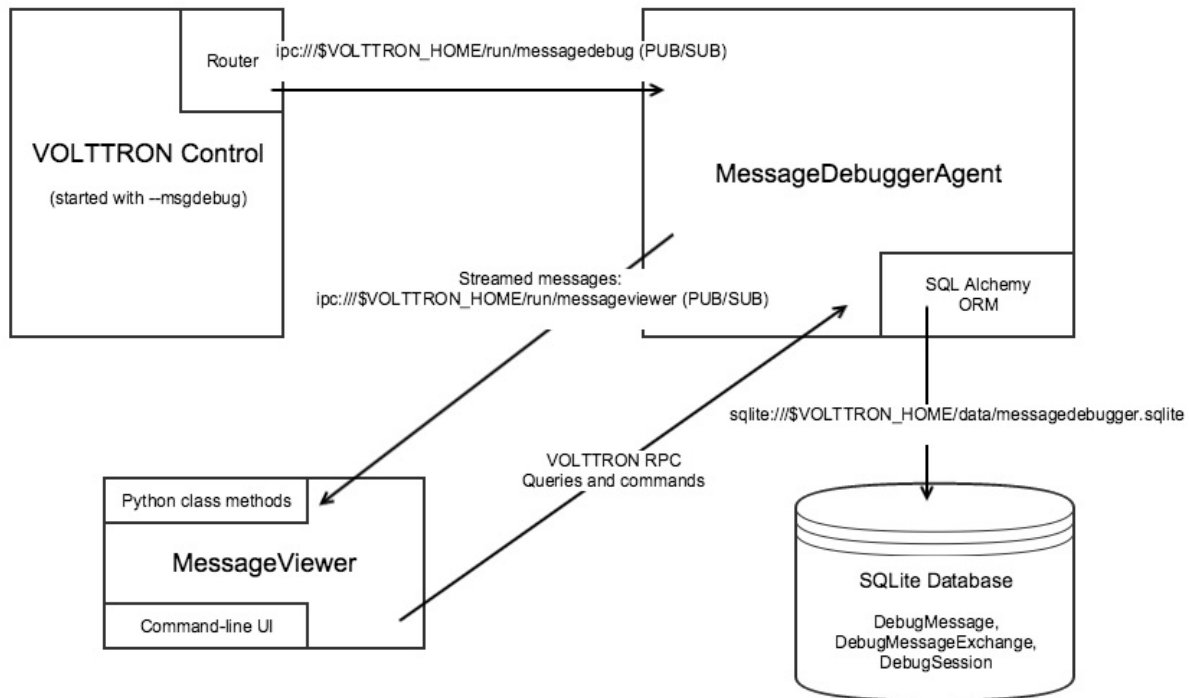
The `delete_database` command deletes the entire SQLite database, removing all records of previously-captured `DebugMessages`, `DebugMessageExchanges` and `DebugSessions`. The database will be re-created the next time a debug session is started.

```
Viewer> delete_database
Database deleted
Viewer> list_sessions
No query results
Viewer> start_session
Message debugger session 1 started
Viewer> list_sessions
```

rowid	start_time	end_time	num_messages
1	2017-03-22 12:39:40.320252	-	180

It's recommended that the database be deleted if changes are made to the `DebugMessage`, `DebugMessageExchange` or `DebugSession` object structures that are defined in `agent.py`. A skew between these data structures in Python code vs. the ones in the database can cause instability in the Message Debugger Agent, perhaps causing it to fail. If a failure of this kind prevents use of the Message Viewer's `delete_database` command, the database can be deleted directly from the filesystem. By default, it is located in `$VOLTTRON_HOME`'s `run` directory.

## Implementation Details



**Router changes:** MessageDebuggerAgent reads and stores all messages that pass through the VIP router. This is accomplished by subscribing to the messages on a new socket published by the platform’s `Router.issue()` method.

**The “direction” property:** Most agent interactions result in at least two messages, an incoming request and an outgoing response. `Router.issue()` has a `topic` parameter with values `INCOMING`, `OUTGOING`, `ERROR` and `UNROUTABLE`. The publication on the socket that happens in `issue()` includes this “issue topic” (not to be confused with a message’s `topic`) along with each message. MessageDebuggerAgent records it as a `DebugMessage` property called `direction`, since its value for almost all messages is either `INCOMING` or `OUTGOING`.

**SQLite Database and SQL Alchemy:** MessageDebuggerAgent records each message as a `DebugMessage` row in a relational database. SQLite is used since it’s packaged with Python and is already being used by other VOLTRON agents. Database semantics are kept simple through the use of a SQL Alchemy object-relational mapping framework. Python’s “SQLAlchemy” plug-in must be loaded in order for MessageDebuggerAgent to run.

**Calling MessageViewer Directly:** The `viewer.py` module that starts the Message Viewer command line also contains a `MessageViewer` class. It exposes class methods which can be used to make direct Python calls that, in turn, make Message Debugger Agent’s RPC calls. The MessageViewer class-method API includes the following calls:

- `delete_debugging_db()`
- `delete_debugging_session(session_id)`
- `disable_message_debugging()`
- `display_db_objects(db_object_name, filters=None)`
- `display_message_stream()`
- `enable_message_debugging()`
- `message_exchange_details(message_id)`

- `session_details_by_agent(session_id)`
- `session_details_by_topic(session_id)`
- `set_filters(filters)`
- `set_verbosity(verbosity_level)`
- `start_streaming(filters=None)`
- `stop_streaming()`

The command-line UI's `display_messages` and `display_exchanges` commands are implemented here as `display_db_objects('DebugMessage')` and `display_db_objects(DebugMessageExchange)`. These calls return json-encoded representations of `DebugMessages` and `DebugMessageExchanges`, which are formatted for display by `MessageViewerCmd`.

**MessageViewer connection:** `MessageViewer` is not actually a VOLTTRON agent. In order for it make `MessageDebuggerAgent` RPC calls, which are agent-agent interactions, it builds a “connection” that manages a temporary agent. This is a standard VOLTTRON pattern that is also used, for instance, by `Volttron Central`.

View the [message debugging specification](#) for more information on the message debugging implementation for ZeroMQ.

## Message Bus Debugging Specification

NOTE: This is a planning document, created prior to implementation of the VOLTTRON Message Debugger. It describes the tool's general goals, but it's not always accurate about specifics of the ultimate implementation. For a description of Message Debugging as implemented, with advice on how to configure and use it, please see [Message-Debugging](#).

### Description

VOLTTRON agents send messages to each other on the VOLTTRON message bus. It can be useful to examine the contents of this message stream while debugging and troubleshooting agents and drivers.

In satisfaction of this specification, a new Message Monitor capability will be implemented allowing VOLTTRON agent/driver developers to monitor the message stream, filter it for an interesting set of messages, and display the contents and characteristics of each message.

Some elements below are central to this effort (required), while others are useful improvements (optional) that may be implemented if time permits.

### Feature: Capture Messages and Display a Message Summary

When enabled, the Message Monitor will capture details about a stream of routed messages. On demand, it will display a message summary, either in real time as the messages are routed, or retrospectively.

A summary view will convey the high level interactions occurring between VOLTTRON agents as conversations that may be expanded for more detail. A simple RPC call that involves 4 message send/recv segments will be displayed as a single object that can be expanded. In this way, the message viewer will provide a higher-level view of message bus activity than might be gleaned from verbose logs using `grep`.

Pub/sub interactions will be summarized at the topic level with high-level statistics such as the number of subscribers, # of messages published during the capture period, etc. Drilling into the interaction might show the last message published with the ability to drill deeper into individual messages. A diff display would show how the published data is changing.

## Summary view

```
- 11:09:31.0831   RPC      set_point      charge.control  platform.driver
| - params: ('set_load', 10)   return: True
- 11:09:31.5235   Pub/Sub   devices/my_device  platform.driver    2 subscribers
| - Subscriber: charge.control
  | - Last message 11:09:31.1104:
    [
      {
        'Heartbeat': True,
        'PowerState': 0,
        'temperature': 50.0,
        'ValveState': 0
      },
      ...
    ]
  | - Diff to 11:09:21.5431:
      'temperature': 48.7,
```

The summary's contents and format will vary by message subsystem.

RPC request/response pairs will be displayed on a single line:

```
(volttron) dl:volttron myname$ msmon --agent='(Agent1,Agent2) '

Agent1                                     Agent2
2016-11-22T11:09:31.083121+00:00 rpc: devices/my_topic; 2340972387; sent      2016-11-
↪22T11:09:31.277933+00:00 responded: 0.194 sec
2016-11-22T11:09:32.005938+00:00 rpc: devices/my_topic; 2340972388; sent      2016-11-
↪22T11:09:32.282193+00:00 responded: 0.277 sec
2016-11-22T11:09:33.081873+00:00 rpc: devices/my_topic; 2340972389; sent      2016-11-
↪22T11:09:33.271199+00:00 responded: 0.190 sec
2016-11-22T11:09:34.049139+00:00 rpc: devices/my_topic; 2340972390; sent      2016-11-
↪22T11:09:34.285393+00:00 responded: 0.236 sec
2016-11-22T11:09:35.053183+00:00 rpc: devices/my_topic; 2340972391; sent      2016-11-
↪22T11:09:35.279317+00:00 responded: 0.226 sec
2016-11-22T11:09:36.133948+00:00 rpc: devices/my_topic; 2340972392; sent      2016-11-
↪22T11:09:36.133003+00:00 dequeued
```

When PubSub messages are displayed, each message's summary will include its count of subscribers:

```
(volttron) dl:volttron myname$ msmon --agent=(Agent1)

Agent1
2016-11-22T11:09:31.083121+00:00 pubsub: devices/my_topic; 2340972487; sent; 2 subs
2016-11-22T11:09:32.005938+00:00 pubsub: devices/my_topic; 2340972488; sent; 2 subs
2016-11-22T11:09:33.081873+00:00 pubsub: devices/my_topic; 2340972489; sent; 2 subs
2016-11-22T11:09:34.049139+00:00 pubsub: devices/my_topic; 2340972490; sent; 2 subs
2016-11-22T11:09:35.053183+00:00 pubsub: devices/my_topic; 2340972491; sent; 2 subs
```

While streaming output of a message summary, a defined keystroke sequence will “pause” the output, and another keystroke sequence will “resume” displaying the stream.

## Feature: Capture and Display Message Details

The Message Monitor will capture a variety of details about each message, including:

1. Sending agent ID
2. Receiving agent ID
3. User ID
4. Message ID
5. Subsystem
6. Topic
7. Message data
8. Message lifecycle timestamps, in UTC (when sent, dequeued, responded)
9. Message status (sent, responded, error, timeout)
10. Message size
11. Other message properties TBD (e.g., queue depth?)

On demand, it will display these details for a single message ID:

```
(volttron)d1:volttron myname$ msmon --id='2340972390'
```

```
2016-11-22T11:09:31.053183+00:00 (Agent1)
```

```
INFO:
```

```
  Subsystem: 'pubsub',
  Sender: 'Agent1',
  Topic: 'devices/my_topic',
  ID: '2340972390',
  Sent: '2016-11-22T11:09:31.004986+00:00',
  Message:
  [
    {
      'Heartbeat': True,
      'PowerState': 0,
      'temperature': 50.0,
      'ValveState': 0
    },
    {
      'Heartbeat':
      {
        'units': 'On/Off',
        'type': 'integer'
      },
      'PowerState':
      {
        'units': '1/0',
        'type': 'integer'
      },
      'temperature':
      {
        'units': 'Fahrenheit',
        'type': 'integer'
      },
      'ValveState':
```

(continues on next page)

(continued from previous page)

```

        {
            'units': '1/0',
            'type': 'integer'
        }
    ]

```

A VOLTRON message ID is not unique to a single message. A group of messages in a “conversation” may share a common ID, for instance during RPC request/response exchanges. When detailed display of all messages for a single message ID is requested, they will be displayed in chronological order.

### Feature: Display Message Statistics

Statistics about the message stream will also be available on demand:

1. Number of messages sent, by agent, subsystem, topic
2. Number of messages received, by agent, subsystem, topic

### Feature: Filter the Message Stream

The Message Monitor will be able to filter the message stream display to show only those messages that match a given set of criteria:

1. Sending agent ID(s)
2. Receiving agent ID(s)
3. User ID(s)
4. Subsystem(s)
5. Topic - Specific topic(s)
6. Topic - Prefix(es)
7. Specific data value(s)
8. Sampling start/stop time
9. Other filters TBD

### User Interface: Linux Command Line

A Linux command-line interface will enable the following user actions:

1. Enable message tracing
2. Disable message tracing
3. Define message filters
4. Define verbosity of displayed-message output
5. Display message stream
6. Begin recording messages
7. Stop recording messages

8. Display recorded messages
9. Play back (re-send) recorded messages

### **Feature (not implemented): Watch Most Recent**

Optionally, the Message Monitor can be asked to “watch” a specific data element. In that case, it will display the value of that element in the most recent message matching the filters currently in effect. As the data to be displayed changes, the display will be updated in place without scrolling (similar to “top” output):

```
(volttron) dl:volttron myname$ msmon --agent='(Agent1)' --watch='temperature'
Agent1
2016-11-22T11:09:31.053183+00:00 pubsub: my_topic; 2340972487; sent; 2 subs; ↵
↵temperature=50
```

### **Feature (not implemented): Regular Expression Support**

It could help for the Message Monitor’s filtering logic to support regular expressions. Regex support has also been requested (Issue #207) when identifying a subscribed pub/sub topic during VOLTTRON message routing.

Optionally, regex support will be implemented in Message Monitor filtering criteria, and also (configurably) during VOLTTRON topic matching.

### **Feature (not implemented): Message Stream Record and Playback**

The Message Monitor will be able to “record” and “play back” a message sequence:

1. Capture a set of messages as a single “recording”
2. Inspect the contents of the “recording”
3. “Play back” the recording – re-send the recording’s message sequence in VOLTTRON

### **Feature (not implemented): On-the-fly Message Inspection and Modification**

VOLTTRON message inspection and modification, on-the-fly, may be supported from the command line. The syntax and implementation would be similar to pdb (Python Debugger), and might be written as an extension to pdb.

Capabilities:

1. Drill-down inspection of message contents.
2. Set a breakpoint based on message properties, halting upon routing a matching message.
3. While halted on a breakpoint, alter a message’s contents.



### Feature (not implemented): PyCharm Debugging Plugin

VOLTTRON message debugging may also be published as a PyCharm plugin. The plugin would form a more user-friendly interface for the same set of capabilities described above – on-the-fly message inspection and modification, with the ability to set a breakpoint based on message properties.

### User Interface (not implemented): PCAP/Wireshark

Optionally, we may elect to render the message trace as a stream of PCAP data, thereby exploiting Wireshark's filtering and display capabilities. This would be in accord with the enhancement suggested in VOLTTRON Issue #260.

### User Interface (not implemented): Volttron Central Dashboard Widget

Optionally, the Message Monitor will be integrated as a new Volttron Central dashboard widget, supporting each of the following:

1. Enable/Disable the monitor
2. Filter messages
3. Configure message display details
4. Record/playback messages

### User Interface (not implemented): Graphical Display of Message Sequence

Optionally, the Volttron Central dashboard widget will provide graphical display of message sequences, allowing enhanced visualization of request/response patterns.

### Related Development: PyCharm Documentation

Also included in this effort will be a contribution to VOLTTRON documentation about installing and configuring a PyCharm environment for developing, debugging and testing VOLTTRON agents and drivers.

## Engineering Design Notes

### Grabbing Messages Off the Bus

This tool depends on reading and storing all messages that pass through the VIP router. The Router class already has hooks that allow for the capturing of messages at various points in the routing workflow. The BaseRouter abstract class defines `issue(self, topic, frames, extra)`. This method is called from `BaseRouter.route` and `BaseRouter._send` during the routing of messages. The `topic` parameter (not to be confused with a message topic found in `frames`) identifies the point or state in the routing workflow at which the issue was called.

The defined `topics` are: INCOMING, OUTGOING, ERROR and UNROUTABLE. Most messages will result in two calls, one with the INCOMING topic as the message enters the router and one with the OUTGOING topic as the message is sent on to its destination. Messages without a recipient are intended for the router itself and do not result in an OUTGOING call to `issue`.

`Router.issue` contains the concrete implementation of the method. It does two things:

1. It writes the topic, frames and optional extra parameters to the logger using the FramesFormatter.

2. It invokes `self._tracker.hit(topic, frames, extra)`. The Tracker class collects statistics by topic and counts the messages within a topic by peer, user and subsystem.

The issue method can be modified to optionally publish the `issue` messages to an in-process ZMQ address that the message-viewing tool will subscribe to. This will minimize changes to core VOLTTRON code and minimize the impact of processing these messages for debugging.

## Message Processor

The message processor will subscribe to messages coming out of the `Router.issue()` method and process these messages based on the current message viewer configuration. Messages will be written to a SQLite db since this is packaged with Python and currently used by other VOLTTRON agents.

## Message Viewer

The message viewer will display messages from the SQLite db. We need to consider whether it should also subscribe to receiving messages in real-time. The viewer will be responsible for displaying message statistics and will provide a command line interface to filter and display messages.

## Message Db Schema

```
message(id, created_on, issue_topic, extras, sender, recipient, user_id, msg_id, ↵
↵ subsystem, data)
```

`msg_id` will be used to associate pairs of incoming/outgoing messages.

---

**Note:** `data` will be a jsonified list of frames, alternatively we could add a `message_data` table with one row per frame.

---

A session table will track the start and end of a debug session and, at the end of a session, record statistics on the messages in the session.

```
session(id, created_on, name, start_time, end_time, num_messages)
```

The command line tool will allow users to delete old sessions and select a session for review/playback.

### 2.11.5 System Monitoring Agent

The System Monitoring Agent (colloquially “SysMon”) can be installed on the platform to monitor various system resource metrics, including percent CPU utilization, percent system memory (RAM) utilization, and percent storage (disk) utilization based on disk path.

## Configuration

The SysMon agent configuration includes options for setting the base publish topic as well as intervals in seconds for checking the various system resource utilization levels.

```
{
  "base_topic": "datalogger/log/platform",
  "cpu_check_interval": 5,
  "memory_check_interval": 5,
  "disk_check_interval": 5,
  "disk_path": "/"
}
```

The base topic will be formatted with the name of the function call used to determine the utilization percentage for the resource. For example, using the configuration above, the topic for cpu utilization would be “datalogger/log/platform/cpu\_percent”.

The disk path string can be set to specify the full path to a specific system data storage “disk”. Currently the SysMon agent supports configuration for only a single disk at a time.

## Periodic Publish

At the interval specified by the configuration option for each resource, the agent will automatically query the system for the resource utilization statistics and publish it to the message bus using the topic as previously described. The message content for each publish will contain only a single numeric value for that specific topic. Currently “scrape\_all” style publishes are not supported.

Example Publishes:

```
2020-03-10 11:20:33,755 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
↳Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/cpu_percent,
↳Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
4.8
2020-03-10 11:20:33,804 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
↳Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/memory_percent,
↳Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
35.6
2020-03-10 11:20:33,809 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
↳Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/disk_percent,
↳Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
```

## JSON RPC Methods

The VIP subsystem developed for the VOLTTRON message bus supports remote procedure calls (RPC), which can be used to more directly fetch data from the SysMon agent. Examples are provided below for each RPC call.

```
# Get Percent CPU Utilization
self.vip.rpc.call(PLATFORM.SYSMON, "cpu_percent").get()

# Get Percent System Memory Utilization
self.vip.rpc.call(PLATFORM.SYSMON, "memory_percent").get()

# Get Percent Storage "disk" Utilization
self.vip.rpc.call(PLATFORM.SYSMON, "disk_percent").get()
```

## 2.11.6 Threshold Detection Agent

The ThresholdDetectionAgent will publish an alert when a value published to a topic exceeds or falls below a configured value. The agent can be configured to watch topics are associated with a single value or to watch devices' all topics.

### Configuration

The Threshold Detection Agent supports the *config store* and can be configured with a file named “config”.

The file must be in the following format:

- Topics and points in device publishes may have maximum and minimum thresholds but both are not required
- A device's point entries are configured the same way as standard topic entries

```
{
  "topic": {
    "threshold_max": 10
  },
  "devices/some/device/all": {
    "point0": {
      "threshold_max": 10,
      "threshold_min": 0
    },
    "point1": {
      "threshold_max": 42
    }
  }
}
```

## 2.11.7 Topic Watcher Agent

The Topic Watcher Agent listens to a set of configured topics and publishes an alert if they are not published within some time limit. In addition to “standard” topics the Topic Watcher Agent supports inspecting device *all* topics. This can be useful when a device contains volatile points that may not be published.

### Requirements

The Topic Watcher agent requires the Sqlite 3 package. This package can be installed in an activated environment with:

```
pip install sqlite3
```

## Configuration

Topics are organized by groups. Any alerts raised will summarize all missing topics in the group.

Individual topics have two configuration options. For standard topics configuration consists of a key value pair of the topic to its time limit.

The other option is for *all* publishes. The topic key is paired with a dictionary that has two keys, “seconds” and “points”. “seconds” is the topic’s time limit and “points” is a list of points to watch.

```
{
  "groupname": {
    "devices/fakedriver0/all": 10,

    "devices/fakedriver1/all": {
      "seconds": 10,
      "points": ["temperature", "PowerState"]
    }
  }
}
```

## 2.12 Platform Driver Framework

VOLTRON drivers act as an interface between agents on the platform and a device. While running on the platform, drivers are special purpose agents which instead of being run as a separate process, are run as a greenlet in the Platform Driver process.

Driver instances are created by the Platform Driver when a new driver configuration is added to the configuration store. Drivers use the following topic pattern *devices/<campus>/<building>/<device id>*. When a configuration file is added to the Platform Driver’s store using this pattern, the Platform Driver creates a Driver Agent. The Driver agent is then instantiated with an instance of the Interface class corresponding to the *driver\_type* parameter in the configuration file. The Interface class is responsible for implementing the communication paradigms of a device or protocol. Once configured, the Platform Driver periodically polls the Driver Agent for data which is collected from the interface class. Additionally, points can be requested ad-hoc via the Platform Driver’s JSON-RPC method “get\_point”. Points may be set by using JSON-RPC with the Actuator agent to set up a schedule and calling the “set\_point” method.

### 2.12.1 Driver Conventions

- Drivers are polled by the Platform Driver agent and values can be set using the *Actuator Agent*.
- Drivers should have a 1-to-1 relationship with a device.
- Driver modules should be written in Python files in the *services/core/PlatformDriverAgent/platform\_driver/interfaces* directory in the VOLTRON repository. The platform driver will search for a Python file in this directory matching the name provided by the *driver\_type* value from the driver configuration when creating the Driver agent.
- Driver code consists of an Interface class (exactly named), supported in most cases by one or more Register classes.

## 2.12.2 Agent-Driver Communication Patterns

The VOLTTRON message bus has been developed to allow agents on the platform to interact with each other, as well as with ICS (Industrial Control Systems) and IOT (Internet of Things) devices via the VOLTTRON driver framework. Agents and drivers have the ability to publish data to the message bus and to subscribe to message bus topics to read in data as it is published. Additionally, agents may implement JSONRPC calls and expose JSONRPC endpoints to communicate more directly with other agents. The following diagram demonstrates typical platform communication patterns for a single platform deployment.

### Typical Single Platform Behavior

The diagram features several entities that comprise the platform and its connected components:

- The VOLTTRON message bus - The message bus is the means of transmission of information in VOLTTRON. The VOLTTRON message bus is built around existing message bus software; currently VOLTTRON supports RabbitMQ and ZeroMQ. The VOLTTRON integration includes Pub/Sub and JSON RPC interfaces for agent and driver communication.
- VOLTTRON Platform Agents and Subsystems - These agents and subsystems are installed on the platform to manage the platform. They provide many user facing functions, aid in communication, and manage other agents and drivers.
- User's Agents - These agents are either agents included in the core repository but installed by a user or built by an end-user's agent modules. They may perform a huge variety of user specified tasks, including data collection, device control, simulation, etc.
- Platform Driver Agent - This agent facilitates communication with drivers. Agents should not communicate directly with drivers. The platform driver implements several features for communicating with drivers to ensure smooth operation and consistent driver behavior.
- Actuator agent - This agent provides scheduling capability for controlling drivers. The Platform Driver does not include protections for race conditions, etc. It is always recommended to use the Actuator agent to set values on a device.
- Device Driver - Drivers are special purpose agents which provide an interface between the platform driver and devices such as Modbus and BACnet devices. Drivers implement a specific set of features for protecting device communication and ensure uniform behaviors across different devices.
- Device - Devices may be low level physical computers for controlling various systems such as PLCs (Programmable Logic Controller), devices which communicate on the local network (such as a Smart T.V.), or devices which are accessed via a remote web API (other smart devices).

### Lines of Communication

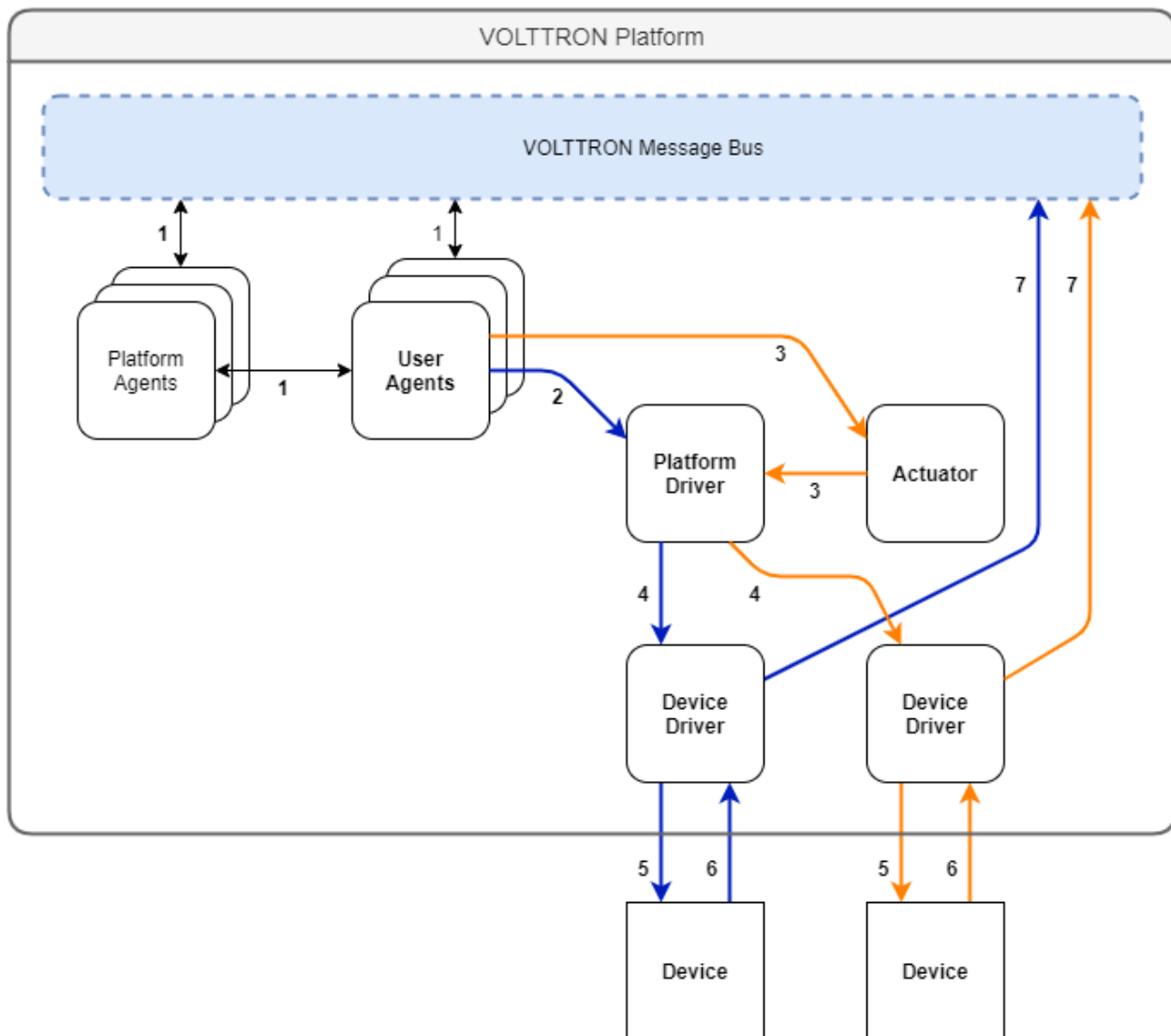
Connectivity of the platform follows the following paradigm:

- Platform agents (including the Platform Driver and Actuator), subsystems, and user agents communicate with the message bus via a publish/subscribe system.
- Agents can communicate “directly” to each other via JSONRPC (RPC). A JSONRPC call uses the VOLTTRON message bus router to “direct” messages to an intended recipient. RPC calls from an agent specify a function for the recipient to perform including input parameters; the response to the sender should contain the value output by the specified function.
- The Platform Driver will periodically poll device drivers. This functionality is intentionally not user-facing. The Platform Driver iterates over the configured drivers and calls their respective “scrape\_all” methods. This will trigger the drivers to collect point values.

- The Driver will communicate with its configured end devices to collect data points which it then returns to the driver. The driver then publishes the point data to the bus under the `<campus>/<building>/<device id>/all` topic.
- To get an individual device point, the user agent should send an RPC call to the Platform Driver for “get\_point”, providing the point’s corresponding topic. After the Platform Driver processes the request, communication happens very similarly to polling, but rather than an “all” publish, the data is returned via the Platform Driver to the user agent.
- To set a point on a device, it is recommended to use an Actuator Agent. The user agent sends an RPC request to the Actuator to schedule time for the agent to control the device. During that scheduled time the user agent may send it a set point request. If the schedule has been created, the actuator will then forward that request to the Platform Driver, at which point the communication happens similarly to a “get\_point” request.

The general paradigm for the device-driver relationship as specified by the VOLTTTRON driver framework is a 1-to-1 relationship. Each end device should be interacted with via a single device driver configured on one platform. To distribute device data, the DataPuller and forwarder agents can be used at the platform level. Multiple platforms are not intended to collect data or share control of a single device.

The below diagram demonstrates driver communication on the platform in a typical case.



1. Platform agents and agents developed and/or installed by users communicate with the platform via pub/sub or JSON-RPC. Agents share data for a number of reasons including querying historians for data to use in control algorithms, fetching data from remote web APIs and monitoring.
2. A user agent which wants to request data ad-hoc sends a JSON-RPC request to the Platform Driver to *get\_point*, asking the driver to fetch the most up-to-date point data for the point topic provided.

---

**Note:** For periodic *scrape\_all* data publishes, step 2 is not required. The Platform Driver is configured to automatically collect all point data for a device on a regular interval and publish the data to the bus.

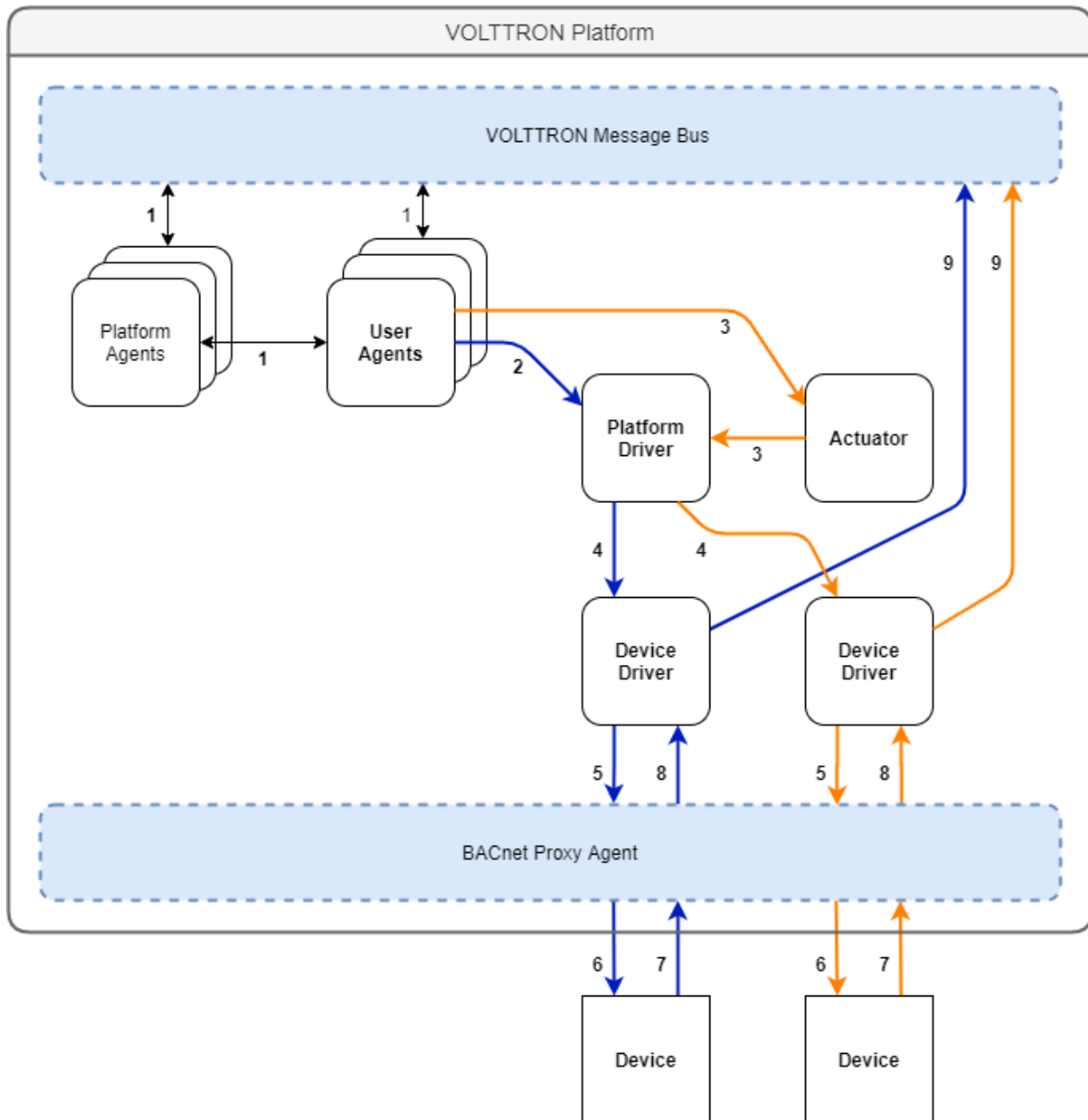
---

3. A user agent sends a request to the actuator to establish a schedule for sending device control signals, and during the scheduled time sends a *set\_point* request to the Actuator. Given that the control signal arrives during the scheduled period, the Actuator forwards the request to the Platform Driver. If the control signal arrives outside the scheduled period or without an existing schedule, a *LockError* exception will be thrown.
4. The Platform Driver issues a *get\_point/set\_point* call to the Driver corresponding to the request it was sent.
5. The device driver uses the interface class it is configured for to send a data request or control signal to the device (i.e. the BACnet driver issues a *readProperty* request to the device).
6. The device returns a response indicating the current state.
7. The the response is forwarded to the requesting device. In the case of a *scrape\_all*, the device data is published to the message bus.

## Special Case Drivers

Some drivers require a different communication paradigm. One common alternative is shown in the diagram below:





This example describes an alternative pattern wherein BACnet drivers communicate via a BACnet proxy agent to communicate with end devices. This behavior is derived from the networking requirements of the BACnet specification. BACnet communication in the network layer requires that only one path exist between BACnet devices on a network. In this case, the BACnet proxy acts as a virtual BACnet device, and device drivers forward their requests to this agent which then implements the BACnet communication (whereas the typical pattern would have devices communicate directly with the corresponding device). There are many other situations which may require this paradigm to be adopted (such as working with remote APIs with request limits), and it is up to the party implementing the driver to determine if this pattern or another pattern may be the most appropriate implementation pattern for their respective use case.

**Note:** Other requirements for driver communication patterns may exist, but on an individual basis. Please refer to the documentation for the driver of interest for more about any atypical pattern that must be adhered to.

### 2.12.3 Installing the Fake Driver

The Fake Driver is included as a way to quickly see data published to the message bus in a format that mimics what a real driver would produce. This is a simple implementation of the VOLTTRON driver framework.

See *[instructions for installing the fake driver](#)*

To view data being published from the fake driver on the message bus, one can *[install the Listener Agent](#)* and read the VOLTTRON log file:

```
cd <root volttron directory>
tail -f volttron.log
```

### Platform Driver

The Platform Driver agent is a special purpose agent a user can install on the platform to manage communication of the platform with devices. The Platform driver features a number of endpoints for collecting data and sending control signals using the message bus and automatically publishes data to the bus on a specified interval.

#### How does it work?

The Platform Driver creates a number of driver instances based on the contents of its config store; for each combination of driver configuration, registry configuration and other referenced config files, a driver instance is created by the Platform Driver. When configuration files are removed, the corresponding driver instance is removed by the Platform Driver.

Drivers are special-purpose agents for device communication, and unlike most agents, run as separate threads under the Platform Driver (typically agents are spawned as their own process). While running, the driver periodically “scrapes” device data and publishes the scrape to the message bus, as well as handling ad-hoc data collection and control signalling commands issued from the Platform Driver. The actual commands are issued to devices by the driver’s “Interface” class.

An Interface class is a Python class which serves as the interface between the driver and the device. The Interface does this by implementing a set of well-defined actions using the communication paradigms and protocols used by the device. For devices such as BACnet and Modbus devices, interfaces wrap certain protocol functions in Python code to be used by the driver. In other cases, interfaces interact with web-API’s, etc.

### Device/Driver Communication

Device communication with the Platform Driver typically occurs using the following steps:

1. Platform agents and the user’s agents communicate between themselves and the message bus using publish/subscribe or JSON-RPC
2. The user’s agent sends a JSON-RPC request to the Platform Driver to *get\_point*
3. And/Or the user’s agent sends a JSON-RPC request to the Actuator to *set\_point*
4. The Platform Driver forwards the request to the driver instance specified in the request
5. The device driver communicates with the end device
6. The end device returns a response to the driver indicating its current status
7. The driver publishes the device’s response to the message bus using a publish

For more in-depth descriptions and coverage of atypical scenarios, read up on *[the driver communication patterns](#)*.

## Configuration and Installation

Configuration for each device consists of 3 parts:

- Platform Driver Agent configuration file - lists all driver configuration files to load
- Driver configuration file - contains the general driver configuration and device settings
- Device Register configuration file - contains the settings for each individual data point on the device

For each device, you must create a driver configuration file, device register configuration file, and an entry in the Platform Driver Agent configuration file.

Once configured, the Platform Driver Agent is configured and deployed in a manner similar to any other agent:

```
python scripts/install-agent.py -s services/core/PlatformDriverAgent -c <platform_
↳driver config file>
```

## Requirements

VOLTTRON drivers operated by the platform driver may have additional requirements for installation. Required libraries:

```
BACnet driver - bacpypes
Modbus driver - pymodbus
Modbus_TK driver - modbus-tk
DNP3 and IEEE 2030.5 drivers - pydnp3
```

The easiest way to install the requirements for drivers included in the VOLTTRON repository is to use `bootstrap.py` (see [platform installation for more detail](#))

## Platform Driver Configuration

The Platform Driver Agent configuration consists of general settings for all devices. The default values of the Platform Driver should be sufficient for most users. The user may optionally change the interval between device scrapes with the `driver_scrape_interval`.

The following example sets the `driver_scrape_interval` to 0.05 seconds or 20 devices per second:

```
{
  "driver_scrape_interval": 0.05,
  "publish_breadth_first_all": false,
  "publish_depth_first": false,
  "publish_breadth_first": false,
  "publish_depth_first_all": true,
  "group_offset_interval": 0.0
}
```

- **driver\_scrape\_interval** - Sets the interval between devices scrapes. Defaults to 0.02 or 50 devices per second. Useful for when the platform scrapes too many devices at once resulting in failed scrapes.
- **group\_offset\_interval** - Sets the interval between when groups of devices are scraped. Has no effect if all devices are in the same group.

In order to improve the scalability of the platform unneeded device state publishes for all devices can be turned off. All of the following setting are optional and default to `True`.

- **publish\_depth\_first\_all** - Enable “depth first” publish of all points to a single topic for all devices.
- **publish\_breadth\_first\_all** - Enable “breadth first” publish of all points to a single topic for all devices.
- **publish\_depth\_first** - Enable “depth first” device state publishes for each register on the device for all devices.
- **publish\_breadth\_first** - Enable “breadth first” device state publishes for each register on the device for all devices.

An example platform driver configuration file can be found in the VOLTTRON repository in *services/core/PlatformDriverAgent/platform-driver.agent*.

## Driver Configuration File

---

**Note:** The terms *register* and *point* are used interchangeably in the documentation and in the configuration setting names. They have the same meaning in the context of VOLTTRON drivers.

---

Each device configuration has the following form:

```
{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/vav.csv",
  "interval": 60,
  "heart_beat_point": "heartbeat",
  "group": 0
}
```

The following settings are required for all device configurations:

- **driver\_config** - Driver specific setting go here. See below for driver specific settings.
- **driver\_type** - Type of driver to use for this device: bacnet, modbus, fake, etc.
- **registry\_config** - Reference to a configuration file in the configuration store for registers on the device. See the [Registry-Configuration-File](#) section below and/or the [Adding Device Configurations to the Configuration Store](#) section in the driver framework docs.

These settings are optional:

- **interval** - Period to scrape the device and publish the results in seconds. Defaults to 60 seconds.
- **heart\_beat\_point** - A Point which to toggle to indicate a heartbeat to the device. A point with this Volttron Point Name must exist in the registry. If this setting is missing the driver will not send a heart beat signal to the device. Heart beats are triggered by the [Actuator Agent](#) which must be running to use this feature.
- **group** - Group this device belongs to. Defaults to 0

These settings are used to create the topic that this device will be referenced by following the VOLTTRON convention of {campus}/{building}/{unit}. This will also be the topic published on, when the device is periodically scraped for its current state.

The topic used to reference the device is derived from the name of the device configuration in the store. See the [Adding Device Configurations to the Configuration Store](#) section of the driver framework docs.

## Device Grouping

Devices may be placed into groups to separate them logically when they are scraped. This is done by setting the *group* in the device configuration. *group* is a number greater than or equal to 0. Only number of devices in the same group and the *group\_offset\_interval* are considered when determining when to scrape a device.

This is useful in two cases:

- If you need to ensure that certain devices are scraped in close proximity to each other you can put them in their own group. If this causes devices to be scraped too quickly the groups can be separated out time wise using the *group\_offset\_interval* setting.
- You may scrape devices on different networks in parallel for performance. For instance BACnet devices behind a single MSTP router need to be scraped slowly and serially, but devices behind different routers may be scraped in parallel. Grouping devices by router will do this automatically.

The *group\_offset\_interval* is applied by multiplying it by the *group* number. If you intend to use *group\_offset\_interval* only use consecutive *group* values that start with 0.

## Registry Configuration File

Registry configuration files setup each individual point on a device. Typically this file will be in CSV format, but the exact format is driver specific. See the section for a particular driver for the registry configuration format.

The following is a simple example of a Modbus registry configuration file:

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Refer- ence Point Name	Volttron Point Name	Units	Units Details	Modbus Register	Writable	Point Ad- dress	De- fault Value	Notes
CO2Sensor	Retur- nAirCO2	PPM	0.00- 2000.00	>f	FALSE	1001		CO2 Reading 0.00- 2000.0 ppm
CO2Stpt	Retur- nAirCO2Stpt	PPM	1000.00 (default)	>f	TRUE	1011	1000	Setpoint to enable de- mand control ventila- tion
HeatCall2	HeatCall2	On / Off	on/off	BOOL	FALSE	1114		Status indicator of heating stage 2 need

## Adding Device Configurations to the Configuration Store

Configurations are added to the Configuration Store using the command line:

```
volttron-ctl config store platform.driver <name> <file name> <file type>
```

- **name** - The name used to refer to the file from the store.
- **file name** - A file containing the contents of the configuration.
- **file type** - `--raw`, `--json`, or `--csv`. Indicates the type of the file. Defaults to `--json`.

The main configuration must have the name `config`

Device configuration but **not** registry configurations must have a name prefixed with `devices/`. Scripts that automate the process will prefix registry configurations with `registry_configs/`, but that is not a requirement for registry files.

The name of the device's configuration in the store is used to create the topic used to reference the device. For instance, a configuration named *devices/PNNL/ISB1/vav1* will publish scrape results to *devices/PNNL/ISB1/vav1* and is accessible with the Actuator Agent via *PNNL/ISB1/vav1*.

The name of a registry configuration must match the name used to refer to it in the driver configuration. The reference is not case sensitive.

If the Platform Driver Agent is running, any changes to the configuration store will immediately affect the running devices according to the changes.

## Example

Consider the following three configuration files: A platform driver configuration called *platform-driver.agent*, a Modbus device configuration file called *modbus\_driver.config* and corresponding Modbus registry configuration file called *modbus\_registry.csv*

To store the platform driver configuration run the command:

```
volttron-ctl config store platform.driver config platform-driver.agent
```

To store the registry configuration run the command (note the `--csv` option):

```
volttron-ctl config store platform.driver registry_configs/modbus_registry.csv modbus_
↪registry.csv --csv
```

---

**Note:** The *registry\_configs/modbus\_registry.csv* argument in the above command must match the reference to the *registry\_config* found in *modbus\_driver.config*.

---

To store the driver configuration run the command:

```
volttron-ctl config store platform.driver devices/my_campus/my_building/my_device_
↪modbus_config.config
```

## Converting Old Style Configuration

The new Platform Driver no longer supports the old style of device configuration. The old *device\_list* setting is ignored.

To simplify updating to the new format, *scripts/update\_platform\_driver\_config.py* is provided to automatically update to the new configuration format.

With the platform running run:

```
python scripts/update_platform_driver_config.py <old configuration> <output>
```

*old\_configuration* is the main configuration file in the old format. The script automatically modifies the driver files to create references to CSV files and adds the CSV files with the appropriate name.

*output* is the target output directory.

If the `--keep-old` switch is used, the old configurations in the output directory (if any) will not be deleted before new configurations are created. Matching names will still be overwritten.

The output from *scripts/update\_platform\_driver\_config.py* can be automatically added to the configuration store for the Platform Driver agent with *scripts/install\_platform\_driver\_configs.py*.

Creating and naming configuration files in the form needed by `scripts/install_platform_driver_configs.py` can speed up the process of changing and updating a large number of configurations. See the `--help` message for `scripts/install_platform_driver_configs.py` for more details.

## Device Scalability Settings

To improve the scalability of the platform, unneeded device state publishes for a device can be turned off. All of the following settings are optional and will override the value set in the main platform driver configuration.

- **publish\_depth\_first\_all** - Enable “depth first” publish of all points to a single topic.
- **publish\_breadth\_first\_all** - Enable “breadth first” publish of all points to a single topic.
- **publish\_depth\_first** - Enable “depth first” device state publishes for each register on the device.
- **publish\_breadth\_first** - Enable “breadth first” device state publishes for each register on the device.

It is common practice to set `publish_breadth_first_all`, `publish_depth_first`, and `publish_breadth_first` to `False` unless they are specifically needed by an agent running on the platform.

---

**Note:** All Historian Agents require `publish_depth_first_all` to be set to `True` in order to capture data.

---

## Usage

After installing the Platform Driver and loading driver configs into the config store, the installed drivers begin polling and JSON-RPC endpoints become usable.

## Polling

Once running, the Platform Driver will spawn drivers using the `driver_type` parameter of the *driver configuration* and periodically poll devices for all point data specified in the *registry configuration* at the interval specified by the interval parameter of the driver configuration.

By default, the value of each register on a device is published 4 different ways when the device state is published. Consider the following settings in a driver configuration stored under the name `devices/pnnl/isb1/vav1`:

```
{
  "driver_config": {"device_address": "10.1.1.5",
                   "device_id": 500},

  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/vav.csv",
}
```

In the `vav.csv` file, a register has the name *temperature*. For these examples the current value of the register on the device happens to be 75.2 and the meta data is

```
{ "units": "F" }
```

When the driver publishes the device state the following two things will be published for this register:

A “depth first” publish to the topic `devices/pnnl/isb1/vav1/temperature` with the following message:

```
[75.2, {"units": "F"}]
```

A “breadth first” publish to the topic *devices/temperature/vav1/isb1/pnnl* with the following message:

```
[75.2, {"units": "F"}]
```

These publishes can be turned off by setting *publish\_depth\_first* and *publish\_breadth\_first* to *false* respectively.

Also these two publishes happen once for all registers:

A “depth first” publish to the topic *devices/pnnl/isb1/vav1/all* with the following message:

```
[{"temperature": 75.2, ...}, {"temperature":{"units": "F"}, ...}]
```

A “breadth first” publish to the topic *devices/all/vav1/isb1/pnnl* with the following message:

```
[{"temperature": 75.2, ...}, {"temperature":{"units": "F"}, ...}]
```

These publishes can be turned off by setting *publish\_depth\_first\_all* and *publish\_breadth\_first\_all* to *false* respectively.

## JSON-RPC Endpoints

**get\_point** - Returns the value of specified device set point

### Parameters

- **path** - device topic string (typical format is *devices/campus/building/device*)
- **point\_name** - name of device point from registry configuration file

**set\_point** - Set value on specified device set point. If global override is condition is set, raise **OverrideError** exception.

### Parameters

- **path** - device topic string (typical format is *devices/campus/building/device*)
- **point\_name** - name of device point from registry configuration file
- **value** - desired value to set for point on device

**Warning:** It is not recommended to call the *set\_point* method directly. It is recommended to instead use the *Actuator* agent to set points on a device, using its scheduling capability.

**scrape\_all** - Returns values for all set points on the specified device.

### Parameters

- **path** - device topic string (typical format is *devices/campus/building/device*)

**get\_multiple\_points** - return values corresponding to multiple points on the same device

### Parameters

- **path** - device topic string (typical format is *devices/campus/building/device*)
- **point\_names** - iterable of device point names from registry configuration file



**set\_multiple\_points** - Set values on multiple set points at once. If global override is condition is set, raise OverrideError exception.

#### Parameters

- **path** - device topic string (typical format is devices/campus/building/device)
- **point\_names\_value** - list of tuples consisting of (point\_name, value) pairs for setting a series of points

**heart\_beat** - Send a heartbeat/keep-alive signal to all devices configured for Platform Driver

**revert\_point** - Revert the set point of a device to its default state/value. If global override is condition is set, raise OverrideError exception.

#### Parameters

- **path** - device topic string (typical format is devices/campus/building/device)
- **point\_name** - name of device point from registry configuration file

**revert\_device** - Revert all the set point values of the device to default state/values. If global override is condition is set, raise OverrideError exception.

#### Parameters

- **path** - device topic string (typical format is devices/campus/building/device)

**set\_override\_on** - Turn on override condition on all the devices matching the specified pattern ( [override docs](#))

#### Parameters

- **pattern** - Override pattern to be applied. For example,
  - If pattern is *campus/building1/\** - Override condition is applied for all the devices under *campus/building1/*.
  - If pattern is *campus/building1/ahu1* - Override condition is applied for only *campus/building1/ahu1* The pattern matching is based on bash style filename matching semantics.
- **duration** - Duration in seconds for the override condition to be set on the device (default 0.0, duration <= 0.0 imply indefinite duration)
- **failsafe\_revert** - Flag to indicate if all the devices falling under the override condition must to be set to its default state/value immediately.
- **staggered\_revert** -

**set\_override\_off** - Turn off override condition on all the devices matching the pattern.

#### Parameters

- **pattern** - device topic pattern for devices on which the override condition should be removed.

**get\_override\_devices** - Get a list of all the devices with override condition.

**clear\_overrides** - Turn off override condition for all points on all devices.

**get\_override\_patterns** - Get a list of all override condition patterns currently set.

## Driver Override Condition

By default, every user is allowed write access to the devices by the platform driver. The override feature will allow the user (for example, building administrator) to override this default behavior and enable the user to lock the write access on the devices for a specified duration of time or indefinitely.

### Set Override On

The Platform Driver's `set_override_on` RPC method can be used to set the override condition for all drivers with topic matching the provided pattern. This can be specific devices, groups of devices, or even all configured devices. The pattern matching is based on bash style filename matching semantics.

Parameters:

- **pattern:** Override pattern to be applied. For example,
  - If the pattern is `campus/building1/*` the override condition is applied for all the devices under *campus/building1/*.
  - If the pattern is `campus/building1/ahu1` the override condition is applied for only the *campus/building1/ahu1* device. The pattern matching is based on bash style filename matching semantics.
- **duration:** Time duration for the override in seconds. If `duration <= 0.0`, it implies an indefinite duration.
- **failsafe\_revert:** Flag to indicate if all the devices falling under the override condition has to be set to its default state/value immediately.
- **staggered\_revert:** If this flag is set, reverting of devices will be staggered.

Example `set_override_on` RPC call:

```
self.vip.rpc.call(PLATFORM_DRIVER, "set_override_on", <override pattern>, <override_  
↪duration>)
```

### Set Override Off

The override condition can also be toggled off based on a provided pattern using the Platform Driver's `set_override_off` RPC call.

Parameters:

- **pattern:** Override pattern to be applied. For example,
  - If the pattern is `campus/building1/*` the override condition is removed for all the devices under *campus/building1/*.
  - If the pattern is `campus/building1/ahu1` the override condition is removed for only for the *campus/building1/ahu1* device. The pattern matching is based on bash style filename matching semantics.

Example `set_override_off` RPC call:

```
self.vip.rpc.call(PLATFORM_DRIVER, "set_override_off", <override pattern>)
```

## Get Override Devices

A list of all overridden devices can be obtained with the Platform Driver's `get_override_devices` RPC call.

This method call has no additional parameters.

Example `get_override_devices` RPC call:

```
self.vip.rpc.call(PLATFORM_DRIVER, "get_override_devices")
```

## Get Override Patterns

A list of all patterns which have been requested for override can be obtained with the Platform Driver's `get_override_patterns` RPC call.

This method call has no additional parameters

Example “`get_override_patterns`” RPC call:

```
self.vip.rpc.call(PLATFORM_DRIVER, "get_override_patterns")
```

## Clear Overrides

All overrides set by RPC calls described above can be toggled off at using a single `clear_overrides` RPC call.

This method call has no additional parameters

Example “`clear_overrides`” RPC call:

```
self.vip.rpc.call(PLATFORM_DRIVER, "clear_overrides")
```

For information on the global override feature specification, view the *Global Override Specification* doc.

## Actuator Agent

This agent is used to manage write access to devices. Agents may request scheduled times, called Tasks, to interact with one or more devices.

### Actuator Agent Communication

#### Scheduling a Task

An agent can request a task schedule by publishing to the `devices/actuators/schedule/request` topic with the following header:

```
{
  'type': 'NEW_SCHEDULE',
  'requesterID': <Ignored, VIP Identity used internally>
  'taskID': <unique task ID>, #The desired task ID for this task. It must be unique,
  ↳ among all other scheduled tasks.
  'priority': <task priority>, #The desired task priority, must be 'HIGH', 'LOW',
  ↳ or 'LOW_PREEMPT'
}
```

with the following message:

```
[
  ["campus/building/device1", #First time slot.
   "2013-12-06 16:00:00",     #Start of time slot.
   "2013-12-06 16:20:00"],    #End of time slot.
  ["campus/building/device1", #Second time slot.
   "2013-12-06 18:00:00",     #Start of time slot.
   "2013-12-06 18:20:00"],    #End of time slot.
  ["campus/building/device2", #Third time slot.
   "2013-12-06 16:00:00",     #Start of time slot.
   "2013-12-06 16:20:00"],    #End of time slot.
  #etc...
]
```

**Warning:** If time zones are not included in schedule requests then the Actuator will interpret them as being in local time. This may cause remote interaction with the actuator to malfunction.

## Points on Task Scheduling

- Everything in the header is required
- Task id and requester id (agentid) should be a non empty value of type string
- A Task schedule must have at least one time slot.
- The start and end times are parsed with `dateutil's date/time parser`. **The default string representation of a python datetime object will parse without issue.**
- Two Tasks are considered conflicted if at least one time slot on a device from one task overlaps the time slot of the other on the same device.
- The end time of one time slot can be the same as the start time of another time slot for the same device. This will not be considered a conflict. For example, `time_slot1(device0, time1, **time2**)` and `time_slot2(device0, **time2**, time3)` are not considered a conflict
- A request must not conflict with itself
- If something goes wrong see [this failure string list](#) for an explanation of the error.

## Task Priorities

- **HIGH:** This Task cannot be preempted under any circumstance. This task may preempt other conflicting preemptable Tasks.
- **LOW:** This Task cannot be preempted **once it has started**. A Task is considered started once the earliest time slot on any device has been reached. This Task may **not** preempt other Tasks.
- **LOW\_PREEMPT:** This Task may be preempted at any time. If the Task is preempted once it has begun running any current time slots will be given a grace period (configurable in the ActuatorAgent configuration file, defaults to 60 seconds) before being revoked. This Task may **not** preempt other Tasks.

## Canceling a Task

A task may be canceled by publishing to the *devices/actuators/schedule/request* topic with the following header:

```
{
  'type': 'CANCEL_SCHEDULE',
  'requesterID': <Ignored, VIP Identity used internally>
  'taskID': <unique task ID>, #The desired task ID for this task. It must be unique,
  ↳among all other scheduled tasks.
}
```

## Points on Task Canceling

- The requesterID and taskID must match the original values from the original request header.
- After a Tasks time has passed there is no need to cancel it. Doing so will result in a *TASK\_ID\_DOES\_NOT\_EXIST* error.
- If something goes wrong see *this failure string list* for an explanation of the error.

## Actuator Agent Schedule Response

In response to a Task schedule request the ActuatorAgent will respond on the topic *devices/actuators/schedule/result* with the header:

```
{
  'type': <'NEW_SCHEDULE', 'CANCEL_SCHEDULE'>
  'requesterID': <Agent VIP identity from the request>,
  'taskID': <Task ID from the request>
}
```

And the message (after parsing the json):

```
{
  'result': <'SUCCESS', 'FAILURE', 'PREEMPTED'>,
  'info': <Failure reason, if any>,
  'data': <Data about the failure or cancellation, if any>
}
```

The Actuator Agent may publish cancellation notices for preempted Tasks using the *PREEMPTED* result.

## Preemption Data

Preemption data takes the form:

```
{
  'agentID': <Agent ID of preempting task>,
  'taskID': <Task ID of preempting task>
}
```

## Failure Reasons

In many cases the Actuator Agent will try to give good feedback as to why a request failed.

### General Failures

- *INVALID\_REQUEST\_TYPE*: Request type was not *NEW\_SCHEDULE* or *CANCEL\_SCHEDULE*.
- *MISSING\_TASK\_ID*: Failed to supply a taskID.
- *MISSING\_AGENT\_ID*: AgentID not supplied.

### Task Schedule Failures

- *TASK\_ID\_ALREADY\_EXISTS*: The supplied taskID already belongs to an existing task.
- *MISSING\_PRIORITY*: Failed to supply a priority for a Task schedule request.
- *INVALID\_PRIORITY*: Priority not one of *HIGH*, *LOW*, or *LOW\_PREEMPT*.
- *MALFORMED\_REQUEST\_EMPTY*: Request list is missing or empty.
- *REQUEST\_CONFLICTS\_WITH\_SELF*: Requested time slots on the same device overlap.
- *MALFORMED\_REQUEST*: Reported when the request parser raises an unhandled exception. The exception name and info are appended to this info string.
- *CONFLICTS\_WITH\_EXISTING\_SCHEDULES*: This schedule conflict with an existing schedules that it cannot preempt. The data item for the results will contain info about the conflicts in this form (after parsing json)

```
{
  '<agentID1>':
  {
    '<taskID1>':
    [
      ["campus/building/device1",
       "2013-12-06 16:00:00",
       "2013-12-06 16:20:00"],
      ["campus/building/device1",
       "2013-12-06 18:00:00",
       "2013-12-06 18:20:00"]
    ]
    '<taskID2>': [...]
  }
  '<agentID2>': {...}
}
```

## Task Cancel Failures

- *TASK\_ID\_DOES\_NOT\_EXIST*: Trying to cancel a Task which does not exist. This error can also occur when trying to cancel a finished Task.
- *AGENT\_ID\_TASK\_ID\_MISMATCH*: A different agent ID is being used when trying to cancel a Task.

## Actuator Agent Value Request

Once an Task has been scheduled and the time slot for one or more of the devices has started an agent may interact with the device using the **get** and **set** topics.

Both **get** and **set** are responded to the same way. See *Actuator Reply* below.

### Getting values

While a driver for a device should always be setup to periodically broadcast the state of a device you may want an up-to-the-moment value for an actuation point on a device.

To request a value publish a message to the following topic:

```
'devices/actuators/get/<full device path>/<actuation point>'
```

### Setting Values

Value are set in a similar manner:

To set a value publish a message to the following topic:

```
'devices/actuators/set/<full device path>/<actuation point>'
```

With this header:

```
#python
{
    'requesterID': <Ignored, VIP Identity used internally>
}
```

And the message contents being the new value of the actuator.

**Warning:** The actuator agent expects all messages to be JSON and will parse them accordingly. Use *publish\_json* to send messages where possible. This is significant for Boolean values especially

## Actuator Reply

The ActuatorAgent will reply to both *get* and *set* on the *value* topic for an actuator:

```
'devices/actuators/value/<full device path>/<actuation point>'
```

With this header:

```
{
  'requesterID': <Agent VIP identity>
}
```

With the message containing the value encoded in JSON.

## Actuator Error Reply

If something goes wrong the Actuator Agent will reply to both *get* and *set* on the *error* topic for an actuator:

```
'devices/actuators/error/<full device path>/<actuation point>'
```

With this header:

```
{
  'requesterID': <Agent VIP identity>
}
```

The message will be in the following form:

```
{
  'type': <Error Type or name of the exception raised by the request>
  'value': <Specific info about the error>
}
```

## Common Error Types

- *LockError*: Returned when a request is made when we do not have permission to use a device. (Forgot to schedule, preempted and we did not handle the preemption message correctly, ran out of time in time slot, etc...)
- *ValueError*: Message missing or could not be parsed as JSON

## Schedule State Broadcast

Periodically the ActuatorAgent will publish the state of all currently scheduled devices. For each device the Actuator-Agent will publish to an associated topic:

```
'devices/actuators/schedule/announce/<full device path>'
```

With the following header:



```
{
  'requesterID': <VIP identity of agent with access>,
  'taskID': <Task associated with the time slot>
  'window': <Seconds remaining in the time slot>
}
```

The frequency of the updates is configurable with the *schedule\_publish\_interval* setting.

## Task Preemption

Both *LOW* and *LOW\_PREEMPT* priority Tasks can be preempted. *LOW* priority Tasks may be preempted by a conflicting *HIGH* priority Task before it starts. *LOW\_PREEMPT* priority Tasks can be preempted by *HIGH* priority Tasks even after they start.

When a Task is preempted the ActuatorAgent will publish to *devices/actuators/schedule/response* with the following header:

```
{
  'type': 'CANCEL_SCHEDULE',
  'requesterID': <Agent VIP identity for the preempted Task>,
  'taskID': <Task ID for the preempted Task>
}
```

And the message (after parsing the json):

```
{
  'result': 'PREEMPTED',
  'info': '',
  'data':
    {
      'agentID': <Agent VIP identity of preempting task>,
      'taskID': <Task ID of preempting task>
    }
}
```

## Preemption Grace Time

If a *LOW\_PREEMPT* priority Task is preempted while it is running the Task will be given a grace period to clean up before ending. For every device which has a current time slot the window of remaining time will be reduced to the grace time. At the end of the grace time the Task will finish. If the Task has no currently open time slots on any devices it will end immediately.

## ActuatorAgent Configuration

- *schedule\_publish\_interval*: Interval between current schedules being published to the message bus for all devices
- *preempt\_grace\_time*: Minimum time given to Tasks which have been preempted to clean up in seconds. Defaults to 60
- *schedule\_state\_file*: File used to save and restore Task states if the ActuatorAgent restarts for any reason. File will be created if it does not exist when it is needed

## Sample configuration file

```
{
  "schedule_publish_interval": 30,
  "schedule_state_file": "actuator_state.pickle"
}
```

## Heartbeat Signal

The ActuatorAgent can be configured to send a heartbeat message to the device to indicate the platform is running. Ideally, if the heartbeat signal is not sent the device should take over and resume normal operation.

The configuration has two parts, the interval (in seconds) for sending the heartbeat and the specific point that should be modified each iteration.

The heart beat interval is specified with a global *heartbeat\_interval* setting. The ActuatorAgent will automatically set the heartbeat point to alternating “1” and “0” values. Changes to the heartbeat point will be published like any other value change on a device.

The heartbeat points are specified in the driver configuration file of individual devices.

## Notes on Working With the ActuatorAgent

- An agent can watch the window value from *device state updates* to perform scheduled actions within a timeslot
  - If an Agent’s Task is *LOW\_PREEMPT* priority it can watch for device state updates where the window is less than or equal to the grace period (default 60.0)
- When considering if to schedule long or multiple short time slots on a single device:
  - Do we need to ensure the device state for the duration between slots?
    - \* Yes: Schedule one long time slot instead
    - \* No: Is it all part of the same Task or can we break it up in case there is a conflict with one of our time slots?
- When considering time slots on multiple devices for a single Task:
  - Is the Task really dependent on all devices or is it actually multiple Tasks?
- When considering priority:
  - Does the Task have to happen **on an exact day**?
    - \* Yes: Use *HIGH*
    - \* No: Consider *LOW* and reschedule if preempted
  - Is it problematic to prematurely stop a Task once started?
    - \* Yes: Consider *LOW* or *HIGH*
    - \* No: Consider *LOW\_PREEMPT* and watch the device state updates for a small window value
- If an agent is only observing but needs to assure that no another Task is going on while taking readings it can schedule the time to prevent other agents from messing with a devices state. The schedule updates can be used as a reminder as to when to start watching
- **Any** device, existing or not, can be scheduled. This allows for agents to schedule fake devices to create reminders to start working later rather than setting up their own internal timers and schedules

## Fake Driver

The FakeDriver is included as a way to quickly see data published to the message bus in a format that mimics what a true Driver would produce. This is an extremely simple implementation of the *VOLTRON driver framework*.

## Fake Device Driver Configuration

This driver does not connect to any actual device and instead produces random and or pre-configured values.

## Driver Config

There are no arguments for the *driver\_config* section of the device configuration file. The *driver\_config* entry must still be present and should be left blank.

Here is an example device configuration file:

```
{
  "driver_config": {},
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/vav.csv",
  "interval": 5,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

A sample fake device configuration file can be found in the VOLTRON repository in *examples/configurations/drivers/fake.config*

## Fake Device Registry Configuration File

The registry configuration file is a *CSV* file. Each row configures a point on the device.

The following columns are required for each row:

- **Volttron Point Name** - The name by which the platform and agents running on the platform will refer to this point. For instance, if the *Volttron Point Name* is *HeatCall1* (and using the example device configuration above) then an agent would use *pnnl/isb2/hvac1/HeatCall1* to refer to the point when using the RPC interface of the actuator agent.
- **Units** - Used for meta data when creating point information on the historian.
- **Writable** - Either *TRUE* or *FALSE*. Determines if the point can be written to. Only points labeled *TRUE* can be written to through the ActuatorAgent. Points labeled *TRUE* incorrectly will cause an error to be returned when an agent attempts to write to the point.

The following columns are optional:

- **Starting Value** - Initial value for the point. If the point is reverted it will change back to this value. By default, points will start with a random value (1-100).
- **Type** - Value type for the point. Defaults to “string”. Valid types are:
  - string
  - integer
  - float

- boolean

Any additional columns will be ignored. It is common practice to include a *Point Name* or *Reference Point Name* to include the device documentation's name for the point and *Notes* and *Unit Details* for additional information about a point. Please note that there is nothing in the driver that will enforce anything specified in the *Unit Details* column.

Table 18: BACnet

Volttron Point Name	Units	Units Details	Writable	Starting Value	Type	Notes
Heartbeat	On/Off	On/Off	TRUE	0	boolean	Point for heartbeat toggle
OutsideAirTemperature1	F	-100 to 300	FALSE	50	float	CO2 Reading 0.00-2000.0 ppm
SampleWritableFloat1	PPM	10.00 (default)	TRUE	10	float	Setpoint to enable demand control ventilation
SampleLong1	Enumeration	1 through 13	FALSE	50	int	Status indicator of service switch
SampleWritableShort1	%	0.00 to 100.00 (20 default)	TRUE	20	int	Minimum damper position during the standard mode
SampleBool1	On / Off	on/off	FALSE	TRUE	boolean	Status indicator of cooling stage 1
SampleWritableBool1	On / Off	on/off	TRUE	TRUE	boolean	Status indicator

A sample fake registry configuration file can be found [here](#) or in the VOLTTRON repository in `examples/configurations/drivers/fake.csv`

## Installation

Installing a Fake driver in the *Platform Driver Agent* requires adding copies of the device configuration and registry configuration files to the Platform Driver's *configuration store*

- Create a config directory (if one doesn't already exist) inside your Volttron repository:

```
mkdir config
```

All local config files will be worked on here.

- Copy over the example config file and registry config file from the VOLTTRON repository:

```
cp examples/configurations/drivers/fake.config config/
cp examples/configurations/drivers/fake.csv config/
```

- Edit the driver config *fake.config* for the paths on your system:

```
{
  "driver_config": {},
  "registry_config": "config://fake.csv",
  "interval": 5,
  "timezone": "US/Pacific",
  "heart_beat_point": "Heartbeat",
  "driver_type": "fakedriver",
```

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```
"publish_breadth_first_all": false,
"publish_depth_first": false,
"publish_breadth_first": false
}
```

- Create a copy of the Platform Driver config from the VOLTRON repository:

```
cp examples/configurations/drivers/platform-driver.agent config/fake-platform-driver.
↪config
```

- Add fake.csv and fake.config to the *configuration store*:

```
vctl config store platform.driver devices/campus/building/fake config/fake.config
vctl config store platform.driver fake.csv config/fake.csv --csv
```

- Edit *fake-platform-driver.config* to reflect paths on your system

```
{
  "driver_scrape_interval": 0.05
}
```

- Use the scripts/install-agent.py script to install the Platform Driver agent:

```
python scripts/install-agent.py -s services/core/PlatformDriverAgent -c config/fake-
↪platform-driver.config
```

- If you have a *Listener Agent* already installed, you should start seeing data being published to the bus.

## BACnet Driver

### BACnet Driver Configuration

Communicating with BACnet devices requires that the *BACnet Proxy Agent* is configured and running. All device communication happens through this agent.

### Requirements

The BACnet driver requires the BACPypes package. This package can be installed in an activated environment with:

```
pip install bacpypes
```

Alternatively, running *bootstrap.py* with the `--drivers` option will install all requirements for drivers included in the repository including BACnet.

```
python3 bootstrap.py --drivers
```

**Warning:** Current versions of VOLTRON support **only** BACPypes version 0.16.7

## Driver Config

There are nine arguments for the *driver\_config* section of the device configuration file:

- **device\_address** - Address of the device. If the target device is behind an IP to MS/TP router then Remote Station addressing will probably be needed for the driver to find the device
- **device\_id** - BACnet ID of the device. Used to establish a route to the device at startup
- **min\_priority** - (Optional) Minimum priority value allowed for this device whether specifying the priority manually or via the registry config. Violating this parameter either in the configuration or when writing to the point will result in an error. Defaults to 8
- **max\_per\_request** - (Optional) Configure driver to manually segment read requests. The driver will only grab up to the number of objects specified in this setting at most per request. This setting is primarily for scraping many points off of low resource devices that do not support segmentation. Defaults to 10000
- **proxy\_address** - (Optional) *VIP* address of the BACnet proxy. Defaults to `platform.bacnet_proxy`. See [Communicating With Multiple BACnet Networks](#) for details. Unless your BACnet network has special needs you should not change this value
- **ping\_retry\_interval** - (Optional) The driver will ping the device to establish a route at startup. If the BACnet proxy is not available the driver will retry the ping at this interval until it succeeds. Defaults to 5
- **use\_read\_multiple** - (Optional) During a scrape the driver will tell the proxy to use a `ReadPropertyMultipleRequest` to get data from the device. Otherwise the proxy will use multiple `ReadPropertyRequest` calls. If the BACnet proxy is reporting a device is rejecting requests try changing this to false for that device. Be aware that setting this to false will cause scrapes for that device to take much longer. Only change if needed. Defaults to true
- **cov\_lifetime** - (Optional) When a device establishes a change of value subscription for a point, this argument will be used to determine the lifetime and renewal period for the subscription, in seconds. Defaults to 180 (Added to Platform Driver version 3.2)

Here is an example device configuration file:

```
{
  "driver_config": {
    "device_address": "10.1.1.3",
    "device_id": 500,
    "min_priority": 10,
    "max_per_request": 24
  },
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/vav.csv",
  "interval": 5,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

A sample BACnet configuration file can be found in the VOLTTRON repository at [examples/configurations/drivers/bacnet1.config](#)

## BACnet Registry Configuration File

The registry configuration file is a [CSV](#) file. Each row configures a point on the device.

Most of the configuration file can be generated with the `grab_bacnet_config.py` utility in `scripts/bacnet`. See [BACnet Auto-Configuration](#).

Currently, the driver provides no method to access array type properties even if the members of the array are of a supported type.

The following columns are required for each row:

- **Volttron Point Name** - The name by which the platform and agents running on the platform will refer to this point. For instance, if the Volttron Point Name is *HeatCall1* (and using the example device configuration above) then an agent would use *pnnl/isb2/hvac1/HeatCall1* to refer to the point when using the RPC interface of the Actuator agent
- **Units** - Used for meta data when creating point information on the historian.
- **BACnet Object Type** - A string representing what kind of BACnet standard object the point belongs to. Examples include:
  - analogInput
  - analogOutput
  - analogValue
  - binaryInput
  - binaryOutput
  - binaryValue
  - multiStateValue
- **Property** - A string representing the name of the property belonging to the object. Usually, this will be *present-Value*
- **Writable** - Either *TRUE* or *FALSE*. Determines if the point can be written to. Only points labeled *TRUE* can be written to through the Actuator Agent. Points labeled *TRUE* incorrectly will cause an error to be returned when an agent attempts to write to the point
- **Index** - Object ID of the BACnet object

The following columns are optional:

- **Write Priority** - BACnet priority for writing to this point. Valid values are 1-16. Missing this column or leaving the column blank will use the default priority of 16
- **COV Flag** - Either *True* or *False*. Determines if a BACnet Change-of-Value subscription should be established for this point. Missing this column or leaving the column blank will result in no change of value subscriptions being established. (Added to Platform Driver version 3.2)

Any additional columns will be ignored. It is common practice to include a *Point Name* or *Reference Point Name* column to include the device documentation's name for the point and *Notes* and *Unit Details* columns for additional information about a point.

Table 19: BACnet

Point Name	Volttron Point Name	Units	Unit tails	De-	BACnet Object Type	Property	Writable	Index	Notes
Build- ing/FCB.Local Application.PH-T	PreheatTem- perature	de- greesFahren- heit	-50.00 250.00	to	analogIn- put	pre- sent- Value	FALSE	30001	120 Reso- lution: 0.1
Build- ing/FCB.Local Application.RA-T	ReturnAirTem- perature	de- greesFahren- heit	-50.00 250.00	to	analogIn- put	pre- sent- Value	FALSE	30001	20 Reso- lution: 0.1
Build- ing/FCB.Local Application.RA-H	ReturnAirHu- midity	per- centRel- ativeHu- midity	0.00 100.00	to	analogIn- put	pre- sent- Value	FALSE	30001	24 Reso- lution: 0.1
Build- ing/FCB.Local Application.CLG- O	CoolingValve- OutputCom- mand	percent	0.00 100.00 (default 0.0)	to	analo- gOutput	pre- sent- Value	TRUE	30001	07 Reso- lution: 0.1
Build- ing/FCB.Local Application.MAD- O	MixedAir- DamperOutput- Command	percent	0.00 100.00 (default 0.0)	to	analo- gOutput	pre- sent- Value	TRUE	30001	10 Reso- lution: 0.1
Build- ing/FCB.Local Application.PH-O	PreheatValve- OutputCom- mand	percent	0.00 100.00 (default 0.0)	to	analo- gOutput	pre- sent- Value	TRUE	30001	11 Reso- lution: 0.1
Build- ing/FCB.Local Application.RH-O	ReheatValve- OutputCom- mand	percent	0.00 100.00 (default 0.0)	to	analo- gOutput	pre- sent- Value	TRUE	30001	12 Reso- lution: 0.1
Build- ing/FCB.Local Application.SF-O	Supply- FanSpeedOut- putCommand	percent	0.00 100.00 (default 0.0)	to	analo- gOutput	pre- sent- Value	TRUE	30001	13 Reso- lution: 0.1

A sample BACnet registry file can be found [here](#) or in the VOLTTRON repository in *examples/configurations/drivers/bacnet.csv*

## BACnet Proxy Agent

### Introduction

Communication with BACnet device on a network happens via a single virtual BACnet device. In VOLTTRON driver framework, we use a separate agent specifically for communicating with BACnet devices and managing the virtual BACnet device.



## Requirements

The BACnet Proxy agent requires the BACPytes package. This package can be installed in an activated environment with:

```
pip install bacpytes
```

Alternatively, running *bootstrap.py* with the *--drivers* option will install all requirements for drivers included in the repository including BACnet.

```
python3 bootstrap.py --drivers
```

**Warning:** Current versions of VOLTRON support **only** BACPytes version 0.16.7

## Configuration

The agent configuration sets up the virtual BACnet device.

```
{
    "device_address": "10.0.2.15",
    "max_apdu_length": 1024,
    "object_id": 599,
    "object_name": "Volttron BACnet driver",
    "vendor_id": 15,
    "segmentation_supported": "segmentedBoth"
}
```

### BACnet device settings

- **device\_address** - Address bound to the network port over which BACnet communication will happen on the computer running VOLTRON. This is **NOT** the address of any target device. See *BACnet Router Addressing*.
- **object\_id** - ID of the Device object of the virtual BACnet device. Defaults to 599. Only needs to be changed if there is a conflicting BACnet device ID on your network.

These settings determine the capabilities of the virtual BACnet device. BACnet communication happens at the lowest common denominator between two devices. For instance, if the BACnet proxy supports segmentation and the target device does not communication will happen without segmentation support and will be subject to those limitations. Consequently, there is little reason to change the default settings outside of the *max\_apdu\_length* (the default is not the largest possible value).

- **max\_apdu\_length** - (From bacpytes documentation) BACnet works on lots of different types of networks, from high-speed Ethernet to “slower” and “cheaper” ARCNET or MS/TP (a serial bus protocol used for a field bus defined by BACnet). For devices to exchange messages they have to know the maximum size message the device can handle. (End BACpytes docs)

This setting determines the largest APDU (Application Protocol Data Unit) accepted by the BACnet virtual device. Valid options are 50, 128, 206, 480, 1024, and 1476. Defaults to 1024.(Optional)

- **object\_name** - Name of the object. Defaults to “Volttron BACnet driver”. (Optional)
- **vendor\_id** - Vendor ID of the virtual BACnet device. Defaults to 15. (Optional)

- **segmentation\_supported** - (From bacpypes documentation) A vast majority of BACnet communications traffic fits into one message, but there can be times when larger messages are convenient and more efficient. Segmentation allows larger messages to be broken up into segments and spliced back together. It is not unusual for “low power” field equipment to not support segmentation. (End BACpypes docs)

Possible setting are “segmentedBoth” (default), “segmentedTransmit”, “segmentedReceive”, or “noSegmentation” (Optional)

## Device Addressing

In some cases, it will be needed to specify the subnet mask of the virtual device or a different port number to listen on. The full format of the BACnet device address is:

```
<ADDRESS>/<NETMASK>:<PORT>
```

where <PORT> is the port to use and <NETMASK> is the netmask length. The most common value is 24. See <http://www.computerhope.com/jargon/n/netmask.htm>

For instance, if you need to specify a subnet mask of 255.255.255.0 and the IP address bound to the network port is 192.168.1.2 you would use the address:

```
192.168.1.2/24
```

If your BACnet network is on a different port (47809) besides the default (47808) you would use the address:

```
192.168.1.2:47809
```

If you need to do both:

```
192.168.1.2/24:47809
```

## Communicating With Multiple BACnet Networks

If two BACnet devices are connected to different ports they are considered to be on different BACnet networks. In order to communicate with both devices, you will need to run one BACnet Proxy Agent per network.

Each proxy will need to be bound to different ports appropriate for each BACnet network and will need a different VIP identity specified. When configuring drivers you will need to specify which proxy to use by *specifying the VIP identity*.

For example, a proxy connected to the default BACnet network:

```
{  
  "device_address": "192.168.1.2/24"  
}
```

and another on port 47809:

```
{  
  "device_address": "192.168.1.2/24:47809"  
}
```

a device on the first network:

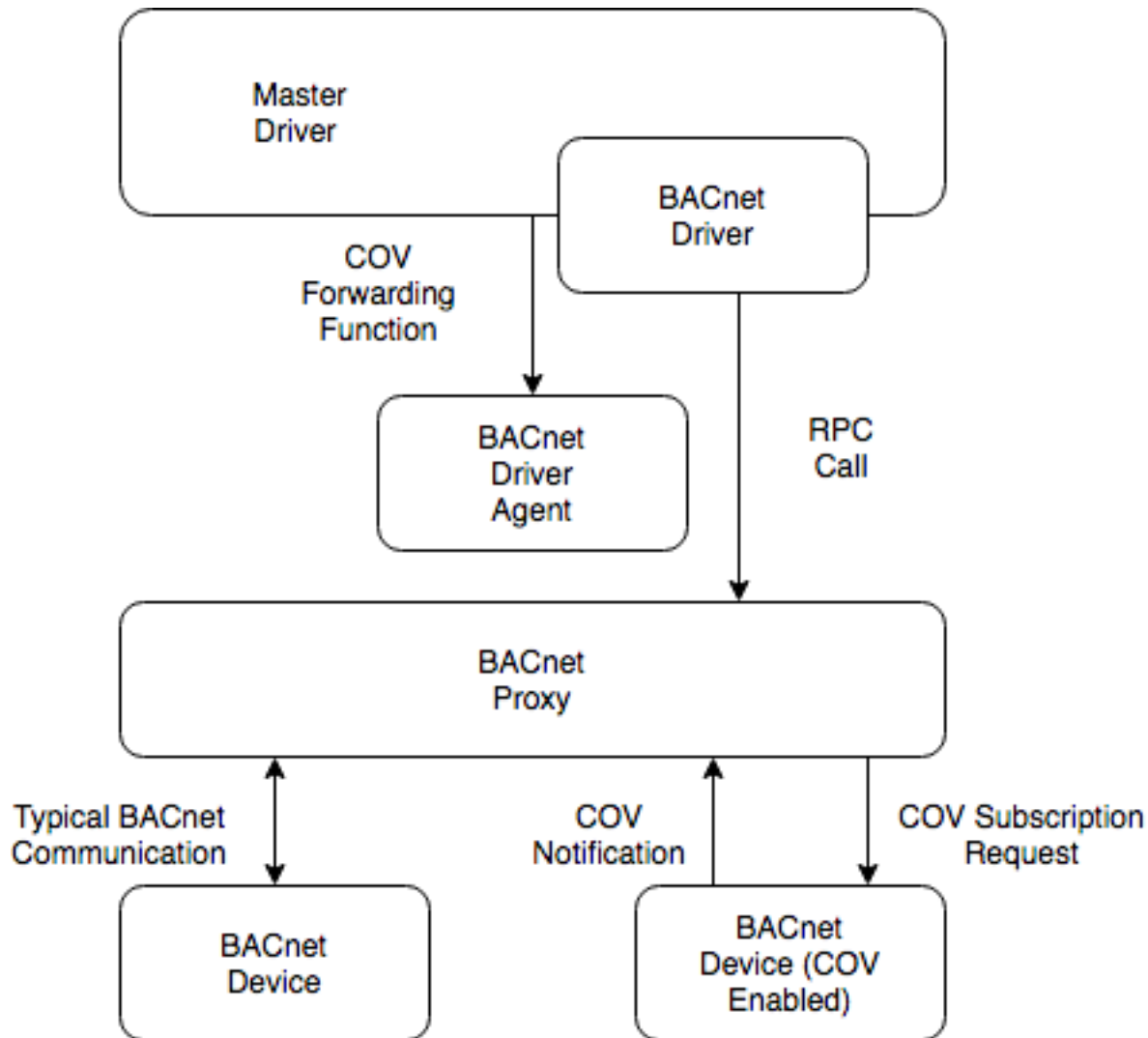
```
{
  "driver_config": {"device_address": "1002:12",
                    "proxy_address": "platform.bacnet_proxy_47808",
                    "timeout": 10},
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/bacnet.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "Heartbeat"
}
```

and a device on the second network:

```
{
  "driver_config": {"device_address": "12000:5",
                    "proxy_address": "platform.bacnet_proxy_47809",
                    "timeout": 10},
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/bacnet.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "Heartbeat"
}
```

Notice that both configs use the same registry configuration (`config://registry_configs/bacnet.csv`). This is perfectly fine as long as the registry configuration is appropriate for both devices. For scraping large numbers of points from a single BACnet device, there is an optional timeout parameter provided, to prevent the platform driver timing out while the BACnet Proxy Agent is collecting points.

## BACnet Change of Value Services



Change of Value Services added in version 0.5 of the BACnet Proxy and version 3.2 of the Platform Driver.

There are a variety of scenarios in which a user may desire data from some BACnet device point values to be published independently of the regular scrape interval. Bacpyes provides a “ChangeOfValueServices” (hereby referred to as ‘COV’) module, which enables a device to push updates to the platform.

The BACnet COV requires that points on the device be properly configured for COV. A point on the BACnet device can be configured with the ‘covIncrement’ property, which determines the threshold for a COV notification (note: this property must be configured by the device operator - VOLTTRON does not provide the ability to set or modify this property).

Based on configuration options for BACnet drivers, the driver will instruct the BACnet Proxy to establish a COV subscription with the device. The subscription will last for an amount of time specified in the driver configuration, and will auto-renew the subscription. If the proxy loses communication with the device or the device driver is stopped the subscription will be removed when the lifetime expires.

While the subscription exists, the device will send (confirmed) notifications to which will be published, with the topic based on the driver’s configured publish topics.

<https://bacpyes.readthedocs.io/en/latest/modules/service/cov.html>

## BACnet Auto-Configuration

Included with the platform are two scripts for finding and configuring BACnet devices. These scripts are located in *scripts/bacnet*. *bacnet\_scan.py* will scan the network for devices. *grab\_bacnet\_config.py* creates a CSV file for the BACnet driver that can be used as a starting point for creating your own register configuration.

Both scripts are configured with the file *BACpypes.ini*.

## Configuring the Utilities

While running both scripts create a temporary virtual BACnet device using the *bacpypes* library. The virtual device must be configured properly in order to work. This configuration is stored in *scripts/bacnet/BACpypes.ini* and will be read automatically when the utility is run.

---

**Note:** The only value that (usually) needs to be changed is the **address** field.

---

<p><b>Warning:</b> This is the address bound to the port on the machine you are running the script from, <b>NOT A TARGET DEVICE</b></p>
---

This value should be set to the IP address of the network interface used to communicate with the remote device. If there is more than one network interface you must use the address of the interface connected to the network that can reach the device.

In Linux you can usually get the addresses bound to all interfaces by running *ifconfig* from the command line.

If a different outgoing port other than the default 47808 must be used, it can be specified as part of the address in the form:

<ADDRESS>:<PORT>
------------------

In some cases, the netmask of the network will be needed for proper configuration. This can be done following this format:

<ADDRESS>/<NETMASK>:<PORT>
----------------------------

where <NETMASK> is the netmask length. The most common value is 24. See <http://www.computerhope.com/jargon/n/netmask.htm>

In some cases, you may also need to specify a different device ID by changing the value of *objectIdentifier* so the virtual BACnet device does not conflict with any devices on the network. *objectIdentifier* defaults to 599.

## Sample BACpypes.ini

<pre>[BACpypes] objectName: Betelgeuse address: 10.0.2.15/24 objectIdentifier: 599 maxAduLengthAccepted: 1024 segmentationSupported: segmentedBoth vendorIdentifier: 15</pre>
---

## Scanning for BACnet Devices

If the addresses for BACnet devices are unknown they can be discovered using the *bacnet\_scan.py* utility.

To run the utility simply execute the following command:

```
python bacnet_scan.py
```

and expect output similar to this:

```
Device Address      = <Address 192.168.1.42>
Device Id           = 699
maxAPDULengthAccepted = 1024
segmentationSupported = segmentedBoth
vendorID            = 15

Device Address      = <RemoteStation 1002:11>
Device Id           = 540011
maxAPDULengthAccepted = 480
segmentationSupported = segmentedBoth
vendorID            = 5
```

## Reading Output

The address where the device can be reached is listed on the *Device Address* line. The BACnet device ID is listed on the *Device Id* line. The remaining lines are informational and not needed to configure the BACnet driver.

For the first example, the IP address 192.168.1.42 can be used to reach the device. The second device is behind a BACnet router and can be reached at 1002:11. See [BACnet router addressing](#).

## BACnet Scan Options

- `--address ADDRESS`: Send the WhoIs request only to a specific address. Useful as a way to ping devices on a network that blocks broadcast traffic.
- `--range LOW/HIGH`: Specify the device ID range for the results. Useful for filtering.
- `--timeout SECONDS`: Specify how long to wait for responses to the original broadcast. This defaults to 5 which should be sufficient for most networks.
- `--csv-out CSV_OUT`: Write the discovered devices to a CSV file. This can be used as input for *grab\_multiple\_configs.py*. See [Scraping Multiple Devices](#).

## Automatically Generating a BACnet Registry Configuration File

A CSV registry configuration file for the BACnet driver can be generated with the *grab\_bacnet\_config.py* script.

**Warning:** This configuration will need to be edited before it can be used!

The utility is invoked with the command:

```
python grab_bacnet_config.py <device id>
```

This will query the device with the matching device ID for configuration information and print the resulting CSV file to the console.

In order to save the configuration to a file use the `--registry-out-file` option to specify the output file name.

Optionally the `--address` option can be used to specify the address of the target. In some cases, this is needed to help establish a route to the device.

## Output and Assumptions

- Attempts at determining if a point is writable proved too unreliable. Therefore all points are considered to be read-only in the output.
- The only property for which a point is setup for an object is *presentValue*.
- By default, the *Volttron Point Name* is set to the value of the *name* property of the BACnet object on the device. In most cases this name is vague. No attempt is made at choosing a better name. A duplicate of *Volttron Point Name* column called *Reference Point Name* is created to so that once *Volttron Point Name* is changed a reference remains to the actual BACnet device object name.
- Meta data from the objects on the device is used to attempt to put useful info in the *Units*, *Unit Details*, and *Notes* columns. Information such as the range of valid values, defaults, the resolution or sensor input, and enumeration or state names are scraped from the device.

With a few exceptions “Units” is pulled from the object’s “units” property and given the name used by the *bacpypes* library to describe it. If a value in the **Units** column takes the form

```
UNKNOWN UNIT ENUM VALUE: <value>
```

then the device is using a nonstandard value for the units on that object.

## Scraping Multiple Devices

The *grab\_multiple\_configs.py* script will use the CSV output of *bacnet\_scan.py* to automatically run *grab\_bacnet\_config.py* on every device listed in the CSV file.

The output is put in two directories. *devices/* contains basic driver configurations for the scrapped devices. *registry\_configs/* contains the registry file generated by *grab\_bacnet\_config.py*.

*grab\_multiple\_configs.py* makes no assumptions about device names or topics, however the output is appropriate for the *install\_platform\_driver\_configs.py* script.

## Grab Multiple Configs Options

- `--out-directory OUT_DIRECTORY` Specify the output directory.
- `--use-proxy` Use *proxy\_grab\_bacnet\_config.py* to gather configuration data.
- `--proxy-id` When using `--use-proxy`, supply `proxy-id` with the VIP identity of a BACnet proxy agent. This is useful for deployments with multiple BACnet proxies, such as on segmented networks, or in deployments communicating with multiple BACnet networks.

## BACnet Proxy Alternative Scripts

Both *grab\_bacnet\_config.py* and *bacnet\_scan.py* have alternative versions called *proxy\_grab\_bacnet\_config.py* and *proxy\_bacnet\_scan.py* respectively. These versions require that the VOLTTRON platform is running and BACnet Proxy agent is running. Both of these agents use the same command line arguments as their independent counterparts.

**Warning:** These versions of the BACnet scripts are intended as a proof of concept and have not been optimized for performance. *proxy\_grab\_bacnet\_config.py* takes about 10 times longer to grab a configuration than *grab\_bacnet\_config.py*

## Problems and Debugging

- Both *grab\_bacnet\_config.py* and *bacnet\_scan.py* creates a virtual device that open up a port for communication with devices. If the BACnet Proxy is running on the VOLTTRON platform it will cause both of these scripts to fail at startup. Stopping the BACnet Proxy will resolve the problem.
- Typically the utility should run quickly and finish in 30 seconds or less. In our testing, we have never seen a successful scrape take more than 15 seconds on a very slow device with many points. Many devices will scrape in less than 3 seconds.
- If the utility has not finished after about 60 seconds it is probably having trouble communicating with the device and should be stopped. Rerunning with debug output can help diagnose the problem.

To output debug messages to the console add the `--debug` switch to the **end** of the command line arguments.

```
python grab_bacnet_config.py <device ID> --out-file test.csv --debug
```

On a successful run you will see output similar to this:

```
DEBUG:<u>main</u>:initialization
DEBUG:<u>main</u>:    - args: Namespace(address='10.0.2.20', buggers=False, debug=[],
↳ ini=<class 'bacypes.consolelogging.ini'>, max_range_report=1e+20, out_file=<open
↳ file 'out.csv', mode 'wb' at 0x901b0d0>)
DEBUG:<u>main</u>.SynchronousApplication:<u>init</u> (<bacypes.app.LocalDeviceObject
↳ object at 0x901de6c>, '10.0.2.15')
DEBUG:<u>main</u>:starting build
DEBUG:<u>main</u>:pduSource = <Address 10.0.2.20>
DEBUG:<u>main</u>:iAmDeviceIdentifier = ('device', 500)
DEBUG:<u>main</u>:maxAPDULengthAccepted = 1024
DEBUG:<u>main</u>:segmentationSupported = segmentedBoth
DEBUG:<u>main</u>:vendorID = 5
DEBUG:<u>main</u>:device_name = MS-NCE2560-0
DEBUG:<u>main</u>:description =
DEBUG:<u>main</u>:objectCount = 32
DEBUG:<u>main</u>:object name = Building/FCB.Local Application.Room Real Temp 2
DEBUG:<u>main</u>: object type = analogInput
DEBUG:<u>main</u>: object index = 3000274
DEBUG:<u>main</u>: object units = degreesFahrenheit
DEBUG:<u>main</u>: object units details = -50.00 to 250.00
DEBUG:<u>main</u>: object notes = Resolution: 0.1
DEBUG:<u>main</u>:object name = Building/FCB.Local Application.Room Real Temp 1
DEBUG:<u>main</u>: object type = analogInput
DEBUG:<u>main</u>: object index = 3000275
DEBUG:<u>main</u>: object units = degreesFahrenheit
```

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```

DEBUG:<u>main</u>: object units details = -50.00 to 250.00
DEBUG:<u>main</u>: object notes = Resolution: 0.1
DEBUG:<u>main</u>:object name = Building/FCB.Local Application.OSA
DEBUG:<u>main</u>: object type = analogInput
DEBUG:<u>main</u>: object index = 3000276
DEBUG:<u>main</u>: object units = degreesFahrenheit
DEBUG:<u>main</u>: object units details = -50.00 to 250.00
DEBUG:<u>main</u>: object notes = Resolution: 0.1
...

```

and will finish something like this:

```

...
DEBUG:<u>main</u>:object name = Building/FCB.Local Application.MOTOR1-C
DEBUG:<u>main</u>: object type = binaryOutput
DEBUG:<u>main</u>: object index = 3000263
DEBUG:<u>main</u>: object units = Enum
DEBUG:<u>main</u>: object units details = 0-1 (default 0)
DEBUG:<u>main</u>: object notes = BinaryPV: 0=inactive, 1=active
DEBUG:<u>main</u>:finally

```

Typically if the BACnet device is unreachable for any reason (wrong IP, network down/unreachable, wrong interface specified, device failure, etc) the scraper will stall at this message:

```

DEBUG:<u>main</u>:starting build

```

If you have not specified a valid interface in BACpypes.ini you will see the following error with a stack trace:

```

ERROR:<u>main</u>:an error has occurred: [Errno 99] Cannot assign requested address
<Python stack trace cut>

```

## BACnet Router Addressing

The underlying library that Volttron uses for BACnet supports IP to MS/TP routers. Devices behind the router use a Remote Station address in the form:

```

<network>:<address>

```

where <network> is the configured network ID of the router and <address> is the address of the device behind the router.

For example to access the device at <address> 12 for a router configured for <network> 1002 can be accessed with this address:

```

1002:12

```

<network> must be number from **0 to 65534** and <address> must be a number from **0 to 255**.

This type of address can be used anywhere an address is required in configuration of the *Volttron BACnet driver*.

## Caveats

VOLTTRON uses a UDP broadcast mechanism to establish the route to the device. If the route cannot be established it will fall back to a UDP broadcast for all communication with the device. If the IP network where the router is connected blocks UDP broadcast traffic then these addresses will not work.

## Chargepoint Driver

### Chargepoint Driver Configuration

The chargepoint driver requires at least one additional python library and has its own *requirements.txt*. Make sure to run:

```
pip install -r <chargepoint driver path>/requirements.txt
```

before using this driver.

### driver\_config

There are three arguments for the **driver\_config** section of the device configuration file:

- **stationID** - Chargepoint ID of the station. This format is usually '1:00001'
- **username** - Login credentials for the Chargepoint API
- **password** - Login credentials for the Chargepoint API

The Chargepoint login credentials are generated in the Chargepoint web portal and require a Chargepoint account with sufficient privileges. Station IDs are also available on the web portal.

Here is an example device configuration file:

```
{
  "driver_config": {"stationID": "3:12345",
                    "username":
→ "4b90fc0ae5fe8b6628e50af1215d4fcf5743a6f3c63ee1464012875",
                    "password": "ebaf1a3cdfb80baf5b274bdf831e2648"},
  "driver_type": "chargepoint",
  "registry_config": "config://chargepoint.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

A sample Chargepoint configuration file can be found in the VOLTTRON repository in *examples/configurations/drivers/chargepoint1.config*

## Chargepoint Registry Configuration File

The registry configuration file is a [CSV](#) file. Each row configures a point on the device.

The following columns are required for each row:

- **Volttron Point Name** - The name by which the platform and agents running on the platform will refer to this point.
- **Attribute Name** - Chargepoint API attribute name. This determines the field that will be read from the API response and must be one of the allowed values.
- **Port #** - If the point describes a specific port on the Chargestation, it is defined here. (Note 0 and an empty value are equivalent.)
- **Type** - Python type of the point value.
- **Units** - Used for meta data when creating point information on the historian.
- **Writable** - Either “TRUE” or “FALSE”. Determines if the point can be written to. Only points labeled TRUE can be written.
- **Notes** - Miscellaneous notes field.
- **Register Name** - A string representing how to interpret the data register. Acceptable values are:
  - StationRegister
  - StationStatusRegister
  - LoadRegister
  - AlarmRegister
  - StationRightsRegister
- **Starting Value** - Default value for writeable points. Read-only points should not have a value in this column.

Detailed descriptions for all available Chargepoint registers may be found in the `README.rst` in the Chargepoint driver directory.

A sample Chargepoint registry file can be found in the VOLTTRON repository in `examples/configurations/drivers/chargepoint.csv`

## Chargepoint API Driver Specification

Spec Version 1.1

[ChargePoint](#) operates the largest independently owned EV charging network in the US. It sells charge stations to businesses and provides a web application to manage and report on these Chargestations. Chargepoint offers a [Web Services API](#) that its customers may use to develop applications that integrate with the Chargepoint network devices.

The Chargepoint API Driver for VOLTTRON will enable real-time monitoring and control of Chargepoint EVSEs within the VOLTTRON platform by creating a standard VOLTTRON device driver on top of the Chargepoint Web Services API. Each port on each managed Chargestation will look like a standard VOLTTRON device, monitored and controlled through the VOLTTRON device driver interface.

## Driver Scope & Functions

This driver will enable VOLTTTRON to support the following use cases with Chargepoint EVSEs:

- Monitoring of Chargestation status, load and energy consumption
- Demand charge reduction
- Time shifted charging
- Demand response program participation

The data and functionality to be made available through the driver interface will be implemented using the following Chargepoint web services:

API Method Name	Key Data/Function Provided
getStationStatus	Port status: AVAILABLE, INUSE, UNREACHABLE, UNKNOWN
shedLoad	Limit station power by percent or max load for some time period.
clearShedState	Clear all shed state and allow normal charging
getLoad	Port load in Kw, shedState, allowedLoad, percentShed
getAlarms	Only the last alarm will be available.
clearAlarms	Clear all alarms.
getStationRights	Name of station rights profile, eg. 'network_manager'
getChargingSessionData	Energy used in last session, start/end timestamps
getStations	Returns description/address/nameplate of chargestation.

The Chargepoint Driver will implement version 5.0 Rev 7 of the Chargepoint API. While the developer's guide is not yet publicly available, the WSDL Schema is.

---

**Note:** Station Reservation API has been removed from the 5.0 version of the API.\*

---

WSDL for this API is located here:

[https://webservices.chargepoint.com/cp\\_api\\_5.0.wsdl](https://webservices.chargepoint.com/cp_api_5.0.wsdl)

## Mapping VOLTTTRON Device Interface to Chargepoint APIs

The VOLTTTRON driver interface represents a single device as a list of registers accessed through a simple *get\_point/set\_point* API. In contrast, the Chargepoint web services for real-time monitoring and control are spread across eight distinct APIs that return hierarchical XML. The Chargepoint driver is the adaptor that will make a suite of web services look like a single VOLTTTRON device.

### Device Mapping

The Chargepoint driver will map a single VOLTTTRON device (a driver instance) to one Chargestation. Since a Chargestation can have multiple ports, each with their own set of telemetry, the registry will include a port index column on attributes that are specific to a port. This will allow deployments to use an indexing convention that has been followed with other drivers. (See Registry Configuration for more details)

## Requirements

The Chargepoint driver requires at least one additional Python library and has its own *requirements.txt*. Make sure to run

```
pip install -r <chargepoint driver path>/requirements.txt
```

before using this driver.

## Driver Configuration

Each device must be configured with its own driver configuration file. The driver configuration must reference the registry configuration file, defining the set of points that will be available from the device. For Chargestation devices, the *driver\_config* entry of the driver Configuration file will need to contain all parameters required by the web service API:

Parameter	Purpose
username	Credentials established through Chargepoint account
password	
stationID	Unique station ID assigned by chargepoint

The *driver\_type* must be *chargepoint*

A sample driver configuration file for a single device, looks like this:

```
{
  "driver_config": {
    "username" : "1b905c936af141b98f9b0f816087f3605a30c1df1d07f146281b151",
    "password" : "**Put your chargepoint API passqword here**",
    "stationID" : "1:34003",
  },
  "driver_type": "chargepoint",
  "registry_config": "config://chargepoint.csv",
  "interval": 60,
  "heart_beat_point": "heartbeat"
}
```

## API Plans & Access Rights

Chargepoint offers API plans that vary in available features and access rights. Some of the API calls to be implemented here are not available across all plans. Furthermore, the attributes returned in response to an API call may be limited by the API plan and access rights associated with the *userid*. Runtime exceptions related to plans and access rights will generate *DriverInterfaceError* exceptions. These can be avoided by using a registry configuration that does not include APIs or attributes that are not available to the *<username>*.

## Registry Configuration

The registry file defines the individual points that will be exposed by the Chargepoint driver. It should only reference points that will actually be used since each point is potentially an additional web service call. The driver will be smart and limit API calls to those that are required to satisfy the points found in the CSV.

Naming of points will conform to the conventions established by the Chargepoint web services API whenever possible. Note that Chargepoint naming conventions are camel-cased with no spaces or hyphens. Multi-word names start with a lowercase letter. Single word names start uppercase.

The available registry entries for each API method name are shown below along with a description of any notable behavior associated with that register. Following that is a sample of the associated XML returned by the API.

### getStationStatus

The *getStationStatus* query returns information for all ports on the Chargestation.

**Note:** In all the registry entries shown below, the **Attribute Name** column defines the unique name within the Chargepoint driver that must be used to reference this particular attribute and associated API. The **VOLTTRON point name** usually matches the **Attribute Name** in these examples but may be changed during deployment.

Table 20: getStationStatus

Volttron Point Name	At-tribute Name	Register Name	Port #	Type	Units	Start-ing Value	Writable	Notes
Status	Status	Station-Status-Register	1	string			FALSE	AVAILABLE, INUSE, UNREACHABLE, UNKNOWN
Status.Timestamp	TimeS-tamp	Station-Status-Register	1	date-time			FALSE	Timestamp of the last communication between the station and Charge-Point

Sample XML returned by *getStationStatus*.

```
<ns1:getStationStatusResponse xmlns:ns1="urn:dictionary:com.chargepoint.webservices">
  <responseCode>100</responseCode>
  <responseText>API input request executed successfully.</responseText>
  <stationData>
    <stationID>1:33923</stationID>
    <Port>
      <portNumber>1</portNumber>
      <Status>AVAILABLE</Status>
      <TimeStamp>2016-11-07T19:19:19Z</TimeStamp>
    </Port>
    <Port>
      <portNumber>2</portNumber>
      <Status>INUSE</Status>
      <TimeStamp>2016-11-07T19:19:19Z</TimeStamp>
    </Port>
  </stationData>
  <moreFlag>0</moreFlag>
</ns1:getStationStatusResponse>
```

**getLoad, shedLoad, clearShedState**

Reading any of these values will return the result of a call to *getLoad*. Writing *shedState=True* will call *shedLoad* and pass the last written value of *allowedLoad* or *percentShed*. The API allows only one of these two values to be provided. Writing to *allowedLoad* will simultaneously set *percentShed* to None and vice versa.

Table 21: getLoad, shedLoad, clearShedState

Volttron Point Name	Attribute Name	Register Name	Port #	Type	Units	Starting Value	Writable	Notes
shedState	shedState	Load-Register	1	integer	0 or 1	0	TRUE	True when load shed limits are in place
portLoad	portLoad	Load-Register	1	float	kw		FALSE	Load in kw
allowedLoad	allowedLoad	Load-Register	1	float	kw		TRUE	Allowed load in kw when shedState is True
percentShed	percentShed	Load-Register	1	integer	percent		TRUE	Percent of max power shed when shedState is True

Sample XML returned by *getLoad*

```
<ns1:getLoadResponse xmlns:ns1="urn:dictionary:com.chargepoint.webservices">
  <responseCode>100</responseCode>
  <responseText>API input request executed successfully.</responseText>
  <numStations></numStations>
  <groupName></groupName>
  <sgLoad></sgLoad>
  <stationData>
    <stationID>1:33923</stationID>
    <stationName>ALCOGARSTATIONS / ALCOPARK 8 -005</stationName><Address>165 13th
    ↪ St, Oakland, California, 94612, United States</Address>
    <stationLoad>3.314</stationLoad>
    <Port>
      <portNumber>1</portNumber>
      <userID></userID>
      <credentialID></credentialID>
      <shedState>0</shedState>
      <portLoad>0.000</portLoad>
      <allowedLoad>0.000</allowedLoad>
      <percentShed>0</percentShed>
    </Port>
    <Port>
      <portNumber>2</portNumber>
      <userID>664719</userID>
      <credentialID>CNCP0000481668</credentialID>
      <shedState>0</shedState>
      <portLoad>3.314</portLoad>
      <allowedLoad>0.000</allowedLoad>
      <percentShed>0</percentShed>
    </Port>
  </stationData>
</ns1:getLoadResponse>
```

Sample *shedLoad* XML query to set the allowed load on a port to 3.0kw.

```

<ns1:shedLoad>
  <shedQuery>
    <shedStation>
      <stationID>1:123456</stationID>
      <Ports>
        <Port>
          <portNumber>1</portNumber>
          <allowedLoadPerPort>3.0</allowedLoadPerPort>
        </Port>
      </Ports>
    </shedStation>
    <timeInterval/>
  </shedQuery>
</ns1:shedLoad>

```

### getAlarms, clearAlarms

The *getAlarms* query returns a list of all alarms since last cleared. The driver interface will only return data for the most recent alarm, if present. While the *getAlarm* query provides various station identifying attributes, these will be made available through registers associated with the *getStations* API. If an alarm is not specific to a particular port, it will be associated with all Chargestation ports and available through any of its device instances.

Write `True` to *clearAlarms* to submit the *clearAlarms* query to the **chargestation**. It will clear alarms across all ports on that Chargestation.

Table 22: getAlarms, clearAlarms

Volttron Point Name	Attribute Name	Register Name	Port #	Type	Units	Starting Value	Writable	Notes
alarmType	alarm-Type	Alarm-Register		string			FALSE	eg. 'GFCI Trip'
alarmTime	alarm-Time	Alarm-Register		date-time			FALSE	
clearAlarms	clear-Alarms	Alarm-Register		int		0	TRUE	Sends the clearAlarms query when set to True

```

<Alarms>
  <stationID>1:33973</stationID>
  <stationName>ALCOGARSTATIONS / ALCOPARK 8 -003</stationName>
  <stationModel>CT2100-HD-CCR</stationModel>
  <orgID>1:ORG07225</orgID>
  <organizationName>Alameda County</organizationName>
  <stationManufacturer></stationManufacturer>
  <stationSerialNum>115110013418</stationSerialNum>
  <portNumber></portNumber>
  <alarmType>Reachable</alarmType>
  <alarmTime>2016-09-26T12:19:16Z</alarmTime>
  <recordNumber>1</recordNumber>
</Alarms>

```



## getStationRights

Returns the name of the stations rights profile. A station may have multiple station rights profiles, each associated with a different station group ID. For this reason, the *stationRightsProfile* register will return a dictionary of (*sgID*, *name*) pairs. Since this is a Chargestation level attribute, it will be returned for all ports.

Table 23: getStationRights

Volttron Point Name	Attribute Name	Register Name	Port #	Type	Units	Starting Value	Writable	Notes
stationRight-sProfile	station-RightsPro-file	Station-RightsReg-ister		dic-tio-nary			FALSE	Dictionary of sgID, rights name tuples.

```

<rightsData>
  <sgID>39491</sgID>
  <sgName>AlcoPark 8</sgName>
  <stationRightsProfile>network_manager</stationRightsProfile>
  <stationData>
    <stationID>1:34003</stationID>
    <stationName>ALCOGARSTATIONS / ALCOPARK 8 -004</stationName>
    <stationSerialNum>115110013369</stationSerialNum>
    <stationMacAddr>000D:6F00:0154:F1FC</stationMacAddr>
  </stationData>
</rightsData>
<rightsData>
  <sgID>58279</sgID>
  <sgName>AlcoGarageStations</sgName>
  <stationRightsProfile>network_manager</stationRightsProfile>
  <stationData>
    <stationID>1:34003</stationID>
    <stationName>ALCOGARSTATIONS / ALCOPARK 8 -004</stationName>
    <stationSerialNum>115110013369</stationSerialNum>
    <stationMacAddr>000D:6F00:0154:F1FC</stationMacAddr>
  </stationData>
</rightsData>

```

## getChargingSessionData

Like *getAlarms*, this query returns a list of session data. The driver interface implementation will make the last session data available.

Table 24: getChargingSessionData

Volttron Point Name	Attribute Name	Register Name	Port #	Type	Units	Starting Value	Writable	Notes
sessionID	sessionID	ChargingSession-Register	1	string			FALSE	
startTime	startTime	ChargingSession-Register	1	date-time			FALSE	
endTime	endTime	ChargingSession-Register	1	date-time			FALSE	
Energy	Energy	ChargingSession-Register	1	float			FALSE	
rfdSerialNum-ber	rfdSerialNum-ber	ChargingSession-Register	1	string			FALSE	
driverAccount-Number	driverAccount-Number	ChargingSession-Register	1	string			FALSE	
driverName	driverName	ChargingSession-Register	1	string			FALSE	

```

<ChargingSessionData>
  <stationID>1:34003</stationID>
  <stationName>ALCOGARSTATIONS / ALCOPARK 8 -004</stationName>
  <portNumber>2</portNumber>
  <Address>165 13th St, Oakland, California, 94612, United States</Address>
  <City>Oakland</City>
  <State>California</State>
  <Country>United States</Country>
  <postalCode>94612</postalCode>
  <sessionID>53068029</sessionID>
  <Energy>12.120572</Energy>
  <startTime>2016-10-25T15:53:35Z</startTime>
  <endTime>2016-10-25T20:14:46Z</endTime>
  <userID>452777</userID>
  <recordNumber>1</recordNumber>
  <credentialID>490178743</credentialID>
</ChargingSessionData>

```

## getStations

This API call returns a complete description of the Chargestation in 40 fields. This information is essentially static and will change infrequently. It should not be scraped on a regular basis. The list of attributes will be included in the registry CSV but are only listed here:

```

stationID, stationManufacturer, stationModel, portNumber, stationName, stationMacAddr,
↪ stationSerialNum, Address, City,
State, Country, postalCode, Lat, Long, Reservable, Level, Mode, Connector, Voltage, ↪
↪ Current, Power, numPorts, Type,
startTime, endTime, minPrice, maxPrice, unitPricePerHour, unitPricePerSession, ↪
↪ unitPricePerKWh, unitPricePerHourThereafter,
sessionTime, Description, mainPhone, orgID, organizationName, sgID, sgName, ↪
↪ currencyCode

```

## Engineering Discussion

### Questions

- **Allowed python-type** - We propose a register with a *python-type* of dictionary. Is this OK?
- **Scrape Interval** - Scrape all should not return all registers defined in the CSV, we propose fine grained control with a scrape-interval on each register. Response: ok to add extra settings to registry but don't worry about publishing static data with every scrape
- **Data currency** - Since devices are likely to share api calls, at least across ports, we need to think about the currency of the data and possibly allowing this to be a configurable parameter or derived from the scrape interval . Response: add to CSV with default values if not present

### Performance

Web service calls across the internet will be significantly slower than typical VOLTTRON Bacnet or Modbus devices. It may be prohibitively expensive for each Chargepoint sub-agent instance to make individual requests on behalf of its own EVSE+port. We will need to examine the possibility of making a single request for all active Chargestations and sharing that information across driver instances. This could be done through a separate agent that regularly queries the Chargepoint network and makes the data available to each sub-agent via an RPC call.

### 3rd Party Library Dependencies

The Chargepoint driver implementation will depend on one additional 3rd part library that is not part of a standard VOLTTRON installation:

<https://pypi.org/project/suds-jurko/>

Is there a mechanism for drivers to specify their own requirements.txt ?

Driver installation and configuration documentation can reference requirement.txt

### DNP3 Driver

VOLTTRON's DNP3 driver enables the use of **DNP3** (Distributed Network Protocol) communications, reading and writing points via a DNP3 Outstation.

In order to use a DNP3 driver to read and write point data, VOLTTRON's DNP3 Agent must also be configured and running. All communication between the VOLTTRON Outstation and a DNP3 Master happens through the DNP3 Agent.

For information about the DNP3 Agent, please see the *DNP3 Platform Specification*.

## Requirements

The DNP3 driver requires the PyDNP3 package. This package can be installed in an activated environment with:

```
pip install pydnp3
```

## Driver Configuration

There is one argument for the “driver\_config” section of the DNP3 driver configuration file:

- **dnp3\_agent\_id** - ID of VOLTTRON’s DNP3Agent.

Here is a sample DNP3 driver configuration file:

```
{
  "driver_config": {
    "dnp3_agent_id": "dnp3agent"
  },
  "campus": "campus",
  "building": "building",
  "unit": "dnp3",
  "driver_type": "dnp3",
  "registry_config": "config://dnp3.csv",
  "interval": 15,
  "timezone": "US/Pacific",
  "heart_beat_point": "Heartbeat"
}
```

A sample DNP3 driver configuration file can be found in the VOLTTRON repository in `services/core/PlatformDriverAgent/example_configurations/test_dnp3.config`.

## DNP3 Registry Configuration File

The driver’s registry configuration file, a [CSV](#) file, specifies which DNP3 points the driver will read and/or write. Each row configures a single DNP3 point.

The following columns are required for each row:

- **Volttron Point Name** - The name used by the VOLTTRON platform and agents to refer to the point.
- **Group** - The point’s DNP3 group number.
- **Index** - The point’s index number within its DNP3 data type (which is derived from its DNP3 group number).
- **Scaling** - A factor by which to multiply point values.
- **Units** - Point value units.
- **Writable** - TRUE or FALSE, indicating whether the point can be written by the driver (FALSE = read-only).

Consult the **DNP3 data dictionary** for a point’s Group and Index values. Point definitions in the data dictionary are by agreement between the DNP3 Outstation and Master. The VOLTTRON DNP3Agent loads the data dictionary of point definitions from the JSON file at “point\_definitions\_path” in the DNP3Agent’s config file.

A sample data dictionary is available in `services/core/DNP3Agent/dnp3/mesa_points.config`.

Point definitions in the DNP3 driver’s registry should look something like this:

Table 25: DNP3

Volttron Point Name	Group	Index	Scaling	Units	Writable
DCHD.WTgt	41	65	1.0	NA	FALSE
DCHD.WTgt-In	30	90	1.0	NA	TRUE
DCHD.WinTms	41	66	1.0	NA	FALSE
DCHD.RmpTms	41	67	1.0	NA	FALSE

A sample DNP3 driver registry configuration file is available in `services/core/PlatformDriverAgent/example_configurations/dnp3.csv`.

## Ecobee Driver

The Ecobee driver is an implementation of a *VOLTRON driver framework* Interface. In this case, the Platform Driver issues commands to the Ecobee driver to collect data from and send control signals to [Ecobee’s remote web API](#)

---

**Note:** Reading the driver framework and driver configuration documentation prior to following this guide will help the user to understand drivers, driver communication, and driver configuration files.

---

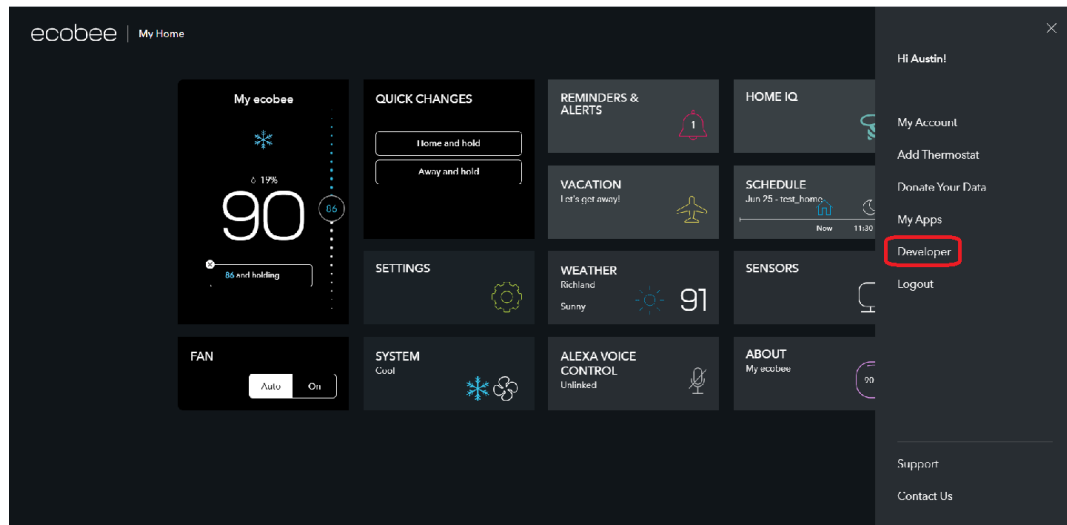
This guide covers:

- Creating an Ecobee application via the web interface
- Creating an Ecobee driver configuration file, including finding the user’s Ecobee API key and Ecobee thermostat serial number
- Creating an Ecobee registry configuration file
- Installing the Platform Driver and loading Ecobee driver and registry configurations
- Starting the driver and viewing Ecobee data publishes

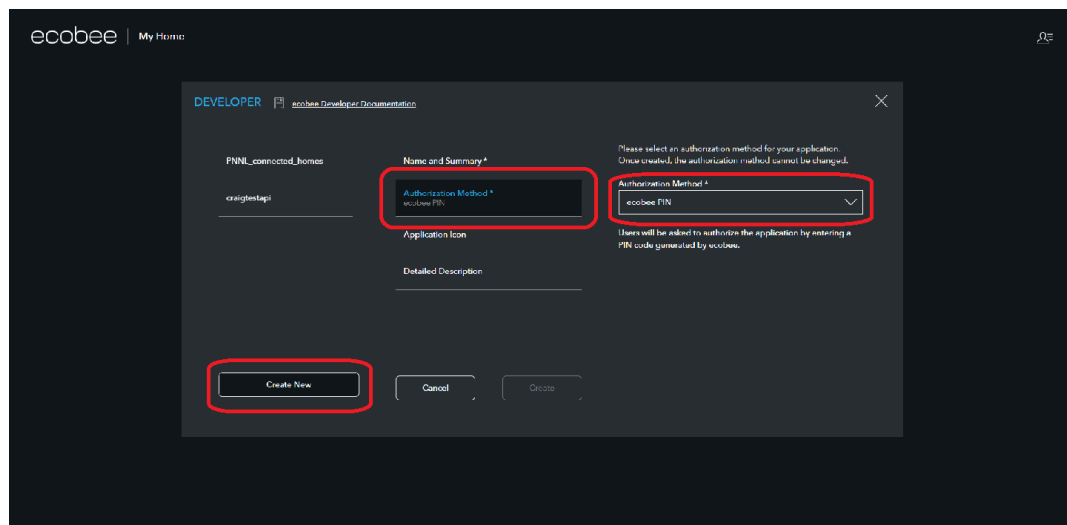
## Ecobee Application

Connecting the Ecobee driver to the Ecobee API requires configuring your account with an Ecobee application.

1. Log into the [Ecobee site](#)
2. Click on the “hamburger” icon on the right to open the account menu, then click “Developer”



3. On the bottom-left corner of the screen that appears, click “Create New”



4. Fill out the name, summary, and description forms as desired. Click “Authorization Method” and from the drop-down that appears, select “ecobee PIN” (this will enable an extra layer of authentication to protect your account)
5. Record the API key for the Application from the Developer menu

## Configuration Files

The Ecobee driver uses two configuration files, a driver configuration which sets the parameters of the behavior of the driver, and registry configuration which instructs the driver on how to interact with each point.

This is an example driver configuration:

```
{
  "driver_config": {
    "API_KEY": "abc123",
```

(continues on next page)

The screenshot shows a web interface for managing applications. On the left, a sidebar contains a button labeled 'myApp'. The main content area is divided into two columns. The left column has four sections: 'Name and Summary \*', 'Authorization Method \*' (with 'ecobee PIN' selected), 'Application Icon', and 'Detailed Description'. The right column contains 'Application name:' (myApp), 'Application summary \*' (myApp), 'API key:' (blbfbotAxTwKs7jBYSQIVEAovlrhJZeC, which is circled in red), and 'Installs: 0'. At the bottom, there are three buttons: 'Create New', 'Revoke', and 'Save'.

Fig. 1: From Ecobee authentication docs

(continued from previous page)

```

    "DEVICE_ID": 8675309
  },
  "driver_type": "ecobee",
  "registry_config": "config://campus/building/ecobee.csv",
  "interval": 180,
  "timezone": "UTC"
}

```

The driver configuration works as follows:

Table 26: Driver Configuration Description

Con-fig Field	Description
driver_config	This section specifies values used by the driver agent during operation
API_KEY	This is the User's API key. This must be obtained by the user from the Ecobee web UI and provided in this part of the configuration. Notes on how to do this will be provided below
DEVICE_ID	This is the device number of the Ecobee thermostat the driver is responsible for operating. This must be obtained by the user from the Ecobee web UI. Notes on how to do this will be provided below
driver_type	This value should match the name of the python file which contains the interface class implementation for the Ecobee driver and should not change
registry_config	This should be a user specified path of the form "config://<path>". It is recommended to use the device topic following "devices" with the file extension ("config://<campus>/<building?/>ecobee.csv") to help the user keep track of configuration pairs in the store. This value must be used when storing the config (see installation step below)
interval	This should specify the time in seconds between publishes to the message bus by the Platform Driver for the Ecobee driver (Note: the user can specify an interval for the Ecobee driver which is shorter than 180 seconds, however Ecobee API data is only updated at 180 second intervals, so old data will be published if a scrape occurs between updates.)
timezone	Timezone to use for publishing timestamps. This value should match the <a href="#">timezone from the Ecobee device</a>

**Note:** Values for API\_KEY and DEVICE\_ID must be obtained by the user. DEVICE\_ID should be added as an integer representation of the thermostat's serial number.

### Getting API Key

Ecobee API keys require configuring an application using the Ecobee web UI. For more information on configuring an application and obtaining the API key, please refer to the [Ecobee Application](#) heading in this documentation.

### Finding Device Identifier

To find your Ecobee thermostat's device identifier:

1. Log into the [Ecobee customer portal](#)
2. From the Home screen click "About My Ecobee"
3. The thermostat identifier is the serial number listed on the About screen

## Registry Configuration

This file specifies how data is read from Ecobee API response data as well as how points are set via the Platform Driver and actuator.

It is likely that more points may be added to obtain additional data, but barring implementation changes by Ecobee it is unlikely that the values in this configuration will need to change substantially, as most thermostats provide the same range of data in a similar format.

This is an example registry configuration:



Table 27: Registry Configuration Example

Point Name	Volttron Point Name	Units	Type	Write-able	Read-able	Default Value	Notes
fanMinOnTime	fanMinOnTime	seconds	setting	True	True		
hvacMode	hvacMode	seconds	setting	True	True		
humidity	humidity	%	setting	False	True		
coolHoldTemp	coolHoldTemp	degF	hold	True	False		
heatHoldTemp	heatHoldTemp	degf	hold	True	False		
actualTemperature	ActualTemperature	degF	hold	False	True		

This configuration works as follows:

Table 28: Registry Configuration Description

Config Field	Description
Point Name	Name of a point as it appears in Ecobee response data (example below)
Volttron Point Name	Name of a point as a user would like it to be displayed in data publishes to the message bus
Units	Unit of measurement specified by remote API
Type	The Ecobee driver registry configuration supports ‘setting’ and ‘hold’ register types, based on how the data is represented in Ecobee response data (example below)
Writable	Whether or not the point is able to be written to. This may be determined by what Ecobee allows, and by the operation of Ecobee’s API (to set an Ecobee cool/heat hold, cool/HoldTemp is used, but to read other data points are used and therefore are not writable; this is a quirk of Ecobee’s API)
Read-able	Whether or not the point is able to be read as specified. This may be determined by what Ecobee allows, and by the operation of Ecobee’s API (to set an Ecobee cool/heat hold, cool/HoldTemp is used, however the requested hold values are represented as desiredCool/Heat in Ecobee’s response data; this is a quirk of Ecobee’s API)
De-fault Value	Used to send device defaults to the Ecobee API, this is optional
Notes	Any user specified notes, this is optional

An example registry configuration containing all points from the development device is available in the *examples/configurations/drivers/ecobee.csv* file in the VOLTRON repository.

For additional explanation on the quirks of Ecobee’s readable/writable points, visit: <https://www.ecobee.com/home/developer/api/documentation/v1/functions/SetHold.shtml>

## Installation

The following instructions make up the minimal steps required to set up an instance of the Ecobee driver on the VOLTTRON platform and connect it to the Ecobee remote API:

1. Create a directory using the path `$VOLTTRON_ROOT/configs` and create two files, *ecobee.csv* and *ecobee.config*. Copy the registry config to the *ecobee.csv* file and the driver config to the *ecobee.config* file. Modify the *API\_KEY* and *DEVICE\_ID* fields from the driver config with your own API key and device serial number.

2. If the platform has not been started:

```
./start-volttron
```

3. Be sure that the environment has been activated - you should see (volttron) next to <user>@<host> in your terminal window. To activate an environment, use the following command.

```
source env/bin/activate
```

4. Install a Platform Driver if one is not yet installed

```
python scripts/install-agent.py --agent-source services/core/  
↳PlatformDriverAgent --config \  
examples/configurations/drivers/platform-driver.agent --tag platform.  
↳driver
```

5. Load the driver configuration into the configuration store (“vctl config list platform.driver” can be used to show installed configurations)

```
vctl config store platform.driver devices/campus/building/ecobee  
↳$VOLTTRON_ROOT/configs/ecobee.config
```

6. Load the driver’s registry configuration into the configuration store

```
vctl config store platform.driver campus/building/ecobee.csv $VOLTTRON_  
↳ROOT/configs/ecobee.csv --csv
```

7. Start the platform driver

```
vctl start platform.driver
```

At this point, the platform driver will start, configure the driver agent, and data should start to publish on the publish interval.

---

**Note:** If starting the driver for the first time, or if the authorization which is managed by the driver is out of date, the driver will perform some additional setup internally to authenticate the driver with the Ecobee API. This stage will require the user enter a pin provided in the *volttron.log* file to the Ecobee web UI. The Ecobee driver has a wait period of 60 seconds to allow users to enter the pin code into the Ecobee UI. Instructions for pin verification follow.

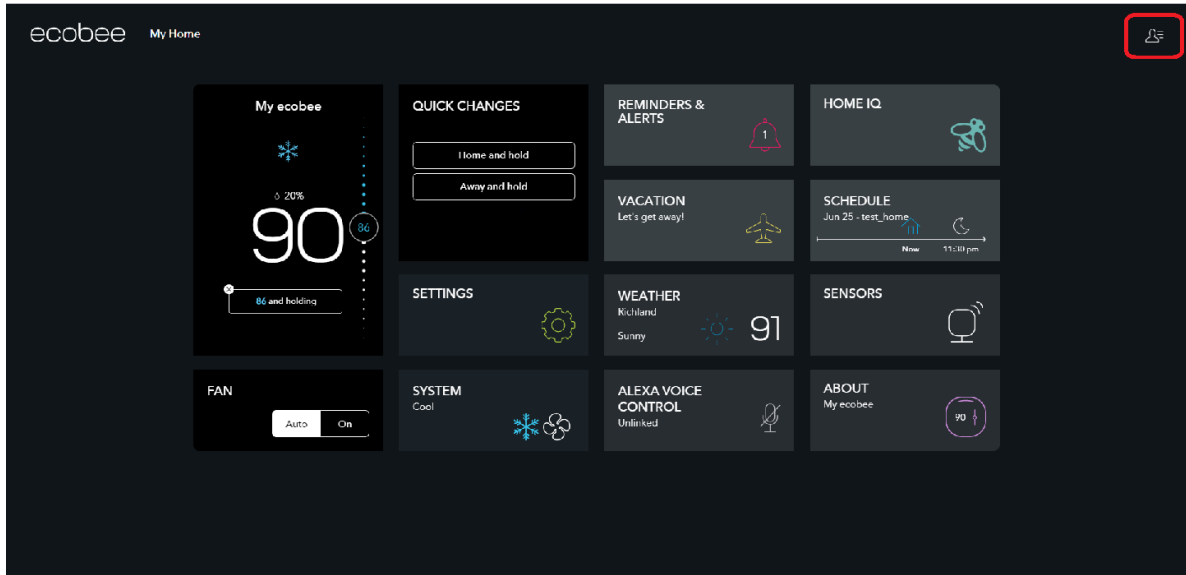
---

**PIN Verification steps:**

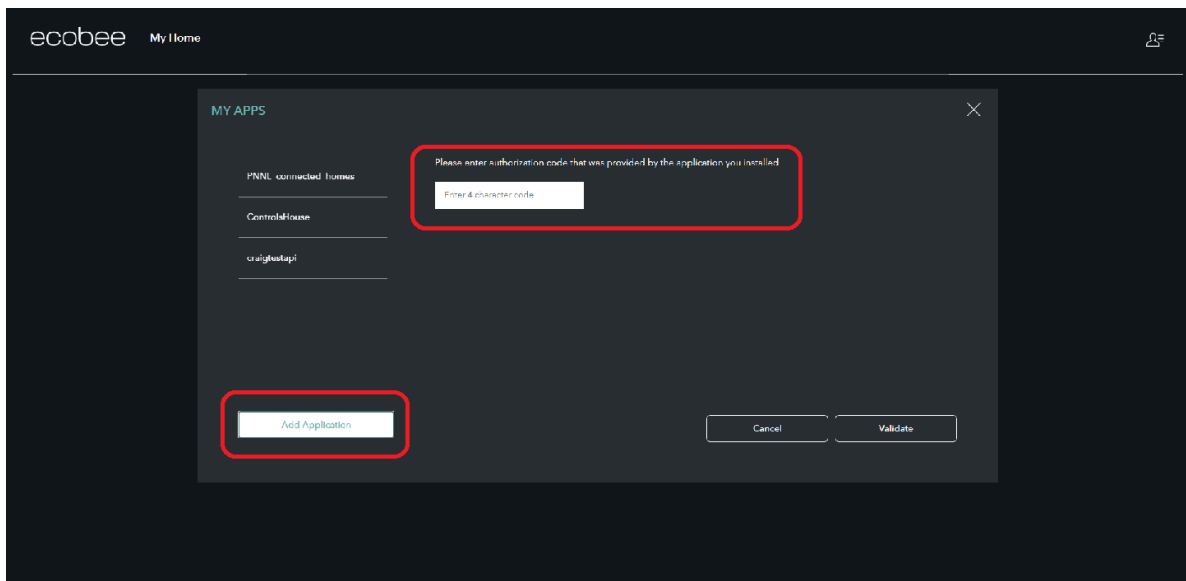
1. Obtain the pin from the VOLTTTRON logs. The pin is a 4 character long string in the logs flanked by 2 rows of asterisks

```
master_driver.interfaces.ecobee WARNING: *****
master_driver.interfaces.ecobee WARNING: Please authorize your Ecobee developer app with PIN code ia2i.
master_driver.interfaces.ecobee WARNING: *****
```

2. Log into the [Ecobee UI](#) . After logging in, the customer dashboard will be brought up, which features a series of panels (where the serial number was found for device configuration) and a “hamburger” menu.



3. Add the application: Click the “hamburger” icon which will display a list of items in a panel that becomes visible on the right. Click “My Apps”, then “Add application”. A text form will appear, enter the pin provided in VOLTTTRON logs here, then click “validate” and “add application”.



This will complete the pin verification step.

## Ecobee Driver Usage

At the configured interval, the platform driver will publish a JSON object with data obtained from Ecobee based on the provided configuration files.

To view the publishes in the *volttron.log* file, install and start a ListenerAgent:

```
python scripts/install-agent.py -s examples/ListenerAgent
```

The following is an example publish:

```
'Status': [''],
'Vacations': [{
    'coolHoldTemp': 780,
    'coolRelativeTemp': 0,
    'drRampUpTemp': 0,
    'drRampUpTime': 3600,
    'dutyCyclePercentage': 255,
    'endDate': '2020-03-29',
    'endTime': '08:00:00',
    'fan': 'auto',
    'fanMinOnTime': 0,
    'heatHoldTemp': 660,
    'heatRelativeTemp': 0,
    'holdClimateRef': '',
    'isCoolOff': False,
    'isHeatOff': False,
    'isOccupied': False,
    'isOptional': True,
    'isTemperatureAbsolute': True,
    'isTemperatureRelative': False,
    'linkRef': '',
    'name': 'Skiing',
    'occupiedSensorActive': False,
    'running': False,
    'startDate': '2020-03-15',
    'startTime': '20:00:00',
    'type': 'vacation',
    'unoccupiedSensorActive': False,
    'vent': 'off',
    'ventilatorMinOnTime': 5}],
'actualTemperature': 720,
'desiredCool': 734,
'desiredHeat': 707,
'fanMinOnTime': 0,
'humidity': '36',
'hvacMode': 'off',
{'Programs': {'type': 'custom', 'tz': 'UTC', 'units': None},
'Status': {'type': 'list', 'tz': 'UTC', 'units': None},
'Vacations': {'type': 'custom', 'tz': 'UTC', 'units': None},
'actualTemperature': {'type': 'integer', 'tz': 'UTC', 'units': 'degF'},
'coolHoldTemp': {'type': 'integer', 'tz': 'UTC', 'units': 'degF'},
'desiredCool': {'type': 'integer', 'tz': 'UTC', 'units': 'degF'},
'desiredHeat': {'type': 'integer', 'tz': 'UTC', 'units': 'degF'},
'fanMinOnTime': {'type': 'integer', 'tz': 'UTC', 'units': 'seconds'},
'heatHoldTemp': {'type': 'integer', 'tz': 'UTC', 'units': 'degF'},
'humidity': {'type': 'integer', 'tz': 'UTC', 'units': '%'},
'hvacMode': {'type': 'bool', 'tz': 'UTC', 'units': 'seconds'}}
```

Individual points can be obtained via JSON RPC on the VOLTTRON Platform. In an agent:

```
self.vip.rpc.call("platform.driver", "get_point", <device topic>, <kwargs>)
```

## Set\_point Conventions

**Note:** Examples from this section are from Ecobee’s documentation.

The Ecobee Web API requires a variety of objects to be supplied for the various functionalities: setting a hold, adding a vacation and adding a program require creating a JSON object. Each object is described in its corresponding section below.

To set points using the Ecobee driver, it is recommended to use the actuator agent. If you are not familiar with the Actuator, [read the documentation](#) and check out the example agent code at *examples/CSVDriver/CsvDriverAgent/agent.py* in the VOLTTRON repository.

## Setting an Ecobee “Setting”

Ecobee “Settings” points are simple points which are similar to a typical set point. Many settings are boolean values for basic Ecobee configuration settings (such as whether the temperature should be in degrees Celsius or Fahrenheit). Setting a “Setting” point is as simple as making an RPC request to the Actuator’s *set\_point* method with a supplied point name and desired setting. Consider a “setting” point *useCelsius*; use the following code to send a *set\_point* RPC request:

```
self.vip.rpc.call('platform.actuator', 'devices/campus/building/ecobee/useCelsius',
↳ True)
```

## Setting a Hold

Setting a Hold requires creating a *params* JSON object for the hold, many holds require setting more than one value each. For example, setting a temperature hold requires setting the upper (coolHoldTemp) and lower (heatHoldTemp) bounds desired. Create a Hold params object and send it as the contents of a *set\_point* RPC call to the Actuator.

Example Hold params object:

```
{
  "holdType": "nextTransition",
  "heatHoldTemp": 680,
  "coolHoldTemp": 720
}
```

Body of the HTTP request sent by the driver to Ecobee’s Web API:

```
{
  "selection": {
    "selectionType": "thermostats",
    "selectionMatch": "<ecobee id>"
  },
  "functions": [
    {
      "type": "setHold",
```

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```
        "params": {
            # user-specified params object
        }
    ]
}
```

---

**Note:** In a `heat/coolHoldTemp` hold, `holdType`, `heatHoldTemp`, and `coolHoldTemp` values are all required by the Ecobee web API. In this case, the *holdType* describes how the hold should be applied, the *heatHoldTemp* is the lower temperature bound for the hold, and the *coolHoldTemp* is the upper temperature bound.

---

RPC request to the actuator:

```
self.vip.rpc.call('platform.actuator', 'devices/campus/building/ecobee/heatHoldTemp',   
↳ True)
```

---

**Note:** In Ecobee data, a Hold set by the user is sometimes denoted as “desired<point>” and the sensor reading for the held value as “actual<point>”. For example, a Hold set by a user called *heatHoldTemp* can be found in Ecobee publishes as *desiredHeat* and the actual temperature reading as *actualTemperature*.

---

Ecobee’s documentation on Hold objects can be found here:

## Adding and Deleting a Vacation

To add a vacation, call the `set_point` JSON-RPC method of the Actuator, providing the vacation parameters object required by Ecobee along with the Vacation point. The params object is sent inside a create vacation object sent to the web API:

```
{
    "selection": {
        "selectionType": "registered",
        "selectionMatch": ""
    },
    "functions": [
        {
            "type": "createVacation",
            "params": {
                # user-specified params object
            }
        }
    ]
}
```

It is possible to supply complex objects including values for fans, vents, occupation status, etc. but a basic vacation requires only a name, cool and heat hold temperatures, start and end dates with start and end times. Example:

```
{
    "name": "Skiing",
    "coolHoldTemp": 780,
    "heatHoldTemp": 660,
    "startDate": "2016-03-15",
```

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```

    "startTime": "20:00:00",
    "endDate": "2016-03-29",
    "endTime": "08:00:00"
}

```

Providing a params object which does not contain these required values will result in the driver throwing an error.

Example `set_point` RPC call for Vacation:

```

self.vip.rpc.call('platform.actuator', 'set_point', 'devices/campus/building/ecobee/
↪Vacation', params)

```

It is also possible to delete a stored vacation object. To do so, supply the vacation name specified in the params object with the delete keyword set to True.

```

self.vip.rpc.call('platform.actuator', 'set_point',
                  'devices/campus/building/ecobee/Vacation', "Skiing", True)

```

A more in-depth example of using the Ecobee web API endpoint for setting a vacation can be found here: <https://www.ecobee.com/home/developer/api/examples/ex9.shtml>

## Adding a Program

Programs can also be added using the Ecobee driver. To add a program, the user should supply an Ecobee program object in the `set_point` JSON-RPC request:

```

{
    "selection": {
        "selectionType": "registered",
        "selectionMatch": ""
    },
    "thermostat": {
        "program": {
            <program object here>
        }
    }
}

```

Program objects consist of a list of “climate” objects and “schedule” objects. Climate objects specify the climate settings which correspond to a climate name (for example, a “Warm” climate may be set for a high heat and cool hold temp). Schedule objects list the desired climate settings for every half hour of the day (48 total) for 7 days, each referring to a climate name.

Example climate:

```

{
    "name": "Warm",
    "isOccupied": true,
    "isOptimized": false,
    "coolFan": "auto",
    "heatFan": "auto",
    "vent": "off",
    "ventilatorMinOnTime": 20,
    "owner": "system",
    "type": "program",

```

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```

    "coolTemp": 752,
    "heatTemp": 740
}

```

Example Schedule:

```

[
    [
        "sleep",
        "sleep",
        "sleep",
        "sleep",
        "home",
        "home",
        "home",
        ...
    ],
    ...
]

```

Program Body:

```

{
    "schedule": [
        [
            "sleep",
            "sleep",
            ...
            "home",
            "sleep"
        ],
        ...
    ],
    "climates": [
        {
            "name": "Sleep",
            "climateRef": "sleep",
            "isOccupied": true,
            "isOptimized": false,
            "coolFan": "auto",
            "heatFan": "auto",
            "vent": "off",
            "ventilatorMinOnTime": 20,
            "owner": "system",
            "type": "program",
            "colour": 2179683,
            "coolTemp": 752,
            "heatTemp": 662
        },
        ...
    ]
}

```

Example `set_point` RPC call for Program:

```

self.vip.rpc.call('platform.actuator', 'set_point', 'devices/campus/building/ecobee/
↪Vacation', program_body)

```



If the user would like to resume the existing program instead, it is possible to specify `None` for the program body with the keyword `resume_all` set to `True`.

Example `set_point` RPC call to resume the Program:

```
self.vip.rpc.call('platform.actuator', 'set_point',
                  'devices/campus/building/ecobee/Vacation', None, True)
```

A more in-depth example describing the objects required by the Ecobee web API endpoint for setting a program can be found here: <https://www.ecobee.com/home/developer/api/examples/ex11.shtml>

## Status

The *Status* point is a read-only register supplying the running status of the HVAC systems the thermostat is interfacing with. `set_point` is not available for this point; `set_point` RPC calls for this point will raise a *NotImplementedError* exception.

## Versioning

The Ecobee driver has been tested using the May 2019 API release as well as device firmware version 4.5.73.24

## IEEE 2030.5 (SEP 2.0) Driver

Communicating with IEEE 2030.5 devices requires that the IEEE 2030.5 Agent is configured and running. All device communication happens through this agent. For information about the IEEE 2030.5 Agent, please see *IEEE 2030.5 Agent* docs.

## Driver Config

There are two arguments for the *driver\_config* section of the IEEE 2030.5 device configuration file:

- **sfdi** - Short-form device ID of the IEEE 2030.5 device.
- **ieee2030\_5\_agent\_id** - ID of VOLTTRON's IEEE 2030.5 agent.

Here is a sample IEEE 2030.5 device configuration file:

```
{
  "driver_config": {
    "sfdi": "097935300833",
    "IEEE2030_5_agent_id": "iee2030_5agent"
  },
  "campus": "campus",
  "building": "building",
  "unit": "IEEE2030_5",
  "driver_type": "ieee2030_5",
  "registry_config": "config://ieee2030_5.csv",
  "interval": 15,
  "timezone": "US/Pacific",
  "heart_beat_point": "Heartbeat"
}
```

A sample IEEE 2030.5 driver configuration file can be found in the VOLTTRON repository in `services/core/PlatformDriverAgent/example_configurations/test_ieee2030_5_1.config`.

## Registry Configuration

For a description of IEEE 2030.5 registry values, see [IEEE 2030.5 DER Agent](#).

A sample IEEE 2030.5 registry configuration file can be found in the VOLTTRON repository in `services/core/PlatformDriverAgent/example_configurations/ieee2030_5.csv`.

View the [IEEE 2030.5 agent specification document](#) to learn more about IEEE 2030.5 and the IEEE 2030.5 agent and driver.

## Modbus Driver

VOLTTRON's modbus driver supports the Modbus over TCP/IP protocol only. For Modbus RTU support, see VOLTTRON's *Modbus-TK driver* <*Modbus-TK-Driver*>.

[About Modbus protocol](#)

## Modbus Driver Configuration

### Requirements

The Modbus driver requires the pymodbus package. This package can be installed in an activated environment with:

```
pip install pymodbus
```

Alternatively this requirement can be installed using *bootstrap.py* with the `--drivers` option:

```
python3 bootstrap.py --drivers
```

## Driver Configuration

There are three arguments for the *driver\_config* section of the device configuration file:

- **device\_address** - IP Address of the device.
- **port** - Port the device is listening on. Defaults to 502 which is the standard port for Modbus devices.
- **slave\_id** - Slave ID of the device. Defaults to 0. Use 0 for no slave.

The remaining values are as follows:

Here is an example device configuration file:

```
{
  "driver_config": {"device_address": "10.1.1.2",
                    "port": 502,
                    "slave_id": 5},
  "driver_type": "modbus",
  "registry_config": "config://registry_configs/hvac.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

A sample MODBUS configuration file can be found in the VOLTTRON repository in *examples/configurations/drivers/modbus.config*

## Modbus Registry Configuration File

The registry configuration file is a [CSV](#) file. Each row configures a point on the device.

The following columns are required for each row:

- **Volttron Point Name** - The name by which the platform and agents running on the platform will refer to this point. For instance, if the Volttron Point Name is `HeatCall1` (and using the example device configuration above) then an agent would use `pnnl/isb2/hvac1/HeatCall1` to refer to the point when using the RPC interface of the actuator agent.
- **Units** - Used for meta data when creating point information on the historian.
- **Modbus Register** - A string representing how to interpret the data register and how to read it from the device. The string takes two forms:
  - “**BOOL**” for coils and discrete inputs.
  - A format string for the Python struct module. See [the Python3 Struct docs](#) for full documentation. The supplied format string must only represent one value. See the documentation of your device to determine how to interpret the registers. Some Examples:
    - \* “>f” - A big endian 32-bit floating point number.
    - \* “<H” - A little endian 16-bit unsigned integer.
    - \* “>I” - A big endian 32-bit integer.
- **Writable** - Either *TRUE* or *FALSE*. Determines if the point can be written to. Only points labeled **TRUE** can be written to through the ActuatorAgent.
- **Point Address** - Modbus address of the point. Cannot include any offset value, it must be the exact value of the address.
- **Mixed Endian** - (Optional) Either *TRUE* or *FALSE*. For mixed endian values. This will reverse the order of the Modbus registers that make up this point before parsing the value or writing it out to the device. Has no effect on bit values.

The following column is optional:

- **Default Value** - The default value for the point. When the point is reverted by an agent it will change back to this value. If this value is missing it will revert to the last known value not set by an agent.

Any additional columns will be ignored. It is common practice to include a *Point Name* or *Reference Point Name* to include the device documentation’s name for the point and *Notes* and *Unit Details* for additional information about a point.

The following is an example of a Modbus registry configuration file:

Table 29: Catalyst 371

Reference Point Name	Volttron Point Name	Units	Units Details	Modbus Register	Writable	Point Address	Default Value	Notes
CO2Sensor	ReturnAirCO2	PPM	0.00-2000.00	>f	FALSE	1001		CO2 Reading 0.00-2000.0 ppm
CO2Stpt	ReturnAirCO2Stpt	PPM	1000.00 (default)	>f	TRUE	1011	1000	Setpoint to enable demand control ventilation
Cool1Spd	Cool-Supply-FanSpeed1	%	0.00 to 100.00 (75 default)	>f	TRUE	1005	75	Fan speed on cool 1 call
Cool2Spd	Cool-Supply-FanSpeed2	%	0.00 to 100.00 (90 default)	>f	TRUE	1007	90	Fan speed on Cool2 Call
Damper	DamperSignal	%	0.00 - 100.00	>f	FALSE	1023		Output to the economizer damper
DaTemp	DischargeAirTemperature	F	(-)39.99 to 248.00	>f	FALSE	1009		Discharge air reading
ESME-conMin	ESM-Damper-MinPosition	%	0.00 to 100.00 (5 default)	>f	TRUE	1013	5	Minimum damper position during the energy savings mode
FanPower	Supply-FanPower	kW	0.00 to 100.00	>f	FALSE	1015		Fan power from drive
FanSpeed	Supply-FanSpeed	%	0.00 to 100.00	>f	FALSE	1003		Fan speed from drive
HeatCall1	HeatCall1	On / Off	on/off	BOOL	FALSE	1113		Status indicator of heating stage 1 need
HeartBeat	heartbeat	On / Off	on/off	BOOL	FALSE	1114		Status indicator of heating stage 2 need

A sample Modbus registry file can be found [here](#) or in the VOLTTRON repository in *examples/configurations/drivers/catalyst371.csv*

## Modbus TK Driver

VOLTTRON's Modbus-TK driver, built on the Python Modbus-TK library, is an alternative to the original VOLTTRON modbus driver. Unlike the original modbus driver, the Modbus-TK driver supports Modbus RTU as well as Modbus over TCP/IP.

### About Modbus protocol

The Modbus-TK driver introduces a map library and configuration builder, intended as a way to streamline configuration file creation and maintenance.

**Warning:** Currently the modbus\_tk library is not able to make connections from 2 Modbus masters on one host to 2 slaves on one host - this will prevent a single platform from being able to communicate to 2 slaves on IP

as each instance of a Modbus\_Tk driver creates a new Modbus master. [Issue on Modbus\\_Tk Github](#).

## Modbus-TK Driver Configuration

The Modbus-TK driver is mostly backward-compatible with the parameter definitions in the original Modbus driver's configuration (.config and .csv files). If the config file's parameter names use the Modbus driver's name conventions, they are translated to the Modbus-TK name conventions, e.g. a Modbus CSV file's `Point Address` is interpreted as a Modbus-TK "Address". Backward-compatibility exceptions are:

- If the config file has no `port`, the default is 0, not 502.
- If the config file has no `slave_id`, the default is 1, not 0.

## Requirements

The Modbus-TK driver requires the `modbus-tk` package. This package can be installed in an activated environment with:

```
pip install modbus-tk
```

Alternatively this requirement can be installed using *bootstrap.py* with the `--drivers` option:

```
python3 bootstrap.py --drivers
```

## Driver Configuration

The `driver_config` section of a Modbus-TK device configuration file supports a variety of parameter definitions, but only **device\_address** is required:

- `name` (Optional) - Name of the device. Defaults to "UNKNOWN".
- `device_type` (Optional) - Name of the device type. Defaults to "UNKNOWN".
- `device_address` (Required) - IP Address of the device.
- `port` (Optional) - Port the device is listening on. Defaults to 0 (no port). Use port 0 for RTU transport.
- `slave_id` (Optional) - Slave ID of the device. Defaults to 1. Use ID 0 for no slave.
- `baudrate` (Optional) - Serial (RTU) baud rate. Defaults to 9600.
- `bytesize` (Optional) - Serial (RTU) byte size: 5, 6, 7, or 8. Defaults to 8.
- `parity` (Optional) - Serial (RTU) parity: none, even, odd, mark, or space. Defaults to none.
- `stopbits` (Optional) - Serial (RTU) stop bits: 1, 1.5, or 2. Defaults to 1.
- `xonxoff` (Optional) - Serial (RTU) flow control: 0 or 1. Defaults to 0.
- `addressing` (Optional) - Data address table: offset, offset\_plus, or address. Defaults to offset.
  - `address`: The exact value of the address without any offset value.
  - `offset`: The value of the address plus the offset value.
  - `offset_plus`: The value of the address plus the offset value plus one.
  - : If an offset value is to be added, it is determined based on a point's properties in the CSV file:

- \* Type=bool, Writable=TRUE: 0
- \* Type=bool, Writable=FALSE: 10000
- \* Type!=bool, Writable=TRUE: 30000
- \* Type!=bool, Writable=FALSE: 40000
- endian (Optional) - Byte order: big or little. Defaults to big.
- write\_multiple\_registers (Optional) - Write multiple coils or registers at a time. Defaults to true.
  - If write\_multiple\_registers is set to false, only register types unsigned short (uint16) and boolean (bool) are supported. The exception raised during the configure process.
- register\_map (Optional) - Register map csv of unchanged register variables. Defaults to registry\_config csv.

Sample Modbus-TK configuration files are checked into the VOLTTRON repository in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps`.

Here is a sample TCP/IP Modbus-TK device configuration:

```
{
  "driver_config": {
    "device_address": "10.1.1.2",
    "port": "5020",
    "register_map": "config://modbus_tk_test_map.csv"
  },
  "driver_type": "modbus_tk",
  "registry_config": "config://modbus_tk_test.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

Here is a sample RTU Modbus-TK device configuration, using all default settings:

```
{
  "driver_config": {
    "device_address": "/dev/tty.usbserial-AL00IEEY",
    "register_map": "config://modbus_tk_test_map.csv"
  },
  "driver_type": "modbus_tk",
  "registry_config": "config://modbus_tk_test.csv",
  "interval": 60,
  "timezone": "UTC",
  "heart_beat_point": "heartbeat"
}
```

Here is a sample RTU Modbus-TK device configuration, with completely-specified settings:

```
{
  "driver_config": {
    "device_address": "/dev/tty.usbserial-AL00IEEY",
    "port": 0,
    "slave_id": 2,
    "name": "watts_on",
    "baudrate": 115200,
    "bytesize": 8,
    "parity": "none",
```

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```

        "stopbits": 1,
        "xonxoff": 0,
        "addressing": "offset",
        "endian": "big",
        "write_multiple_registers": true,
        "register_map": "config://watts_on_map.csv"
    },
    "driver_type": "modbus_tk",
    "registry_config": "config://watts_on.csv",
    "interval": 120,
    "timezone": "UTC"
}

```

## Modbus-TK Register Map CSV File

Modbus TK requires an additional registry configuration file compared to the paradigm of most other drivers. The registry map file is an analogue to the typical registry configuration file. The *registry configuration file* is a simple file which maps device point names to user specified point names.

The registry map file is a *CSV* file. Each row configures a register definition on the device.

- **Register Name (Required)** - The field name in the modbus client. This field is distinct and unchangeable.
- **Address (Required)** - The point's modbus address. The `addressing` option in the driver configuration controls whether this is interpreted as an exact address or an offset.
- **Type (Required)** - The point's data type: `bool`, `string[length]`, `float`, `int16`, `int32`, `int64`, `uint16`, `uint32`, or `uint64`.
- **Units (Optional)** - Used for metadata when creating point information on a historian. Default is an empty string.
- **Writable (Optional)** - `TRUE/FALSE`. Only points for which `Writable=TRUE` can be updated by a VOLTTRON agent. Default is `FALSE`.
- **Default Value (Optional)** - The point's default value. If it is reverted by an agent, it changes back to this value. If this value is missing, it will revert to the last known value not set by an agent.
- **Transform (Optional)** - Scaling algorithm: `scale(multiplier)`, `scale_int(multiplier)`, `scale_reg(register_name)`, `scale_reg_power10(register_name)`, `scale_decimal_int_signed(multiplier)`, `mod10k(reverse)`, `mod10k64(reverse)`, `mod10k48(reveres)` or `none`. Default is an empty string.
- **Table (Optional)** - Standard modbus table name defining how information is stored in slave device. There are 4 different tables:
  - `discrete_output_coils`: read/write coil numbers 1-9999
  - `discrete_input_contacts`: read only coil numbers 10001-19999
  - `analog_input_registers`: read only register numbers 30001-39999
  - `analog_output_holding_registers`: read/write register numbers 40001-49999

If this field is empty, the modbus table will be defined by **type** and **writable** fields. By that, when user sets read only for read/write coils/registers or sets read/write for read only coils/registers, it will select wrong table, and therefore raise exception.

- **Mixed Endian (Optional)** - `TRUE/FALSE`. If Mixed Endian is set to `TRUE`, the order of the Modbus registers will be reversed before parsing the value or writing it out to the device. By setting mixed endian, transform must be `None` (no op). Defaults to `FALSE`.

- **Description (Optional)** - Additional information about the point. Default is an empty string.

Any additional columns are ignored.

Sample Modbus-TK registry map CSV files are checked into the VOLTTRON repository in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps`.

Here is a sample Modbus-TK registry map:

Register Name	Address	Type	Units	Writable	Default Value	Transform	Table
unsigned_short	0	uint16	None	TRUE	0	scale(10)	ana-log_output_holding_registers
unsigned_int	1	uint32	None	TRUE	0	scale(10)	ana-log_output_holding_registers
unsigned_long	3	uint64	None	TRUE	0	scale(10)	ana-log_output_holding_registers
sample_short	7	int16	None	TRUE	0	scale(10)	ana-log_output_holding_registers
sample_int	8	int32	None	TRUE	0	scale(10)	ana-log_output_holding_registers
sample_float	10	float	None	TRUE	0.0	scale(10)	ana-log_output_holding_registers
sample_long	12	int64	None	TRUE	0	scale(10)	ana-log_output_holding_registers
sample_bool	16	bool	None	TRUE	False		ana-log_output_holding_registers
sample_str	17	string[12]	None	TRUE	hello world!		ana-log_output_holding_registers

## Modbus-TK Registry Configuration

The registry configuration file is a [CSV](#) file. Each row configures a point on the device.

- **Volttron Point Name (Required)** - The name by which the platform and agents refer to the point. For instance, if the Volttron Point Name is `HeatCall1`, then an agent would use `my_campus/building2/hvac1/HeatCall1` to refer to the point when using the RPC interface of the actuator agent.
- **Register Name (Required)** - The field name in the modbus client. It must be matched with the field name from `register_map`.

Any additional columns will override the existed fields from `register_map`.

Sample Modbus-TK registry CSV files are checked into the VOLTTRON repository in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps`.

Here is a sample Modbus-TK registry configuration with defined `register_map`:



Volttron Point Name	Register Name
unsigned short	unsigned_short
unsigned int	unsigned_int
unsigned long	unsigned_long
sample short	sample_short
sample int	sample_int
sample float	sample_float
sample long	sample_long
sample bool	sample_bool
sample str	sample_str

## Modbus-TK Driver Maps Repository

To help facilitate the creation of VOLTTRON device configuration entries (.config files) for Modbus-TK devices, a library of device type definitions is now maintained in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps/maps.yaml`. A command-line tool (described below under MODBUS TK Config Command Tool) uses the contents of `maps.yaml` while generating .config files.

Each device type definition in `maps.yaml` consists of the following properties:

- **name** (Required) - Name of the device type (see the `driver_config` parameters).
- **file** (Required) - The name of the CSV file that defines all of the device type's supported points, e.g. `watts_on.csv`.
- **description** (Optional) - A description of the device type.
- **addressing** (Optional) - Data address type: `offset`, `offset_plus`, or `address` (see the `driver_config` parameters).
- **endian** (Optional) - Byte order: `big` or `little` (see the `driver_config` parameters).
- **write\_multiple\_registers** (Optional) - Write multiple registers at a time. Defaults to `true`.

A device type definition is a template for a device configuration. Some additional data must be supplied when a specific device's configuration is generated. In particular, the `device_address` must be supplied.

A sample `maps.yaml` file is checked into the VOLTTRON repository in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps/maps.yaml`.

Here is a sample `maps.yaml` file:

```
- name: modbus_tk_test
  description: Example of reading selected points for Modbus-TK driver testing
  file: modbus_tk_test_map.csv
  addressing: offset
  endian: little
  write_multiple_registers: true
- name: watts_on
  description: Read selected points from Elkor WattsOn meter
  file: watts_on_map.csv
  addressing: offset
- name: ion6200
  description: ION 6200 meter
  file: ion6200_map.csv
- name: ion8600
  description: ION 8600 meter
  file: ion8600_map.csv
```

## Modbus-TK Config Command Tool

`config_cmd.py` is a command-line tool for creating and maintaining VOLTTRON driver configurations. The tool runs from the command line:

```
$ cd services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps
$ python config_cmd.py
```

`config_cmd.py` supports the following commands:

- `help` - List all commands.
- `quit` - Quit the command-line tool.
- `list_directories` - List all setup directories, with an option to edit their paths.
  - By default, all directories are in the VOLTTRON repository in `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/maps`.
  - It is important to use the correct directories when adding/editing device types and driver configs, and when loading configurations into VOLTTRON.
    - \* `map_dir`: directory in which `maps.yaml` is stored.
    - \* `config_dir`: directory in which driver config files are stored.
    - \* `csv_dir`: directory in which registry config CSV files are stored.
- `edit_directories` - Add/Edit map directory, driver config directory, and/or CSV config directory. Press <Enter> if no change is needed. Exits if the directory does not exist.
- `list_device_type_description` - List all device type descriptions in `maps.yaml`. Option to edit device type descriptions.
- `list_all_device_types` - List all device type information in `maps.yaml`. Option to add more device types.
- `device_type` - List information for a selected device type. Option to select another device type.
- `add_device_type` - Add a device type to `maps.yaml`. Option to add more than one device type. Each device type includes its name, CSV file, description, addressing, and endian, as explained in MODBUS-TK Driver Maps. If an invalid value is entered for addressing or endian, the default value is used instead.
- `edit_device_type` - Edit an existing device type. If an invalid value is entered for addressing or endian, the previous value is left unchanged.
- `list_drivers` - List all driver config names in `config_dir`.
- `driver_config <driver_name>` - Get a driver config from `config_dir`. Option to select the driver if no driver is found with that name.
- `add_driver_config <driver_name>` - Add/Edit `<config_dir>/<driver name>.config`. Option to select the driver if no driver is found with that name. Press <Enter> to exit.
- `load_volttron` - Load a driver config and CSV into VOLTTRON. Option to add the config or CSV file to `config_dir` or to `csv_dir`. VOLTTRON must be running when this command is used.
- `delete_volttron_config` - Delete a driver config from VOLTTRON. VOLTTRON must be running when this command is used.
- `delete_volttron_csv` - Delete a registry csv config from VOLTTRON. VOLTTRON must be running when this command is used.

The `config_cmd.py` module is checked into the VOLTTRON repository as `services/core/PlatformDriverAgent/platform_driver/interfaces/modbus_tk/config_cmd.py`.

## Obix Driver

### Obix Driver Configuration

VOLTTRON's uses Obix's restful interface to facilitate communication.

This driver does *not* handle reading data from the history section of the interface. If the user wants data published from the management systems historical data use the *Obix History* agent.

### Driver Configuration

There are three arguments for the `driver_config` section of the device configuration file:

- `url` - URL of the Obix remote API interface
- `username` - User's username for the Obix remote API
- `password` - Users' password corresponding to the username

Here is an example device configuration file:

```
{
  "driver_config": {"url": "http://example.com/obix/config/Drivers/Obix/exports/",
                    "username": "username",
                    "password": "password"},
  "driver_type": "obix",
  "registry_config": "config://registry_configs/obix.csv",
  "interval": 30,
  "timezone": "UTC"
}
```

A sample Obix configuration file can be found in the VOLTTRON repository in *examples/configurations/drivers/obix.config*

### Obix Registry Configuration File

The registry configuration file is a [CSV](#) file. Each row configures a point on the device.

The following columns are required for each row:

- **Volttron Point Name** - The name by which the platform and agents running on the platform will refer to this point. For instance, if the Volttron Point Name is `HeatCall1` then an agent would use `<device topic>/HeatCall1` to refer to the point when using the RPC interface of the actuator agent.
- **Obix Point Name** - Name of the point on the Obix interface. Escaping of spaces and dashes for use with the interface is handled internally.
- **Obix Type** - One of *bool*, *int*, or *real*
- **Units** - Used for meta data when creating point information on the historian.
- **Writable** - Either *TRUE* or *FALSE*. Determines if the point can be written to. Only points labeled **TRUE** can be written to through the ActuatorAgent. This can be used to protect points that should not be accessed by the platform.

The following column is optional:

- **Default Value** - The default value for the point. When the point is reverted by an agent it will change back to this value. If this value is missing it will revert to the last known value not set by an agent.

Any additional columns will be ignored. It is common practice to include a *Point Name* or *Reference Point Name* to include the device documentation's name for the point and *Notes* and *Unit Details* for additional information about a point.

The following is an example of a Obix registry configuration file:

Table 30: Obix

Volttron Point Name	Obix Point Name	Obix Type	Units	Writable	Notes
CostEL	CostEL	real	dollar	FALSE	Precision: 2
CostELBB	CostELBB	real	dollar	FALSE	Precision: 2
CDHEnergyHeartbeat	CDHEnergyHeartbeat	real	null	FALSE	
ThermalFollowing	ThermalFollowing	bool		FALSE	
CDHTestThermFollow	CDHTestThermFollow	bool		FALSE	
CollegeModeFromCDH	CollegeModeFromCDH	real	null	FALSE	Precision: 0, Min: 3.0, Max: 3.0
HospitalModeFromCDH	HospitalModeFrom-CDH	real	null	FALSE	Precision: 0, Min: 3.0, Max: 3.0
HomeModeFromCDH	HomeModeFromCDH	real	null	FALSE	Precision: 0, Min: 3.0, Max: 3.0
CostNG	CostNG	real	null	FALSE	Precision: 2
CollegeBaseload-SPFromCDH	CollegeBaseload-SPFromCDH	real	kilo-watt	FALSE	Precision: 0
CollegeImportSPFrom-CDH	CollegeImportSPFrom-CDH	real	kilo-watt	FALSE	Precision: 0
HospitalImportSPFrom-CDH	HospitalImportSPFrom-CDH	real	kilo-watt	FALSE	Precision: 0
HospitalBaseload-SPFromCDH	HospitalBaseload-SPFromCDH	real	kilo-watt	FALSE	Precision: 0
HomeImportSPFrom-CDH	HomeImportSPFrom-CDH	real	kilo-watt	FALSE	Precision: 0
ThermalFollowingAlarm	ThermalFollowingAlarm	bool		FALSE	

A sample Obix configuration can be found in the VOLTTRON repository in *examples/configurations/drivers/obix.csv*

## Automatic Obix Configuration File Creation

A script that will automatically create both a device and register configuration file for a site is located in the repository at *scripts/obix/get\_obix\_driver\_config.py*.

The utility is invoked with the command:

```
python get_obix_driver_config.py <url> <registry_file> <driver_file> -u <username> -p
↪<password>
```

If either the *registry\_file* or *driver\_file* is omitted the script will output those files to stdout.

If either the username or password arguments are left out the script will ask for them on the command line before proceeding.

The registry file produced by this script assumes that the *Volttron Point Name* and the *Obix Point Name* have the same value. Also, it is assumed that all points should be read only. Users are expected to fix this as appropriate.

## The Energy Detective Meter Driver

The TED-Pro is an energy monitoring system that can measure energy consumption of multiple mains and supports sub-metering of individual circuits. This driver connects to a TED Pro Energy Control Center (ECC) and can collect information from multiple Measuring Transmitting Units (MTUs) and Spyder sub-metering devices connected to the ECC.

### Configuration

The TED Pro device interface is configured as follows. You'll need the ip address or hostname of the ECC on a network segment accessible from the VOLTTRON instance, if configured to use a port other than 80, you can provide it as shown below, following a colon after the host address.

```
{
  "driver_type": "ted_meter",
  "driver_config": {
    "device_address": "192.168.1.100:8080",
    "username": "username",
    "password": "password",
    "scrape_spyder": true,
    "track_totalizers": true
  }
}
```

### Parameters

- **username** - Username if the TED Pro is configured with Basic Authentication
- **password** - Password if the TED Pro is configured with Basic Authentication
- **device\_address** - Hostname or IP address of the TED Pro ECC, a non-standard port can be included if needed
- **scrape\_spyder** - Default true, enables or disables collection of the sub-metering data from spyder devices connected to the TED Pro
- **track\_totalizers** - Default true, enables or disables tracking of lifetime totals in the VOLTTRON Driver

---

**Note:** The TED Pro does not expose its internal lifetime “totalized” metering, instead offering month to date (MTD) and daily totals (TDY). Using the “track\_totalizers” setting, the ted-meter driver will attempt to maintain monotonically increasing lifetime totalizers. To do so, it must retain state regarding the running total and the last read value. The driver makes use of the VOLTTRON Config subsystem to store this state. To reset these totals, delete the `1state/ted_meter/<device_path>1` config from the platform driver config store and restart the platform driver.

---

---

**Note:** This driver does not make use of the registry config. Because it is able to determine the configuration of the TED Pro Device via the API, it simply creates registers for each data source on the TED Pro

---

**Note:** This driver is internally aware of the appropriate HayStack Tags for its registers, however, the Platform Driver makes no provision for publishing those tags during a scrape. Therefore, integration of the tagging data is left to the end user.

## Examples



The above configuration in the TED will result in the following scrape from the ted-meter driver on the message bus:

```
[
  {
    'mtu-1/load_kva': 0.271,
    'mtu-1/load_kw': 0.203,
    'mtu-1/phase_angle': 195,
    'mtu-1/phase_current-a': '0',
    'mtu-1/phase_current-b': '0',
    'mtu-1/phase_current-c': '0',
    'mtu-1/phase_voltage-a': '0',
    'mtu-1/phase_voltage-b': '0',
    'mtu-1/phase_voltage-c': '0',
    'mtu-1/power_factor': 0.749,
```

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```

'mtu-1/voltage': 121.30000000000001,
'spyder-1/AHU/load': 0.0,
'spyder-1/AHU/mtd': 0.0,
'spyder-1/AHU/mtd_totalized': 0.0,
'spyder-1/C/U/load': 0.0,
'spyder-1/C/U/mtd': 0.0,
'spyder-1/C/U/mtd_totalized': 0.0,
'spyder-1/Fridge/load': 0.0,
'spyder-1/Fridge/mtd': 0.056,
'spyder-1/Fridge/mtd_totalized': 0.056,
'spyder-1/HW/load': 0.0,
'spyder-1/HW/mtd': 0.14400000000000002,
'spyder-1/HW/mtd_totalized': 0.14400000000000002,
'spyder-1/Toaster/load': 0.0,
'spyder-1/Toaster/mtd': 0.24,
'spyder-1/Toaster/mtd_totalized': 0.24,
'system/mtd': 0.652,
'system/mtd_totalized': 0.652
},
{
'mtu-1/load_kva': {'type': 'integer', 'tz': u'', 'units': 'kVA'},
'mtu-1/load_kw': {'type': 'integer', 'tz': u'', 'units': 'kW'},
'mtu-1/phase_angle': {'type': 'integer', 'tz': u'', 'units': 'degrees'},
'mtu-1/phase_current-a': {'type': 'integer', 'tz': u'', 'units': 'Amps'},
'mtu-1/phase_current-b': {'type': 'integer', 'tz': u'', 'units': 'Amps'},
'mtu-1/phase_current-c': {'type': 'integer', 'tz': u'', 'units': 'Amps'},
'mtu-1/phase_voltage-a': {'type': 'integer', 'tz': u'', 'units': 'Volts'},
'mtu-1/phase_voltage-b': {'type': 'integer', 'tz': u'', 'units': 'Volts'},
'mtu-1/phase_voltage-c': {'type': 'integer', 'tz': u'', 'units': 'Volts'},
'mtu-1/power_factor': {'type': 'integer', 'tz': u'', 'units': 'ratio'},
'mtu-1/voltage': {'type': 'integer', 'tz': u'', 'units': 'Volts'},
'spyder-1/AHU/load': {'type': 'integer', 'tz': u'', 'units': 'kW'},
'spyder-1/AHU/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
'spyder-1/AHU/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
'spyder-1/C/U/load': {'type': 'integer', 'tz': u'', 'units': 'kW'},
'spyder-1/C/U/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
'spyder-1/C/U/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
'spyder-1/Fridge/load': {'type': 'integer', 'tz': u'', 'units': 'kW'},
'spyder-1/Fridge/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
'spyder-1/Fridge/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    },
    'spyder-1/HW/load': {'type': 'integer', 'tz': u'', 'units': 'kW'},
    'spyder-1/HW/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    'spyder-1/HW/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    'spyder-1/Toaster/load': {'type': 'integer', 'tz': u'', 'units': 'kW'},
    'spyder-1/Toaster/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    'spyder-1/Toaster/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    },
    'system/mtd': {'type': 'integer', 'tz': u'', 'units': 'kWh'},
    'system/mtd_totalized': {'type': 'integer', 'tz': u'', 'units': 'kWh'}
}
]

```

## 2.13 Historian Framework

Historian Agents are the way by which *device*, *actuator*, *datalogger*, and *analysis* topics are automatically captured and stored in some sort of data store. Historians exist for the following storage options:

- A general *SQL Historian* implemented for MySQL, SQLite, PostgreSQL, and Amazon Redshift
- *MongoDB Historian*
- *Crate Historian*
- *Forward Historian* for sending data to another VOLTTRON instance
- *OpenEIS Historian*
- *MQTT Historian* Forwards data to an MQTT broker
- *InfluxDB Historian*

**Attention:** Historians are split into the directories of **core**, **contributed** and **unsupported**.

```
services/contrib/  
services/core/  
services/unsupported/
```

Other implementations of Historians can be created by following the *Developing Historian Agents* guide.

A video tutorial of historian framework can be found [here](#)

### 2.13.1 Base Historian

Historians are all built upon the *BaseHistorian* which provides general functionality the specific implementations are built upon.

This base Historian will cache all received messages to a local database before publishing it to the Historian. This allows recovery from unexpected happenings before the successful writing of data to the Historian.

### 2.13.2 Configuration

In most cases the default configuration settings are fine for all deployments.

All Historians support the following settings:

```
{  
    # Maximum amount of time to wait before retrying a failed publish in seconds.  
    # Will try more frequently if new data arrives before this timeline expires.  
    # Defaults to 300  
    "retry_period": 300.0,  
  
    # Maximum number of records to submit to the historian at a time.  
    # Defaults to 1000  
    "submit_size_limit": 1000,  
  
    # In the case where a historian needs to catch up after a disconnect  
    # the maximum amount of time to spend writing to the database before  
    # checking for and caching new data.
```

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```

# Defaults to 30
"max_time_publishing": 30.0,

# Limit how far back the historian will keep data in days.
# Partial days supported via floating point numbers.
# A historian must implement this feature for it to be enforced.
"history_limit_days": 366,

# Limit the size of the historian data store in gigabytes.
# A historian must implement this feature for it to be enforced.
"storage_limit_gb": 2.5

# Size limit of the backup cache in Gigabytes.
# Defaults to no limit.
"backup_storage_limit_gb": 8.0,

# How full should the backup storage be for an alert to be raised.
# percentage as decimal. For example set value as 0.9 to get alerted when cache_
↳ becomes more than 90% configured
# size limit
"backup_storage_report" : 0.9,

# Do not actually gather any data. Historian is query only.
"readonly": false,

# capture_device_data
# Defaults to true. Capture data published on the `devices/` topic.
"capture_device_data": true,

# capture_analysis_data
# Defaults to true. Capture data published on the `analysis/` topic.
"capture_analysis_data": true,

# capture_log_data
# Defaults to true. Capture data published on the `datalogger/` topic.
"capture_log_data": true,

# capture_record_data
# Defaults to true. Capture data published on the `record/` topic.
"capture_record_data": true,

# After publishing every "message_publish_count" number of records, historian_
↳ writes
# INFO level log with total number of records published since start of historian
"message_publish_count": 10000,

# If historian should subscribe to the configured topics from all platform_
↳ (instead of just local platform)
# by default subscription is only to local topics
"all_platforms": false,

# Replace a one topic with another before saving to the database.
"topic_replace_list": [
  {"from": "FromString", "to": "ToString"}
],

# For historian developers. Adds benchmarking information to gathered data.

```

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```

# Defaults to false and should be left that way.
"gather_timing_data": false

# Allow for the custom topics or for limiting topics picked up by a historian_
↪instance.
# the key for each entry in custom topics is the data handler. The topic and_
↪data must
# conform to the syntax the handler expects (e.g., the capture_device_data_
↪handler expects
# data the driver framework). Handlers that expect specific data format are
# capture_device_data, capture_log_data, and capture_analysis_data. All other_
↪handlers will be
# treated as record data. The list associated with the handler is a list of custom
# topics to be associated with that handler.
#
# To restrict collection to only the custom topics, set the following config_
↪variables to False
# capture_device_data
# capture_analysis_data
# capture_log_data
# capture_record_data
"custom_topics": {
    "capture_device_data": ["devices/campus/building/device/all"],
    "capture_analysis_data": ["analysis/application_data/example"],
    "capture_record_data": ["example"]
},

# To restrict the points processed by a historian for a device or set of devices_
↪(i.e., this configuration
# parameter only filters data on topics with base 'devices). If the 'device' is_
↪in the
# topic (e.g., 'devices/campus/building/device/all') then only points in the list_
↪will be passed to the
# historians capture_data method, and processed by the historian for storage in_
↪its database (or forwarded to a
# remote platform (in the case of the ForwardHistorian). The key in the device_
↪data_filter dictionary can
# be made more restrictive (e.g., "device/subdevice") to limit unnecessary_
↪searches through topics that may not
# contain the point(s) of interest.
"device_data_filter":{
    "device": ["point_name1", "point_name2"]
},

# list of topics for which incoming record's timestamp should be compared with_
↪current timestamp to see if it
# within the configured tolerance limit. Default value: "devices"
"time_tolerance_topics": ["devices"],

# If this is set, timestamp of incoming records on time_tolerance_topics (by_
↪default, "devices" topics) are
# compared with current timestamp. If the difference between current timestamp_
↪and the record's timestamp
# exceeds the configured time_tolerance (seconds), then those records are added_
↪to a separate time_error table
# in cache and are not sent to concrete historian for publishing. An alert is_
↪raised when records are entered

```

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```

# into the time_error table. Units: seconds
"time_tolerance": 5,

# If set to true the base_historian will not publish to the concrete historian_
→ (SQLHistorian, CrateHistorian ...)
# This is useful for storing historian data while updating database versions.
"cache_only_enabled": False
}

```

### 2.13.3 Topics

By default the base historian will listen to 4 separate root topics:

- *datalogger*/\*
- *record*/\*
- *analysis*/\*
- *devices*/\*

Each root topic has a *specific message syntax* that it is expecting for incoming data.

Messages published to *datalogger* will be assumed to be *timepoint* data that is composed of units and specific types with the assumption that they have the ability to be plotted easily.

Messages published to *devices* are data that comes directly from drivers.

Messages published to *analysis* are analysis data published by agents in the form of key value pairs.

Finally, messages that are published to *record* will be handled as string data and can be customized to the user specific situation.

### 2.13.4 Platform Historian

A platform historian is a “*friendly named*” historian on a VOLTTRON instance. It always has the identity of *platform.historian*. A platform historian is made available to a VOLTTRON Central agent for monitoring of the VOLTTRON instances health and plotting topics from the platform historian. In order for one of the historians to be turned into a platform historian the *identity* keyword must be added to it’s configuration with the value of *platform.historian*. The following configuration file shows a SQLite based platform historian configuration:

```

{
  "agentid": "sqlhistorian-sqlite",
  "identity": "platform.historian",
  "connection": {
    "type": "sqlite",
    "params": {
      "database": "~/.volttron/data/platform.historian.sqlite"
    }
  }
}

```

## 2.13.5 Historian Video Tutorial

### Historian Topic Syntax

Each historian will subscribe to the following message bus topics:

- *datalogger/\**
- *anaylsis/\**
- *record/\**
- *devices/\**

For each of these topics there is a different message syntax that must be adhered to in order for the correct interpretation of the data being specified.

#### **record/\***

The record topic is the most flexible of all of the topics. This topic allows any serializable message to be published to any topic under the root topic *record/*.

---

**Note:** This topic is not recommended to plot, as the structure of the messages are not necessarily numeric

---

```
# Example messages that can be published

# Dictionary data
{'foo': 'world'}

# Numerical data
52

# Time data (note: not a `datetime` object)
'2015-12-02T11:06:32.252626'
```

#### **devices/\***

The *devices* topic is meant to be data structured from a scraping of a Modbus or BACnet device. Currently drivers for both of these protocols write data to the message bus in the proper format. VOLTTRON drivers also publish an aggregation of points in an *all* topic.

**Only the `all` topic messages are read and published to a historian.**

Both the all topic and point topic have the same header information, but the message body for each is slightly different. For a complete working example of these messages please see `examples.ExampleSubscriber.subscriber.subscriber_agent`

The format of the header and message for device topics (i.e. messages published to topics with pattern “devices/\*/*all*”) follows the following pattern:

```
# Header contains the data associated with the message.
{
    # python code to get this is
    # from datetime import datetime
    # from volttron.platform.messaging import headers as header_mod
```

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```

# from volttron.platform.agent import utils
# now = utils.format_timestamp( datetime.utcnow())
# {
#     headers_mod.DATE: now,
#     headers_mod.TIMESTAMP: now
# }
"Date": "2015-11-17 21:24:10.189393+00:00",
"TimeStamp": "2015-11-17 21:24:10.189393+00:00"
}

# Message Format:

# WITH METADATA
# Messages contains a two element list. The first element contains a
# dictionary of all points under a specific parent. While the second
# element contains a dictionary of meta data for each of the specified
# points. For example devices/pnnl/building/OutsideAirTemperature and
# devices/pnnl/building/MixedAirTemperature ALL message would be created as:
[
    {"OutsideAirTemperature": 52.5, "MixedAirTemperature": 58.5},
    {
        "OutsideAirTemperature": {'units': 'F', 'tz': 'UTC', 'type': 'float'},
        "MixedAirTemperature": {'units': 'F', 'tz': 'UTC', 'type': 'float'}
    }
]

#WITHOUT METADATA
# Message contains a dictionary of all points under a specific parent
{"OutsideAirTemperature": 52.5, "MixedAirTemperature": 58.5}

```

**analysis/\***

Data sent to *analysis/\** topics is result of analysis done by applications. The format of data sent to *analysis/\** topics is similar to data sent to *devices/\*all* topics.

**datalogger/\***

Messages published to *datalogger/\** will be assumed to be time point data that is composed of units and specific types with the assumption that they have the ability to be graphed easily.

```

{"MixedAirTemperature": {"Readings": ["2015-12-02T00:00:00",
                                     <mixed_reading>,
                                     "Units": "F",
                                     "tz": "UTC",
                                     "data_type": "float"]}}

```

If no datetime value is specified as a part of the reading, current time is used. A Message can be published without any header. In the above message *Readings* and *Units* are mandatory.

## Crate Historian

Crate is an open source SQL database designed on top of a No-SQL design. It allows automatic data replication and self-healing clusters for high availability, automatic sharding, and fast joins, aggregations and sub-selects.

---

**Note:** The Crate Historian is located within the **core** directory.

```
services/core/CrateHistorian/
```

---

Find out more about crate from <https://crate.io/>.

## Prerequisites

### 1. Crate Database

For Arch Linux, Debian, RedHat Enterprise Linux and Ubuntu distributions there is a simple installer to get Crate up and running on your system.

```
sudo bash -c "$(curl -L https://try.crate.io)"
```

This command will download and install all of the requirements for running Crate, create a Crate user and install a Crate service. After the installation the service will be available for viewing at `http://localhost:4200` by default.

---

**Note:** There is no authentication support within crate.

---

### 2. Crate Driver

There is a Python library for crate that must be installed in the VOLTTRON Python virtual environment in order to access Crate. From an activated environment, in the root of the volttron folder, execute the following command:

```
python bootstrap.py --crate
```

or

```
python bootstrap.py --databases
```

or

```
pip install crate
```

## Configuration

Because there is no authorization to access a crate database the configuration for the Crate Historian is very easy.

```
{
  "connection": {
    "type": "crate",
    # Optional table prefix defaults to historian
    "schema": "testing",
    "params": {
      "host": "localhost:4200"
    }
  }
}
```

Finally package, install and start the Crate Historian agent.

### See also:

*Agent Development Walk-through*

## Influxdb Historian

InfluxDB is an open source time series database with a fast, scalable engine and high availability. It's often used to build DevOps Monitoring (Infrastructure Monitoring, Application Monitoring, Cloud Monitoring), IoT Monitoring, and real-time analytics solutions.

---

**Note:** The Influxdb Historian is located within the **contributed** directory.

```
services/contrib/InfluxdbHistorian/
```

---

More information about InfluxDB is available from <https://www.influxdata.com/>.

## Prerequisites

### InfluxDB Installation

To install InfluxDB on an Ubuntu or Debian operating system, run the script:

```
services/core/InfluxdbHistorian/scripts/install-influx.sh
```

For installation on other operating systems, see <https://docs.influxdata.com/influxdb/v1.4/introduction/installation/>.

## Authentication in InfluxDB

By default, the InfluxDB *Authentication* option is disabled, and no user authentication is required to access any InfluxDB database. You can enable authentication by updating the InfluxDB configuration file. For detailed information on enabling authentication, see: [https://docs.influxdata.com/influxdb/v1.4/query\\_language/authentication\\_and\\_authorization/](https://docs.influxdata.com/influxdb/v1.4/query_language/authentication_and_authorization/).

If *Authentication* is enabled, authorization privileges are enforced. There must be at least one defined admin user with access to administrative queries as outlined in the linked document above. Additionally, you must pre-create the user and database that are specified in the configuration file (the default configuration file for InfluxDB is *services/core/InfluxdbHistorian/config*). If your user is a non-admin user, they must be granted a full set of privileges on the desired database.

## InfluxDB Driver

In order to connect to an InfluxDb client, the Python library for InfluxDB must be installed in VOLTTRON's virtual environment. From the command line, after enabling the virtual environment, install the InfluxDB library as follows:

```
python bootstrap.py --influxdb
```

or

```
python bootstrap.py --databases
```

or

```
pip install influxdb
```

## Configuration

The default configuration file for VOLTTRON's InfluxDB Historian agent should be in the format:

```
{
  "connection": {
    "params": {
      "host": "localhost",
      "port": 8086,          # Don't change this unless default bind port
                           # in influxdb config is changed
      "database": "historian",
      "user": "historian",  # user is optional if authentication is turned off
      "passwd": "historian" # passwd is optional if authentication is turned off
    }
  },
  "aggregations": {
    "use_calendar_time_periods": true
  }
}
```

The InfluxDB Historian agent can be packaged, installed and started according to the standard VOLTTRON agent creation procedure. A sample VOLTTRON configuration file has been provided: *services/core/InfluxdbHistorian/config*.

**See also:**

*Agent Development Walk-through*



## Connection

The `host`, `database`, `user` and `passwd` values in the VOLTTRON configuration file can be modified. `user` and `passwd` are optional if InfluxDB *Authentication* is disabled.

---

**Note:** Be sure to initialize or pre-create the `database` and `user` defined in the configuration file, and if `user` is a non-admin user, be make sure to grant privileges for the user on the specified database. For more information, see *Authentication in InfluxDB*.

---

## Aggregations

In order to use aggregations, the VOLTTRON configuration file must also specify a value, either `true` or `false`, for `use_calendar_time_periods`, indicating whether the aggregation period should align to calendar time periods. If this value is omitted from the configuration file, aggregations cannot be used.

For more information on historian aggregations, see: *Aggregate Historian Agent Specification*.

Supported Influxdb aggregation functions:

- Aggregations: `COUNT()`, `DISTINCT()`, `INTEGRAL()`, `MEAN()`, `MEDIAN()`, `MODE()`, `SPREAD()`, `STD-DEV()`, `SUM()`
- Selectors: `FIRST()`, `LAST()`, `MAX()`, `MIN()`
- Transformations: `CEILING()`, `CUMULATIVE_SUM()`, `DERIVATIVE()`, `DIFFERENCE()`, `ELAPSED()`, `NON_NEGATIVE_DERIVATIVE()`, `NON_NEGATIVE_DIFFERENCE()`

More information how to use those functions: [https://docs.influxdata.com/influxdb/v1.4/query\\_language/functions/](https://docs.influxdata.com/influxdb/v1.4/query_language/functions/)

---

**Note:** Historian aggregations in InfluxDB are different from aggregations employed by other historian agents in VOLTTRON. InfluxDB doesn't have a separate agent for aggregations. Instead, aggregation is supported through the `query_historian` function. Other agents can execute an aggregation query directly in InfluxDB by calling the `RPC.export` method `query`. For an example, see *Aggregate Historian Agent Specification*

---

## Database Schema

Each InfluxDB database has a *meta* table as well as other tables for different measurements, e.g. one table for “power\_kw”, one table for “energy”, one table for “voltage”, etc. (An InfluxDB *measurement* is similar to a relational table, so for easier understanding, InfluxDB measurements will be referred to below as tables.)

## Measurement Table

Example: If a topic name is *CampusA/Building1/Device1/Power\_KW*, the *power\_kw* table might look as follows:

time	building	campus	device	source	value
2017-12-28T20:41:00.004260096Z	building1	campusa	device1	scrape	123.4
2017-12-30T01:05:00.004435616Z	building1	campusa	device1	scrape	567.8
2018-01-15T18:08:00.126345Z	building1	campusa	device1	scrape	10

`building`, `campus`, `device`, and `source` are InfluxDB *tags*. `value` is an InfluxDB *field*.

**Note:** The topic is converted to all lowercase before being stored in the table. In other words, a set of *tag* names, as well as a table name, are created by splitting *topic\_id* into substrings (see [meta table](#) below).

In this example, where the typical format of a topic name is `<campus>/<building>/<device>/<measurement>`, *campus*, *building* and *device* are each stored as tags in the database.

A topic name might not confirm to that convention:

1. The topic name might contain additional substrings, e.g. *CampusA/Building1/LAB/Device/OutsideAirTemperature*. In this case, *campus* will be `campusa/building`, *building* will be `lab`, and *device* will be `device`.
2. The topic name might contain fewer substrings, e.g. *LAB/Device/OutsideAirTemperature*. In this case, the *campus* tag will be empty, *building* will be `lab`, and *device* will be `device`.

## Meta Table

The meta table will be structured as in the following example:

time	last_updated	meta_dict	topic	topic_id
1970-01-01T00:00:00Z	2017-12-28T20:47:00.003051+00:00	{u'units': u'kw', u'tz': u'Pacific', u'type': u'float'}	Cam-pusA/Building1/Device1/Power_KW	cam-pusA/building1/device1/power_kw
1970-01-01T00:00:00Z	2017-12-28T20:47:00.003051+00:00	{u'units': u'kwh', u'tz': u'Pacific', u'type': u'float'}	Cam-pusA/Building1/Device1/Energy_KWH	cam-pusA/building1/device1/energy_kwh

In the InfluxDB, *last\_updated*, *meta\_dict* and *topic* are *fields* and *topic\_id* is a *tag*.

Since InfluxDB is a time series database, the *time* column is required, and a dummy value (*time*=0, which is 1970-01-01T00:00:00Z based on epoch unix time) is assigned to all topics for easier metadata updating. Hence, if the contents of *meta\_dict* change for a specific topic, both *last\_updated* and *meta\_dict* values for that topic will be replaced in the table.

## Mongo Historian

MongoDB is a NoSQL document database, which allows for great performance for transactional data. Because MongoDB documents do not have a schema, it is easy to store and query data which changes over time. MongoDB also scales horizontally using sharding.

**Note:** The MongoDBHistorian is located within the **unsupported** directory.

```
services/unsupported/MongodbHistorian/
```

For more information about MongoDB, read the [MongoDB documentation](#)

## Prerequisites

### 1. Mongodb

Setup mongodb based on using one of the three installation scripts for the corresponding environment:

1. Install as root on Redhat or Cent OS

```
sudo scripts/historian-scripts/root_install_mongo_rhel.sh
```

The above script will prompt user for os version, db user name, password and database name. Once installed you can start and stop the service using the command:

```
**sudo service mongod [start|stop|service]**
```

2. Install as root on Ubuntu

```
sudo scripts/historian-scripts/root_install_mongo_ubuntu.sh
```

The above script will prompt user for os version, db user name, password and database name. Once installed you can start and stop the service using the command:

```
**sudo service mongod [start|stop|service]**
```

3. Install as non root user on any Linux machine

```
scripts/historian-scripts/install_mongodb.sh
```

Usage:

```
install_mongodb.sh [-h] [-d download_url] [-i install_dir] [-c config_
↪file] [-s]
```

Optional arguments:

- s setup admin user and test collection after install and startup
- d download url. defaults to [https://fastdl.mongodb.org/linux/mongodb-linux-x86\\_64-3.2.4.tgz](https://fastdl.mongodb.org/linux/mongodb-linux-x86_64-3.2.4.tgz)
- i install\_dir. defaults to current\_dir/mongo\_install
- c config file to be used for mongodb startup. Defaults to default\_mongodb.conf in the same directory as this script. Any data path mentioned in the config file should already exist and should have write access to the current user
- h print the help message

## 2. Mongodb connector

This historian requires a mongodb connector installed in your activated VOLTTRON virtual environment to talk to MongoDB. Please execute the following from an activated shell in order to install it:

```
python bootstrap.py --mongo
```

or

```
python bootstrap.py --databases
```

or

```
pip install pymongo==3.7.2
pip install bson
pip install ujson
```

## 3. Configuration Options

The historian configuration file can specify

```
"history_limit_days": <n days>
```

which will remove entries from the data and rollup collections older than  $n$  days. Timestamps passed to the `manage_db_size` method are truncated to the day.

## MQTT Historian

### Overview

The MQTT Historian agent publishes data to an MQTT broker. The `mqttlistener.py` script will connect to the broker and print all messages.

---

**Note:** The MQTT Historian is located within the **core** directory.

```
services/core/MQTTHistorian/
```

---

### Dependencies

The Paho MQTT library from Eclipse is needed for the agent and can be installed with:

```
pip install paho-mqtt
```

The Mosquitto MQTT broker may be useful for testing and can be installed with

```
apt-get install mosquitto
```

## OpenEIS Historian

An OpenEIS Historian has been developed to integrate real time data ingestion into the OpenEIS platform. In order for the OpenEIS Historian to be able to communicate with an OpenEIS server a datasource must be created on the OpenEIS server.

**Note:** The OpenEIS Historian is located within the **core** directory.

```
services/core/OpenEISHistorian/
```

The process of creating a dataset is documented in the [OpenEIS User's Guide](#) under *Creating a Dataset* heading.

## Configuration

Once a dataset is created you will be able to add datasets through the configuration file. An example configuration for the historian is as follows:

```
{
  # The agent id is used for display in volttron central.
  "agentid": "openeishistorian",
  # The vip identity to use with this historian.
  # should not be a platform.historian!
  #
  # Default value is un referenced because it listens specifically to the bus.
  #"identity": "openeis.historian",

  # Require connection section for all historians. The openeis historian
  # requires a url for the openis server and login credentials for publishing
  # to the correct user's dataset.
  "connection": {
    "type": "openeis",
    "params": {
      # The server that is running openeis
      # the rest path for the dataset is dataset/append/{id}
      # and will be populated from the topic_dataset list below.
      "uri": "http://localhost:8000",

      # Openeis requires a username/password combination in order to
      # login to the site via rest or the ui.
      #
      "login": "volttron",
      "password": "volttron"
    }
  },

  # All datasets that are going to be recorded by this historian need to be
  # defined here.
  #
  # A dataset definition consists of the following parts
  #   "dsl": {
  #
  #       The dataset id that was created in openeis.
  #       "dataset_id": 1,
  #
  #
```

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```

#         Setting to 1 allows only the caching of data that actually meets
#         the mapped point criteria for this dataset.
#         Defaults to 0
#         "ignore_unmapped_points": 0,
#
#         An ordered list of points that are to be posted to openeis. The
#         points must contain a key specifying the incoming topic with the
#         value an openeis schema point:
#         [
#             {"rtu4/OutsideAirTemp": "campus1/building1/rtu4/OutdoorAirTemperature
↪"}]
#         ]
#     },
    "dataset_definitions": {
        "ds1": {
            "dataset_id": 1,
            "ignore_unmapped_points": 0,
            "points": [
                {"campus1/building1/OutsideAirTemp": "campus1/building1/
↪OutdoorAirTemperature"},
                {"campus1/building1/HVACStatus": "campus1/building1/HVACStatus"},
                {"campus1/building1/CompressorStatus": "campus1/building1/
↪LightingStatus"}
            ]
        }
    },
    #,
    "ds2": {
#         "id": 2,
#         "points": [
#             "rtu4/OutsideAirTemp",
#             "rtu4/MixedAirTemp"
#         ]
#     }
    }
}

```

## SQL Historian

An SQL Historian is available as a core service (*services/core/SQLHistorian* in the VOLTTRON repository).

The SQL Historian has been programmed to handle for inconsistent network connectivity (automatic re-connection to tcp based databases). All additions to the historian are batched and wrapped within a transaction with commit and rollback functions. This allows the maximum throughput of data with the most protection.

**Note:** The SQL Historian is located within the **core** directory.

```
services/core/SQLHistorian/
```

## Configuration

The following example configurations show the different options available for configuring the SQL Historian Agent:

### MySQL Specifics

MySQL requires a third party driver (mysql-connector) to be installed in order for it to work. Please execute the following from an activated shell in order to install it.

```
pip install --allow-external mysql-connector-python mysql-connector-python
```

or

```
python bootstrap.py --mysql
```

or

```
python bootstrap.py --databases
```

In addition, the mysql database must be created and permissions granted for select, insert and update before the agent is started. In order to support timestamp with microseconds you need at least MySql 5.6.4. Please see this [MySql documentation](#) for more details

The following is a minimal configuration file for using a MySQL based historian. Other options are available and are documented <http://dev.mysql.com/doc/connector-python/en/connector-python-connectargs.html>. **Not all parameters have been tested, use at your own risk.**

```
{
  "agentid": "sqlhistorian-mysql",
  "connection": {
    "type": "mysql",
    "params": {
      "host": "localhost",
      "port": 3306,
      "database": "volttron",
      "user": "user",
      "passwd": "pass"
    }
  }
}
```

### Sqlite3 Specifics

An Sqlite Historian provides a convenient solution for under powered systems. The database is a parameter to a location on the file system; 'database' should be a non-empty string. By default, the location is relative to the agent's installation directory, however it will respect a rooted or relative path to the database.

If 'database' does not have a rooted or relative path, the location of the database depends on whether the volttron platform is in agent isolation mode. For more information on agent isolation mode, see [Running-Agents-as-Unix-User](#). In agent isolation mode, the location will be under <install\_dir>/<agent name>.agent-data directory because this will be the only directory in which the agent will have write-access. In regular mode, the location will be under <install\_dir>/data for backward compatibility.

The following is a minimal configuration file that uses a relative path to the database.

```
{
  "agentid": "sqlhistorian-sqlite",
  "connection": {
    "type": "sqlite",
    "params": {
      "database": "data/historian.sqlite"
    }
  }
}
```

## PostgreSQL and Redshift

### Installation notes

1. The PostgreSQL database driver supports recent PostgreSQL versions. It has been tested on 10.x, but should work with 9.x and 11.x.
2. The user must have SELECT, INSERT, and UPDATE privileges on historian tables.
3. The tables in the database are created as part of the execution of the SQL Historian Agent, but this will fail if the database user does not have CREATE privileges.
4. Care must be exercised when using multiple historians with the same database. This configuration may be used only if there is no overlap in the topics handled by each instance. Otherwise, duplicate topic IDs may be created, producing strange results.
5. Redshift databases do not support unique constraints. Therefore, it is possible that tables may contain some duplicate data. The Redshift driver handles this by using distinct queries. It does not remove duplicates from the tables.

### Dependencies

The PostgreSQL and Redshift database drivers require the *psycopg2* Python package.

From an activated shell execute:

```
pip install psycopg2-binary
```

## PostgreSQL and Redshift Configuration

The following are minimal configuration files for using a psycopg2-based historian. Other options are available and are [documented](#).

**Warning:** Not all parameters have been tested, use at your own risk.



## Local PostgreSQL Database

The following snippet demonstrates how to configure the SQL Historian Agent to use a PostgreSQL database on the local system that is configured to use Unix domain sockets. The user executing VOLTTRON must have appropriate privileges.

```
{
  "connection": {
    "type": "postgresql",
    "params": {
      "dbname": "volttron"
    }
  }
}
```

## Remote PostgreSQL Database

The following snippet demonstrates how to configure the SQL Historian Agent to use a remote PostgreSQL database.

```
{
  "connection": {
    "type": "postgresql",
    "params": {
      "dbname": "volttron",
      "host": "historian.example.com",
      "port": 5432,
      "user": "volttron",
      "password": "secret"
    }
  }
}
```

## TimescaleDB Support

Both of the above PostgreSQL connection types can make use of TimescaleDB's high performance Hypertable backend for the primary time-series table. The agent assumes you have completed the TimescaleDB installation and setup the database by following the instructions [here](#).

To use, simply add `timescale_dialect: true` to the connection params in the Agent Config as below:

```
{
  "connection": {
    "type": "postgresql",
    "params": {
      "dbname": "volttron",
      "host": "historian.example.com",
      "port": 5432,
      "user": "volttron",
      "password": "secret",
      "timescale_dialect": true
    }
  }
}
```

## Redshift Database

The following snippet demonstrates how to configure the SQL Historian Agent to use a Redshift database.

```
{
  "connection": {
    "type": "redshift",
    "params": {
      "dbname": "volttron",
      "host": "historian.example.com",
      "port": 5432,
      "user": "volttron",
      "password": "secret"
    }
  }
}
```

## Data Mover Historian

The Data Mover sends data from its platform to a remote platform in cases where there are not sufficient resources to store data locally. It shares this functionality with the *Forward Historian*, however the Data Mover does not have the goal of data appearing “live” on the remote platform. This allows DataMover to be more efficient by both batching data and by sending an RPC call to a remote historian instead of publishing data on the remote message bus. This allows the Data Mover to be more robust by ensuring that the receiving historian is running. If the target is unreachable, the Data Mover will cache data until it is available.

---

**Note:** The Data Mover Historian is located within the **core** directory.

```
services/core/DataMover/
```

---

## Configuration

The default configuration file is *services/core/DataMover/config*. Change the *destination-vip* value to point towards the foreign Volttron instance.

The following is an example configuration:

```
{
  "destination-vip": "ipc://@/home/volttron/.volttron/run/vip.socket",
  "destination-serverkey": null,
  "required_target_agents": [],
  "custom_topic_list": [],
  "services_topic_list": [
    "devices", "analysis", "record", "datalogger", "actuators"
  ],
  "topic_replace_list": [
    #{"from": "FromString", "to": "ToString"}
  ]
}
```

The *services\_topic\_list* allows you to specify which of the main data topics to forward. If there is no entry, the historian defaults to sending all.

*topic\_replace\_list* allows you to replace portions of topics if needed. This could be used to correct or standardize topics or to replace building/device names with an anonymous version. The receiving platform will only see the replaced values.

Adding the configuration option below will limit the backup cache to *n* gigabytes. This will keep a hard drive from filling up if the agent is disconnected from its target for a long time.

```
"backup_storage_limit_gb": n
```

**See also:**

*Historian Framework*

## Forward Historian

The primary use case for the Forward Historian or Forwarder is to send data to another instance of VOLTTRON as if the data were live. This allows agents running on a more secure and/or more powerful machine to run analysis on data being collected on a potentially less secure/powerful board.

Given this use case, it is not optimized for batching large amounts of data when “live-ness” is not needed. For this use case, please see the *Data Mover Historian*.

---

**Note:** The Forward Historian is located within the **core** directory.

```
services/core/ForwardHistorian/
```

---

Forward Historian can be used to forward data between two ZMQ instances, two RMQ instances, or between ZMQ and RMQ instances. For Forward Historian to establish a successful connection to the destination VOLTTRON instance:

1. forward historian should be configured to connect and authenticate the destination instance, and
2. the remote instance should be configured to accept incoming connection from the forward historian

How we setup the above two depends on the message bus used in source instance and destination instance

## Setup for two ZMQ VOLTTRON instance or a ZMQ and RabbitMQ VOLTTRON instance

When forwarder is used between two ZeroMQ instances it relies on the CurveMQ authentication mechanism used by ZMQ based VOLTTRON. When the communication is between a ZeroMQ and RabbitMQ instance, the forward historian uses the proxy ZMQ router agent on the RabbitMQ instance and hence once again uses the CurveMQ authentication

**See also:**

For more details about VIP authentication in ZMQ based VOLTTRON refer to *VIP Authentication*

## Configuring Forwarder Agent

At a minimum, a forward historian's configuration should contain enough details to connect to and authenticate the remote destination. For this it needs

1. the destination's *VIP address* (*destination-vip*)
2. the public key of the destination server (*destination-serverkey*)

There are two ways to provide these information

### Minimum configuration: Option 1

Provide the needed information in the configuration file. For example

```
{  
  "destination-vip": "tcp://172.18.0.4:22916"  
  "destination-serverkey": "D3tIAPOff7wS3787FgEOLjoPfXUT9rAGpv80ryloZGE"  
}
```

The destination server key can be found by running the following command on the **destination volttron instance**:

```
vctl auth serverkey
```

---

**Note:** The example above uses the local IP address, the IP address for your configuration should match the intended target

---

An example configuration with above parameters is available at *services/core/ForwardHistorian/config*.

### Minimum configuration: Option 2

If the destination volttron instance is web enabled then the forward historian can find the destination's vip address and public key using the destination's web discovery page. All web enabled volttron instances provide a **<instance's web address>/discovery/** page that provides the following server information

1. server key
2. vip address
3. instance name
4. RabbitMQ server's AMQP address (Only on RabbitMQ instances)
5. RabbitMQ server's CA cert (Only on RabbitMQ instances)

To forward data to a web enabled volttron instance, forwarder can configured with the destination's web address instead of destination's vip address and public key. For example

```
{  
  "destination-address": "https://centvolttron2:8443"  
}
```

An example configuration with above parameters is available at *services/core/ForwardHistorian/config\_web\_address*.

## Optional Configurations

The most common use case for a forwarder is to forward data to a remote historian. Therefore, forward historians' by default forward the default topics a historian subscribes to - devices, analysis, log, and record. However, a forward historian can be configured to forward any custom topic or disable forwarding devices, analysis, log and/or record topic data. For example

```
{
  "destination-address": "https://centvolttron2:8443",
  "custom_topic_list": ["heartbeat"],
  "capture_log_data": false
}
```

See [Configuration Options](#) for all available forward historian configuration

Since forward historian extends BaseHistorian all BaseHistorian's configuration can be added to forwarder. Please see [BaseHistorian Configurations](#) for the list of available BaseHistorian configurations

## Installation

Once we have our configuration file ready we can install the forwarder agent using the command

```
vctl install --agent-config <path to config file> services/core/ForwardHistorian
```

But before we start the agent we should configure the destination volttron instance to accept the connection from the forwarder.

## Configuring destination volttron instance

When a forwarder tries to connect to a destination volttron instance, the destination instance will check the ip address of the source and public key of connecting agent against its list of accepted peers. So before forwarder can connect to the destination instance, we should add these two details to the destination's auth.json file.

To do this we can use the command

```
vctl auth add --address <address of source instance where forwarder is installed> --
↪credentials <publickey of installed forwarder agent>
```

Only the address and credential keys are mandatory. You can add additional fields such as comments or user id for reference. In the above command address is the ip address of the source instance in which the forwarder is installed. Credentials is the public key of the installed forwarder agent. You can get the forwarder agent's public key by running the following command on the **source instance**

```
vctl auth publickey <agent uuid or name>
```

### See also:

For more details about VIP authentication in ZMQ based VOLTTRON refer to [VIP Authentication](#)

## Setup for two RabbitMQ VOLTTRON instances

RabbitMQ based VOLTTRON instances use x509 certificate based authentication. A forward historian that forwards data from one RMQ instance to another RMQ instance would need a x509 certificate that is signed by the destination volttron instance's root certificate for authentication. To obtain a signed certificate, on start, the forward historian creates a certificate signing request (CSR) and sends it to destination's instance for approval. An admin on the destination end, needs to login into the admin web interface and approve the request. On approval a certificate signed by the destination CA is returned to the forward historian and the forward historian can use this certificate for communication.

### See also:

For more details about CSR approval process see [Agent communication to Remote RabbitMQ instance](#) For an example CSR approval process see [VOLTTRON Central Multi-Platform Multi-Bus Demo](#)

## Forwarder Configuration

Since destination instance would have web enabled to approve the incoming CSR requests, forward historian can be configured with just the destination instance web address similar to ref:*Minimum configuration: Option 2*<config\_option\_2>

```
{
  "destination-address": "https://centvolttron2:8443"
}
```

On start, the forwarder makes Certificate signing request and retries periodically till the certificate is approved.

## Testing Forward Historian

Once forward historian is configured and installed and the destination is configured to accept incoming connection from the forwarder (either by adding to destination's auth.json as in the case of ZMQ or after CSR is approved in case of RMQ) forwarder can forward any message published to the configured set of topics and re-publish on the destination's messagebus.

## Testing with custom topic

1. Configure Forward historian to forward the topic heartbeat by adding the following to the forward historian's configuration

```
"custom_topic_list": ["heartbeat"],
```

2. If forwarder is not already running start the forwarder agent. If it is already running the configuration change should get picked up automatically in a few seconds.
3. If there are no other agent in the source volttron instance, install a listener agent that periodically publishes to the topic 'heartbeat'

```
vctl install examples/ListenerAgent
```

---

**Note:** As of VOLTTRON 8.0, all agents by default publish a heartbeat message periodically unless the agent explicitly opted out of it. So if you already have other installed agents that publish heartbeat message you don't have to add the listener agent

---

4. On the destination instance install a listener agent and tail the volttron log file. You should be able to see the listener or any other source agent's heartbeat message on the destination volttron's log file

### Testing with default topics

Forward historian by default forwards the default topics a historian subscribes to - devices, analysis, log, and record. On the source instance, we can install a platform driver and configure it with a fake device to publish data to the devices topic. Once the platform driver is started and data gets published to the devices topic, forwarder can re-publish these to the destination message bus

1. Configure and install forward historian as explained in the sections above
2. Configure destination to accept incoming connection as explained in the above sections
3. Shutdown source volttron instance

```
vctl shutdown --platform
```

4. On source install platform driver using the below vcfg command. When prompted, choose to configure a fake device for the platform driver

```
vcfg --agent platform_driver
```

Below is an example command with prompts

```
(volttron) [volttron@centvolttron1 myvolttron]$ vcfg --agent platform_driver

Your VOLTTRON_HOME currently set to: /home/volttron/vhomes/rmq_instance1

Is this the volttron you are attempting to setup? [Y]:
Configuring /home/volttron/git/myvolttron/services/core/PlatformDriverAgent.
['volttron', '-vv', '-l', '/home/volttron/vhomes/rmq_instance1/volttron.cfg.log']
Would you like to install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: n
```

5. Start source volttron instance

```
./start-volttron
```

6. Start platform driver and forwarder on source volttron instance
7. On the destination volttron instance install a listener agent and tail the volttron log. You should see the devices data periodically getting logged in the destination volttron instance.

## 2.14 Web Framework

This document describes the interaction between web enabled agents and the Platform Web Service agent.

The web framework enables agent developers to expose JSON, static, and websocket endpoints.

**Note:** The Platform Web Service Agent also provides a RESTful API which can be used to interact with the VOLTTRON Platform, the documentation for which can be found [here](#).

## 2.14.1 Web SubSystem

### Enabling

The web subsystem is not enabled by default as it is only required by a small subset of agents. To enable the web subsystem the platform instance must have an enabled the web server and the agent must pass `enable_web=True` to the agent constructor.

```
class WebAgent(Agent):
    def __init__(self, **kwargs):
        super(WebAgent, self).__init__(enable_web=True, **kwargs)
```

### MANIFEST File

The MANIFEST.in file is used to package additional files needed for your web enabled agent. Please read the python packaging [documentation](#) on the MANIFEST.in file. For most cases, i.e. when you only need to include a webroot directory for html and javascript, the manifest file only needs to include the *recursive-include* command. For example, the entirety of the VolttronCentral MANIFEST.in file is:

```
recursive-include volttroncentral/webroot *
```

The MANIFEST.in file should be located in the root directory of the agent. All pathing for the MANIFEST.in file commands are relative to this root directory.

### Routes

The web subsystem allows an agent to register three different types of routes; file paths, endpoints, and websockets.

---

**Note:** For all routes the first match wins. Therefore ordering which routes are registered first becomes important.

---

### File Path

A path-based route that allows the agent to specify a prefix and a static path on the file system to serve static files. The prefix can be a regular expression.

---

**Note:** The static path should point to a location within the installed agent's agent-data directory. You **MUST** have read access to the directory.

---

The below example is based on the registered route in VolttronCentral.

```
@Core.receiver('onstart')
def onstart(self, sender, **kwargs):
    """
    Allow serving of static content from 'webroot'
    """
    # Sets WEB_ROOT to be the path to the webroot directory
    # in the agent-data directory of the installed agent..
    WEB_ROOT = os.path.abspath(p.abspath(p.join(p.dirname(__file__), 'webroot/')))
    # Serves the static content from 'webroot' directory
    self.vip.web.register_path(r'^/vc/.*', WEB_ROOT)
```



## Endpoint

JSON endpoints allows an agent to serve data responses to specific queries from a web client's non-static responses. The agent will pass a callback to the subsystem which will be called when the endpoint is triggered.

```
def jsonrpc(env, data):
    """
    The main entry point for jsonrpc data
    """
    return {'dynamic': 'data'}

@Core.receiver('onstart')
def onstart(self, sender, **kwargs):
    """
    Register the /vc/jsonrpc endpoint for doing json-rpc based methods
    """
    self.vip.web.register_endpoint(r'/vc/jsonrpc', self.jsonrpc)
```

## Websocket

Websocket endpoints allow bi-directional communication between the client and the server. Client connections can be authenticated during the opening of a websocket through the response of an open callback.

```
def _ws_opened(self, fromip, endpoint):
    _log.debug("OPENED ip: {} endpoint: {}".format(fromip, endpoint))

def _ws_closed(self, endpoint):
    _log.debug("CLOSED endpoint: {}".format(endpoint))

def _ws_received(self, endpoint, message):
    _log.debug("RECEIVED endpoint: {} message: {}".format(endpoint,
                                                            message))

@Core.receiver('onstart')
def onstart(self, sender, **kwargs):
    self.vip.web.register_websocket(r'/vc/ws', self._ws_opened, self._ws_closed, self.
    ↪_ws_received)
```

## 2.15 Simulation Integration Framework

This framework provides a way to integrate different types of simulation platforms with VOLTTRON. Integration with specific simulation platforms are all built upon the *BaseSimIntegration* class which provides common APIs needed to interface with different types of simulation platforms. Each of the concrete simulation class extends the *BaseSimIntegration* class and is responsible for interfacing with a particular simulation platform. Using these concrete simulation objects, agents will be able to use the APIs provided by them to participate in a simulation, send inputs to the simulation and receive outputs from the simulation and act on them. Currently, we have implementations for integrating with HELICS, GridAPPSD and EnergyPlus. If one wants to integrate with a new simulation platform, then one has to extend the *BaseSimIntegration* class and provide concrete implementation for each of the APIs provided by the *BaseSimIntegration* class. For details on the *BaseSimIntegration* class, please refer to `volttron/platform/agent/base_simulation_integration/base_sim_integration.py`

### 2.15.1 Specification For Simplifying Integration With Simulation Platforms

There are several simulation platforms that can be integrated with VOLTTRON to run as a single cohesive simulated environment for different type of applications. Some of the platforms are FNCS, HELICS, GridAPPS-D and EnergyPlus. They all have unique application areas and differ in the type of simulations they run, inputs they accept and outputs they produce. There are some similarities in the some of the basic steps of integrating with VOLTTRON such as:

1. Start simulation
2. Subscribe to outputs from the simulation
3. Publish outputs from simulation to VOLTTRON
4. Subscribe to topics from VOLTTRON
5. Send inputs to simulation
6. Advance simulation time step
7. Pause simulation
8. Resume simulation
9. Stop simulation

Currently, VOLTTRON has individual implementations for integrating with many of the above simulation platforms. For example, an example of integrating with GridAPPSD can be found in *examples/GridAPPSD/gridappsd\_example/agent.py*. EnergyPlus agent can be found in *examples/EnergyPlusAgent/energyplus/agent.py*. These implementations will still be available for users. Instead, in this specification we are proposing a base simulation integration class that will provide common APIs and concrete simulation integration classes that will have implementation of the these APIs as per the needs of the individual simulation platforms. Users can use appropriate simulation classes based on which simulation platform they want to integrate with.

#### Features

1. Start simulation

This will start the simulation or register itself to be participant in the simulation.

2. Register for inputs from simulation

A list of points need to be made available in a config file. The inputs are then read from the config file and registered with simulation platform. Whenever there is any change in those particular points, they are made available to this class to process. The agent using this class object can process it or publish it over VOLTTRON message bus to be consumed by other agents.

3. Send inputs to simulation

Send inputs such as set points (for example, charge\_EV5), data points etc to the simulation. The simulation would then act on these inputs.

4. **Receive outputs from simulation** Receive outputs generated by the simulation (for example, OutdoorAirTemperature for a energyPlus simulation). The agent can then act on these output values. If the config file has an associated topic, the output value will be republished on the VOLTTRON message bus.

5. Simulation time management

Typically, in a simulation environment, one can run applications in real time mode or in fast execution mode. All the participants in the simulation have to be in sync with respect to time for simulation to be correct. There is typically a central unit which acts as a global timekeeper. This timekeeper can possibly be configured to use periodic time keeping, which means it periodically advances in

time (based on pre-configured time period) or based on time advancement message. After each advancement, it would send out all the output messages to the registered participants. Another way of advancing the simulation would be based on concept of time request-time grant. Each of the participants would request for certain time after it is done with its work and get blocked until that is granted. The global time keeper would grant time (and hence advance in simulation) that is lowest among the list of time requests and all participants would advance to that time.

6. **Pause the simulation**

Some simulation platforms can pause the simulation if needed. We need provide wrapper API to call simulation specific pause API.

7. **Resume the simulation**

Some simulation platforms can resume the simulation if needed. We need provide API to call simulation specific resume API.

8. **Stop the simulation**

This will unregister itself from the simulation and stop the simulation.

## APIs

1. **start\_simulation()**

- Connect to the simulation platform.
- Register with the platform as a participant

2. **register\_inputs(config=None, callback=None)**

- Register the config containing inputs and outputs with the simulation platform.
- If agent provides a callback method, this will be called when new output values is received from simulation

3. **publish\_to\_simulation(topic, message)**

- Send message to simulation

4. **make\_time\_request(time\_steps)**

- Make request to simulation to advance to next time delta

5. **pause\_simulation()**

- Pause simulation

6. **resume\_simulation()**

- Resume simulation

7. **stop\_simulation()**

- Stops the simulation

8. **is\_sim\_installed()**

- Flag indicating if simulation is installed

## 2.15.2 Configuration for Integrating With Simulation Platforms

Configurations for interfacing with simulation platforms will vary depending on the specifications of that platform but there may be few common configuration options that we can group together as separate sections such as:

- Config parameters that help us setup the simulation such as connection parameters (connection address), unique name for the participant, total simulation time
- List of topics for subscribing with simulation platform
- List of topics for publishing to the simulation platform
- List of topics subscribing with VOLTTRON message bus

We have grouped these four categories of configuration into four different sections - *properties*, *inputs*, *outputs* and *volttron\_subscriptions*. The simulation integration class will read these four sections and register with simulation platform appropriately. If an agent needs to interface with EnergyPlus or HELICS using the simulation integration framework, then it will need to group the configurations into above four sections.

---

**Note:** GridAPPS-D can run complex power system simulations using variety of simulators such as GridLAB-D, HELICS, MatPower etc. So the configuration for GridAPPS-D cannot follow the above format. Because of this, the configuration for GridAPPS-D is taken in the raw format and passed directly to the GridAPPS-D simulation.

---

### Example Configuration

The configuration for interfacing with a simulation platform is described by using integration with HELICS as an example. Each participant in a HELICS co-simulation environment is called a federate.

Below is an example HELICS config file.

```
# Config parameters for setting up HELICS federate
properties:
  name: federate1 # unique name for the federate
  loglevel: 5 # log level
  coreType: zmq # core type
  timeDelta: 1.0 # time delta (defaults to 1s)
  uninterruptible: true
  simulation_length: 360 # simulation length in seconds (defaults to 360s)

# configuration for subscribing to HELICS simulation
outputs:
  # List of subscription information, typically contains
  # - subscription topic,
  # - datatype
  # - publication topic for VOLTTRON (optional) to republish the
  #   message on VOLTTRON message bus
  # - additional/optional simulation specific configuration
  - sim_topic: federate2/totalLoad
    volttron_topic: helics/abc
    type: complex
    required: true
  - sim_topic: federate2/charge_EV6
    volttron_topic: helics/ev6
    type: complex
    required: true
```

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```
# configuration for publishing to HELICS simulation
inputs:
  # List of publication information, containing
  # - HELICS publication topic,
  # - datatype
  # - metadata associated with the topic (for example unit)
  # - subscription topic for VOLTTRON message bus (optional) which can then be
  #   republished on HELICS with HELICS publication topic
  # - additional/optional publication specific configuration
  - sim_topic: pub1 # HELICS publication key
    type: double      # datatype
    unit: m          # unit
    info: this is an information string for use by the application #additional info
    volttron_topic: pub1/all # topic to subscribe on VOLTTRON bus
    global: true
  - sim_topic: pub2
    type: double
    volttron_topic: pub2/all

volttron_subscriptions:
  - feeder0_output/all
```

The properties section may contain the following.

- Unique name for the federate
- core type (for example, zmq, tcp, mpi)
- time step delta in seconds
- total simulation time etc

---

**Note:** The individual fields under this section may vary depending on whether the agent is interfacing with HELICS or EnergyPlus.

---

In the inputs section, list of subscriptions (if any) need to be provided. Each subscription will contain the following.

- subscription topic
- data type
- VOLTTRON topic to republish the message on VOLTTRON message bus (optional)
- required flag (optional)

In the outputs section, list of publications (if any) need to be provided. Each publication will contain the following.

- publication topic
- data type
- metadata associated with the topic
- VOLTTRON topic to subscribe on the VOLTTRON message bus which will be republished on simulation bus (optional)
- additional information (optional)

In the volttron\_subscriptions, list of topics need to be subscribed on VOLTTRON bus can be provided.

### 2.15.3 Integrating With Simulation Platforms

An agent wanting to integrate with a simulation platform has to create an object of concrete simulation integration class (HELICSSimIntegration). This is best described with an example agent. The example agent will interface with HELICS co-simulation platform. For more info about HELICS, please refer to <https://helics.readthedocs.io/en/latest/installation/linux.html>.

```
class HelicsExample (Agent):
    """
    HelicsExampleAgent demonstrates how VOLTTRON agent can interact with HELICS_
    ↪simulation environment
    """
    def __init__(self, config, **kwargs):
        super(HelicsExample, self).__init__(enable_store=False, **kwargs)
        self.config = config
        self.helics_sim = HELICSSimIntegration(config, self.vip.pubsub)
```

#### Register With Simulation Platform

The agent has to first load the configuration file containing parameters such as connection address, simulation duration, input and output topics etc., and register with simulation platform. The concrete simulation object will then register the agent with simulation platform (in this case, HELICS) using appropriate APIs. The registration steps include connecting to the simulation platform, passing the input and outputs topics to the simulation etc. In addition to that, the agent has to provide a callback method in order for the concrete simulation object to pass the messages received from the simulation to the agent. The best place to call the `register_inputs` API is within the `onstart` method of the agent.

```
@Core.receiver("onstart")
def onstart(self, sender, **kwargs):
    """
    Register config parameters with HELICS.
    Start HELICS simulation.
    """
    # Register inputs with HELICS and provide callback method to receive messages_
    ↪from simulation
    try:
        self.helics_sim.register_inputs(self.config, self.do_work)
    except ValueError as ex:
        _log.error("Unable to register inputs with HELICS: {}".format(ex))
        self.core.stop()
    return
```

#### Start the Simulation Platform

After registering with the simulation platform, the agent can start the simulation.

```
# Register inputs with HELICS and provide callback method to receive messages from_
↪simulation
try:
    self.helics_sim.start_simulation()
except ValueError as ex:
    _log.error("Unable to register inputs with HELICS: {}".format(ex))
    self.core.stop()
return
```

## Receive outputs from the simulation

The concrete simulation object spawns a continuous loop that waits for any incoming messages (subscription messages) from the simulation platform. On receiving a message, it passes the message to the callback method registered by the agent during the *register with simulation step*. The agent can now choose to work on the incoming message based on its use case. The agent can also choose to publish some message back to the simulation at this point of time as shown in below example. This is totally optional and is based on agent's use-case. At the end of the callback method, the agent needs to make time request to the simulation, so that it can advance forward in the simulation. Please note, this is a necessary step for HELICS co-simulation integration as the HELICS broker waits for time requests from all its federates before advancing the simulation. If no time request is made, the broker blocks the simulation.

```
def do_work(self):
    """
    Perform application specific work here using HELICS messages
    :return:
    """
    current_values = self.helics_sim.current_values
    _log.debug("Doing work: {}".format(self.core.identity))
    _log.debug("Current set of values from HELICS: {}".format(current_values))
    # Do something with HELICS messages
    # agent specific work!!!

    for pub in self.publications:
        key = pub['sim_topic']
        # Check if VOLTRON topic has been configured. If no, publish dummy value for
        ↪ the HELICS
        # publication key
        volttron_topic = pub.get('volttron_topic', None)
        if volttron_topic is None:
            value = 90.5
            global_flag = pub.get('global', False)
            # If global flag is False, prepend federate name to the key
            if not global_flag:
                key = "{fed}/{key}".format(fed=self._federate_name, key=key)
                value = 67.90
            self.helics_sim.publish_to_simulation(key, value)

    self.helics_sim.make_time_request()
```

## Publish to the simulation

The agent can publish messages to the simulation using `publish_to_simulation` API. The code snippet iterates over all the publication keys (topics) and uses `publish_to_simulation` API to publish a dummy value of 67.90 for every publication key.

```
for pub in self.publications:
    key = pub['sim_topic']
    value = 67.90
    self.helics_sim.publish_to_simulation(key, value)
```

### Advance the simulation

With some simulation platforms such as HELICS, the federate can make explicit time request to advance in time by certain number of time steps. There will be a global time keeper (in this case HELICS broker) which will be responsible for maintaining time within the simulation. In the time request mode, each federate has to request for time advancement after it has completed it's work. The global time keeper grants the lowest time among all time requests. All the federates receive the granted time and advance forward in simulation time together in a synchronized manner. Please note, the granted time may not be the same as the requested time by the agent.

Typically, the best place to make the time request is in the callback method provided to the simulation integration object.

```
self.helics_sim.make_time_request()
```

### Pause the simulation

Some simulation platforms such as GridAPPS-D have the capability to pause the simulation. The agent can make use of this functionality by calling the appropriate wrapper API exposed by the concrete simulation class. In the case of HELICS, we do not have capability of pause/resume simulation, so calling the *pause\_simulation* API will result in no operation.

```
self.helics_sim.pause_simulation()
```

### Resume the simulation

If the simulation platform provides the pause simulation functionality then it will also provide capability to resume the simulation. The agent can call *resume\_simulation* API to resume the simulation. In case of HELICS, we do not have the capability of pause/resume simulation, so calling the *resume\_simulation* API will result in no operation.

```
self.helics_sim.resume_simulation()
```

### Stop the simulation

The agent can stop the simulation at any point of point. In the case of *HELICSSimIntegration* object, it will disconnect the federate from the HELICS core and close the library. Generally, it is a good practice to call the *stop\_simulation* API within the *onstop* method of the agent. In this way, the agent stops the simulation before exiting the process.

```
@Core.receiver("onstop")
def onstop(self, sender, **kwargs):
    """
    This method is called when the Agent is about to shutdown, but before it
    disconnects from the message bus.
    """
    self.helics_sim.stop_simulation()
```



## 2.16 Platform Service Standardization

Service will interact with the message bus through three topics.

- Request - The service agent will listen to incoming requests on this topic
- Response - The service agent will respond on this topic
- Error - The service will “throw” errors on this topic

Agents which are using these services agents should publish to the above Request topic and listen on the Response and Error topics. Response and Errors will retain the header that was sent into the request.

Headers

- Request Headers
- Common Header Formats
- type - Unique type of request for the service agent to handle (If an agent handles more than one request type on a specific topic)
- requesterID - Name of the requesting agent

### 2.16.1 Header List

- type - Unique type of request for the service agent to handle (If an agent handles more than one request type on a specific topic)
- priority - HIGH, LOW, LOW\_PREEMPT (Found in Scheduler and Activator)
- taskId - Unique task among scheduled tasks.
- window - Seconds remaining in timeslot (actuator agent)
- SourceName - used as name to publish to in smap for archiver agent.
- FROM - Same as requestor id (volttron.messaging.headers.FROM)
- CONTENT\_TYPE - volttron.messaging.headers.CONTENT\_TYPE.JSON, volttron.messaging.headers.CONTENT\_TYPE.PLAIN\_TEXT Datalogger location is specified in the message itself.
- Multibuilding
- Cookie

### 2.16.2 Request Formats (Content-Types)

- volttron.messaging.headers.CONTENT\_TYPE.JSON
- volttron.messaging.headers.CONTENT\_TYPE.PLAIN\_TEXT

### 2.16.3 Topic List

- Actuator and Scheduling Agent
  - devices/actuators/schedule/request (NEW\_SCHEDULE request)
  - devices/actuators/schedule/request (CANCEL\_SCHEDULE request)
  - devices/actuators/schedule/response
  - devices/actuators/schedule/announce/[full device path]
  - devices/actuators/schedule/response (Response for preempted task)
  - devices/actuators/get/[full device path]/[ actuation point]
  - devices/actuators/set/[full device path]/[ actuation point]
  - devices/actuators/value/[full device path]/[ actuation point]
  - devices/actuators/error/[full device path]/[ actuation point]
- Archiver Agent
  - archiver/request/[path to the value desired/ full device path]
- Logger Agent
  - datalogger/log/
  - datalogger/log/[path in SMAP for the data point]
  - datalogger/status (Status of the storage request)
- Mobility Agent
  - platform/move/request/[agent id]
  - platform/move/reply/[agent id]
- Multi-Building Agent
  - building/recv/[campus]/[building]/[topic]
  - building/send/[campus]/[building]/[topic]
  - building/error/[campus]/[building]/[topic]
- Weather Agent
  - [Weather agent topic list](#)
- Platform Topics
  - platform/shutdown
  - agent/[agent]/shutdown

## 2.17 Acquiring Third Party Agent Code

Third party agents developed from a variety of sources are available from the volttron-applications repository (<https://github.com/VOLTTTRON/volttron-applications.git>). The current best practice is to have the main volttron and the volttron-applications repository within the same common ancestry folder.

```
volttron-repositories/  
|  
|--- volttron/  
|  
|--- volttron-applications/
```

One can clone the latest applications from the repository via the following command:

```
git clone https://github.com/VOLTTTRON/volttron-applications.git
```

## 2.18 Join the Community

The VOLTTTRON project is transitioning into the Eclipse Foundation as Eclipse VOLTTTRON. Current resources will still be used during this time. Please watch this space!

The Eclipse VOLTTTRON team aims to work with users and contributors to continuously improve the platform with features requested by the community as well as architectural features that improve robustness, security, and scalability. Contributing back to the project, which is encouraged but not required, enhances its capabilities for the whole community. To learn more, check out [Contributing](#) and [Documentation](#).

### 2.18.1 Slack Channel

[volttron-community.slack.com](https://volttron-community.slack.com) is where the VOLTTTRON™ community at large can ask questions and meet with others using VOLTTTRON™. To be added to Slack please email the VOLTTTRON team at [volttron@pnnl.gov](mailto:volttron@pnnl.gov).

### 2.18.2 Mailing List

Join the mailing list by emailing [volttron@pnnl.gov](mailto:volttron@pnnl.gov).

### 2.18.3 Stack Overflow

The VOLTTTRON community supports questions being asked and answered through Stack Overflow. The questions tagged with the *volttron* tag can be found at <http://stackoverflow.com/questions/tagged/volttron>.

## 2.18.4 Office Hours

PNNL hosts office hours every other week on Fridays at 11 AM (PST). These meetings are designed to be very informal where VOLTTRON developers can answer specific questions about the inner workings of VOLTTRON. These meetings are also available for topical discussions of different aspects of the VOLTTRON platform. Currently the office hours are available through a Zoom meeting. To be invited to the link meeting, contact the volttron team via email: <mailto:volttron@pnnl.gov>

Meetings are recorded and can be reviewed [here](#).

## 2.18.5 Publications

VOLTTRON white papers and technical reports can be found at <https://volttron.org/publications>

# 2.19 Setting Up a Development Environment

An example development environment used by the VOLTTRON team would consist of a Linux VM running on the host development machine on which an IDE would be running. The guides can be used to set up a development environment.

## 2.19.1 Forking the Repository

The first step to editing the repository is to fork it into your own user space. Creating a fork makes a copy of the repository in your GitHub for you to make any changes you may require for your use-case. This allows you to make changes without impacting the core VOLTTRON repository.

Forking is done by pointing your favorite web browser to <http://github.com/VOLTTRON/volttron> and then clicking “Fork” on the upper right of the screen. (Note: You must have a GitHub account to fork the repository. If you don’t have one, we encourage you to [sign up](#).)

---

**Note:** After making changes to your repository, you may wish to contribute your changes back to the Core VOLTTRON repository. Instructions for contributing code may be found [here](#).

---

## Cloning ‘YOUR’ VOLTTRON forked repository

The next step in the process is to copy your forked repository onto your computer to work on. This will create an identical copy of the GitHub repository on your local machine. To do this you need to know the address of your repository. The URL to your repository address will be [https://github.com/<YOUR\\_USERNAME>/volttron.git](https://github.com/<YOUR_USERNAME>/volttron.git). From a terminal execute the following commands:

```
# Here, we are assuming you are doing develop work in a folder called `git`. If you'd
↪rather use something else, that's OK.
mkdir -p ~/git
cd ~/git
git clone -b develop https://github.com/<YOUR_USERNAME>/volttron.git
cd volttron
```

---

**Note:** VOLTTRON uses develop as its main development branch rather than the standard *main* branch (the default).

---

## Adding and Committing files

Now that you have your repository cloned, it's time to start doing some modifications. Using a simple text editor you can create or modify any file in the volttron directory. After making a modification or creating a file it is time to move it to the stage for review before committing to the local repository. For this example let's assume we have made a change to *README.md* in the root of the volttron directory and added a new file called *foo.py*. To get those files in the staging area (preparing for committing to the local repository) we would execute the following commands:

```
git add foo.py
git add README.md

# Alternatively in one command
git add foo.py README.md
```

After adding the files to the stage you can review the staged files by executing:

```
git status
```

Finally, in order to commit to the local repository we need to think of what change we actually did and be able to document it. We do that with a commit message (the *-m* parameter) such as the following.

```
git commit -m "Added new foo.py and updated copyright of README.md"
```

## Pushing to the remote repository

The next step is to share our changes with the world through GitHub. We can do this by pushing the commits from your local repository out to your GitHub repository. This is done by the following command:

```
git push
```

## 2.19.2 Installing a Linux Virtual Machine

VOLTTRON requires a Linux system to run. For Windows users this will require a virtual machine (VM).

This section describes the steps necessary to install VOLTTRON using Oracle VirtualBox software. Virtual Box is free and can be downloaded from <https://www.virtualbox.org/wiki/Downloads>.



**VirtualBox**

search...  
Login Preferences

## Download VirtualBox

Here you will find links to VirtualBox binaries and its source code.

### VirtualBox binaries

By downloading, you agree to the terms and conditions of the respective license.

If you're looking for the latest VirtualBox 5.1 packages, see [VirtualBox 5.1 builds](#). Consider upgrading.

### VirtualBox 5.2.12 platform packages

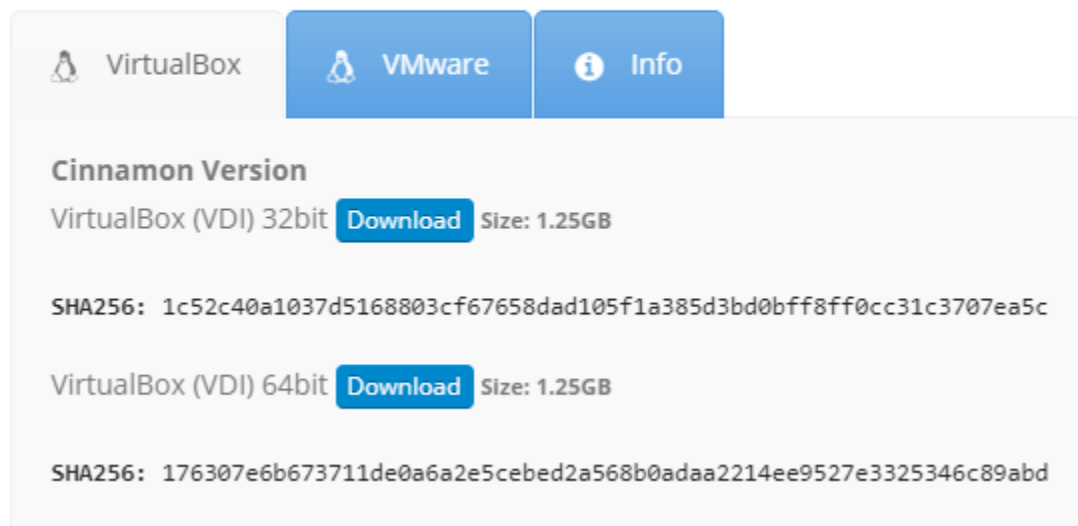
- [Windows hosts](#)
- [OS X hosts](#)
- [Linux distributions](#)
- [Solaris hosts](#)

After installing VirtualBox download a virtual box appliance from <https://www.osboxes.org/linux-mint/> extract the VDI from the downloaded archive, **or** download a system installation disk. VOLTTRON version 7.0.x has been tested using Ubuntu 18.04, 18.10; Linux Mint 19; VOLTTRON version 6.0.x has been tested with Ubuntu 16.04, 18.04. However, any modern apt based Linux distribution should work out of the box. Linux Mint 19.3 with the Xfce desktop is used as an example, however platform setup in Ubuntu should be identical.

**Note:** A 32-bit version of Linux should be used when running VOLTTRON on a system with limited hardware (less than 2 GB of RAM).

## Adding a VDI Image to VirtualBox Environment

### Linux Mint 18.3 Sylvia



VirtualBox VMware Info

#### Cinnamon Version

VirtualBox (VDI) 32bit [Download](#) Size: 1.25GB


SHA256: 1c52c40a1037d5168803cf67658dad105f1a385d3bd0bff8ff0cc31c3707ea5c


VirtualBox (VDI) 64bit [Download](#) Size: 1.25GB


SHA256: 176307e6b673711de0a6a2e5cebed2a568b0adaa2214ee9527e3325346c89abd

The below info holds the VM's preset username and password.

## Linux Mint 18.3 Sylvia

 VirtualBox

 VMware

 Info

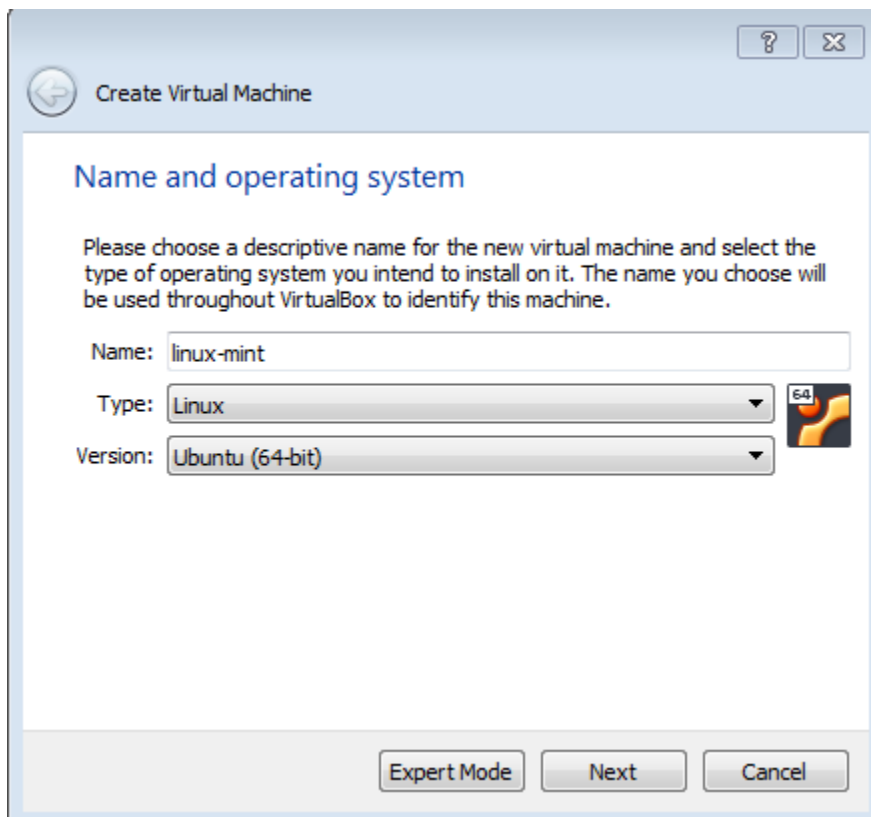
**Username:** osboxes

**Password:** osboxes.org

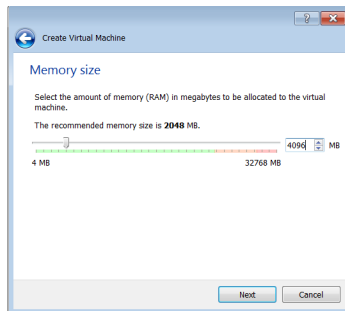
**VB Guest Additions & VMware Tools:** Not Installed

**VMware Compatibility:** Version 10+

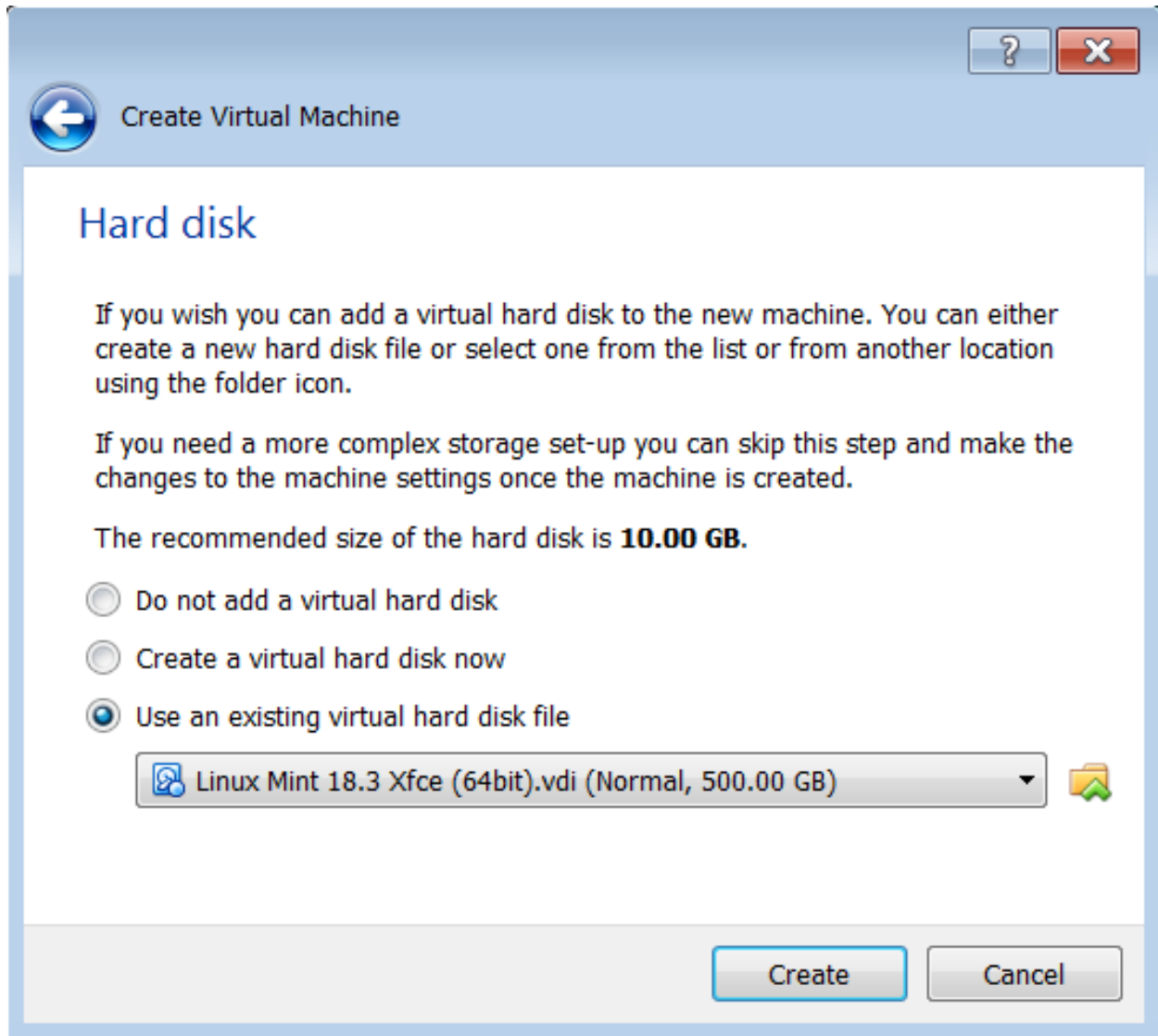
Create a new VirtualBox Image.



Select the amount of RAM for the VM. The recommended minimum is shown in the image below:



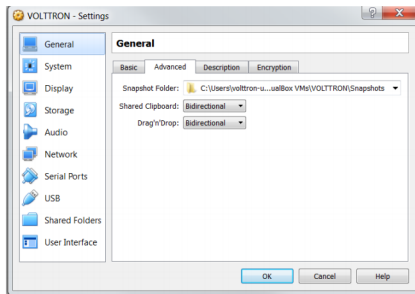
Specify the hard drive image using the extracted VDI file.



With the newly created VM selected, choose Machine from the VirtualBox menu in the top left corner of the VirtualBox window; from the drop down menu, choose Settings.

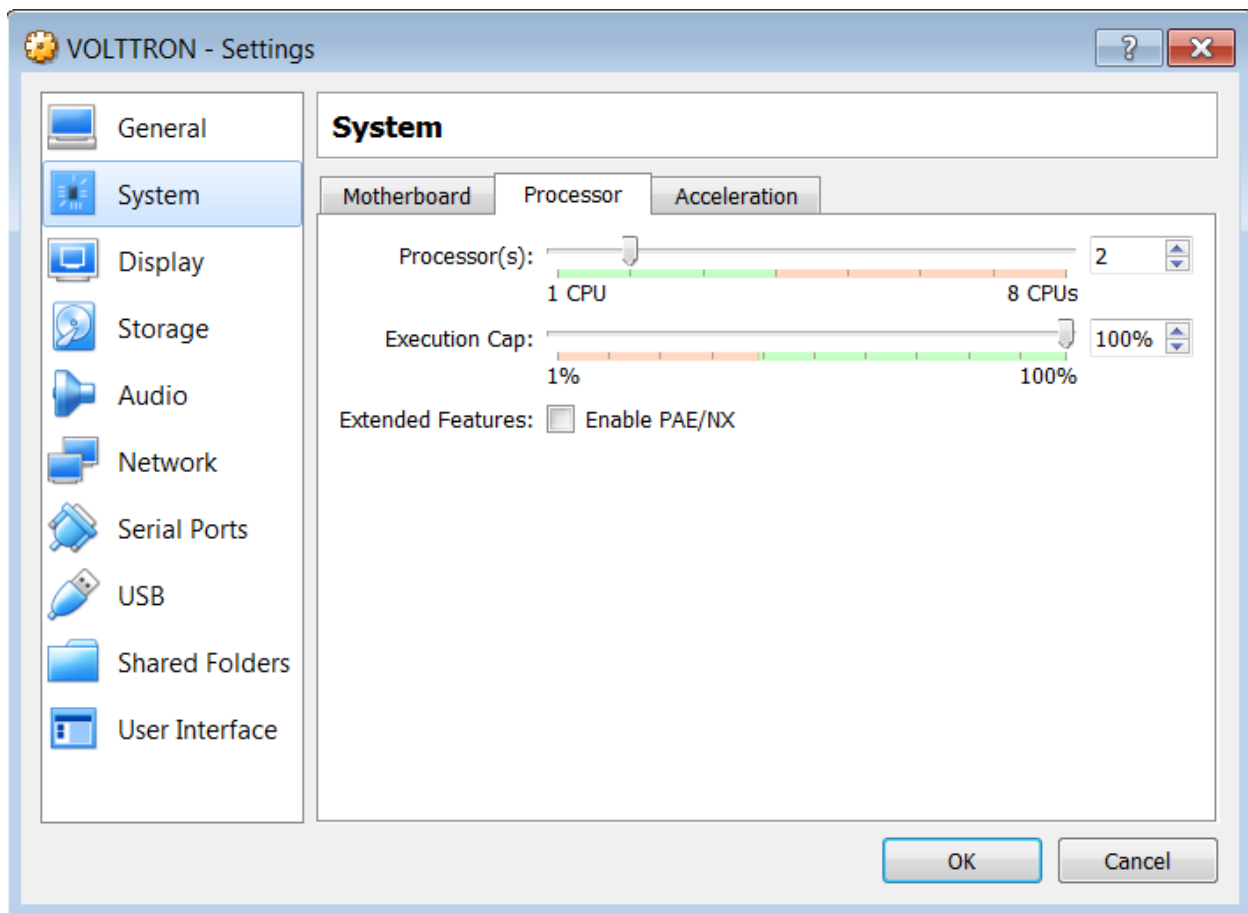
To enable bidirectional copy and paste, select the General tab in the VirtualBox Settings. Enable Shared Clipboard and Drag'n'Drop as Bidirectional.





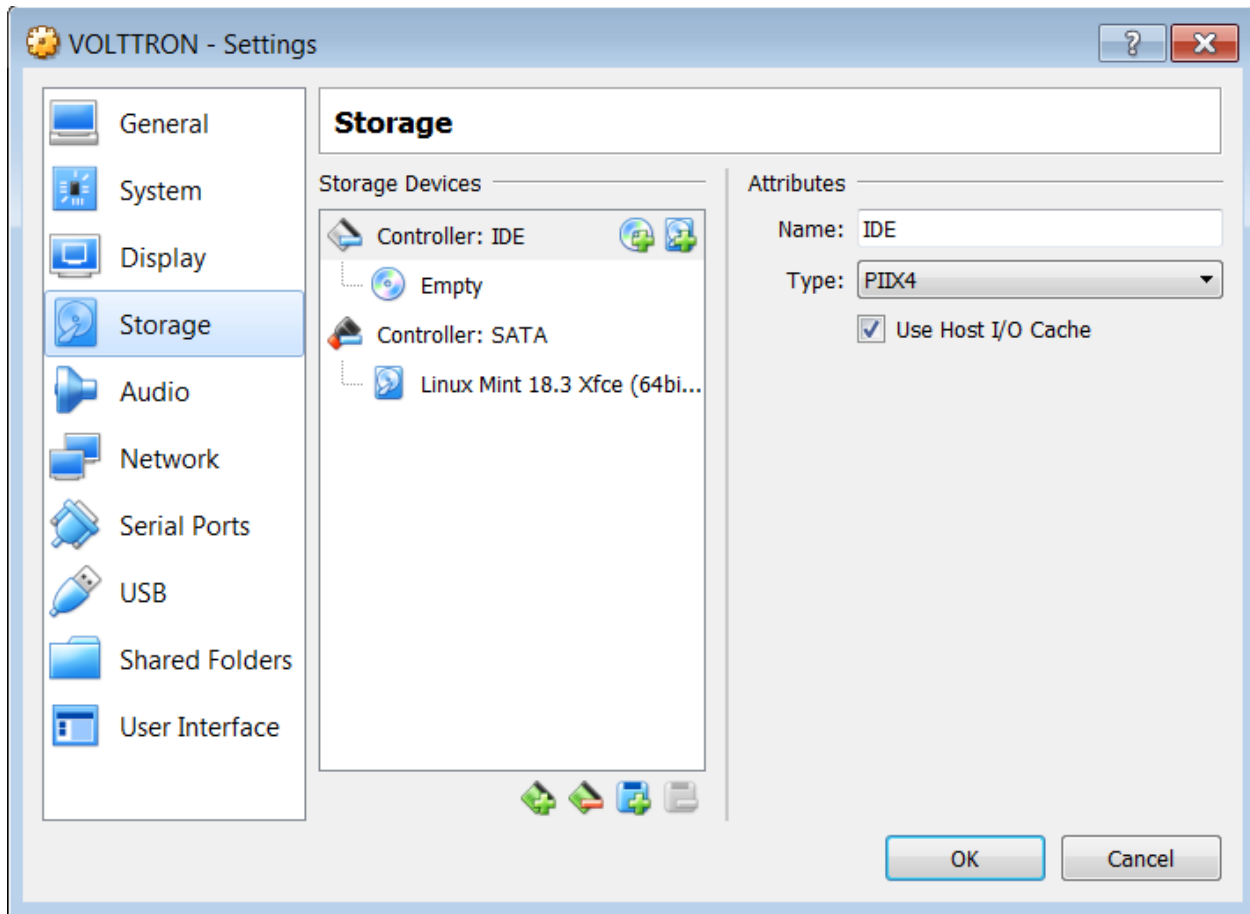
**Note:** Currently, this feature only works under certain circumstances (e.g. copying / pasting text).

Go to System Settings. In the processor tab, set the number of processors to two.



Go to Storage Settings. Confirm that the Linux Mint VDI is attached to Controller: SATA.

**Danger:** Do **NOT** mount the Linux Mint iso for Controller: IDE. **Will result in errors.**



Start the machine by saving these changes and clicking the “Start” arrow located on the upper left hand corner of the main VirtualBox window.

### 2.19.3 Pycharm Development Environment

Pycharm is an IDE dedicated to developing python projects. It provides coding assistance and easy access to debugging tools as well as integration with py.test. It is a popular tool for working with VOLTTRON. JetBrains provides a free community version that can be downloaded from <https://www.jetbrains.com/pycharm/>

#### Open Pycharm and Load VOLTTRON

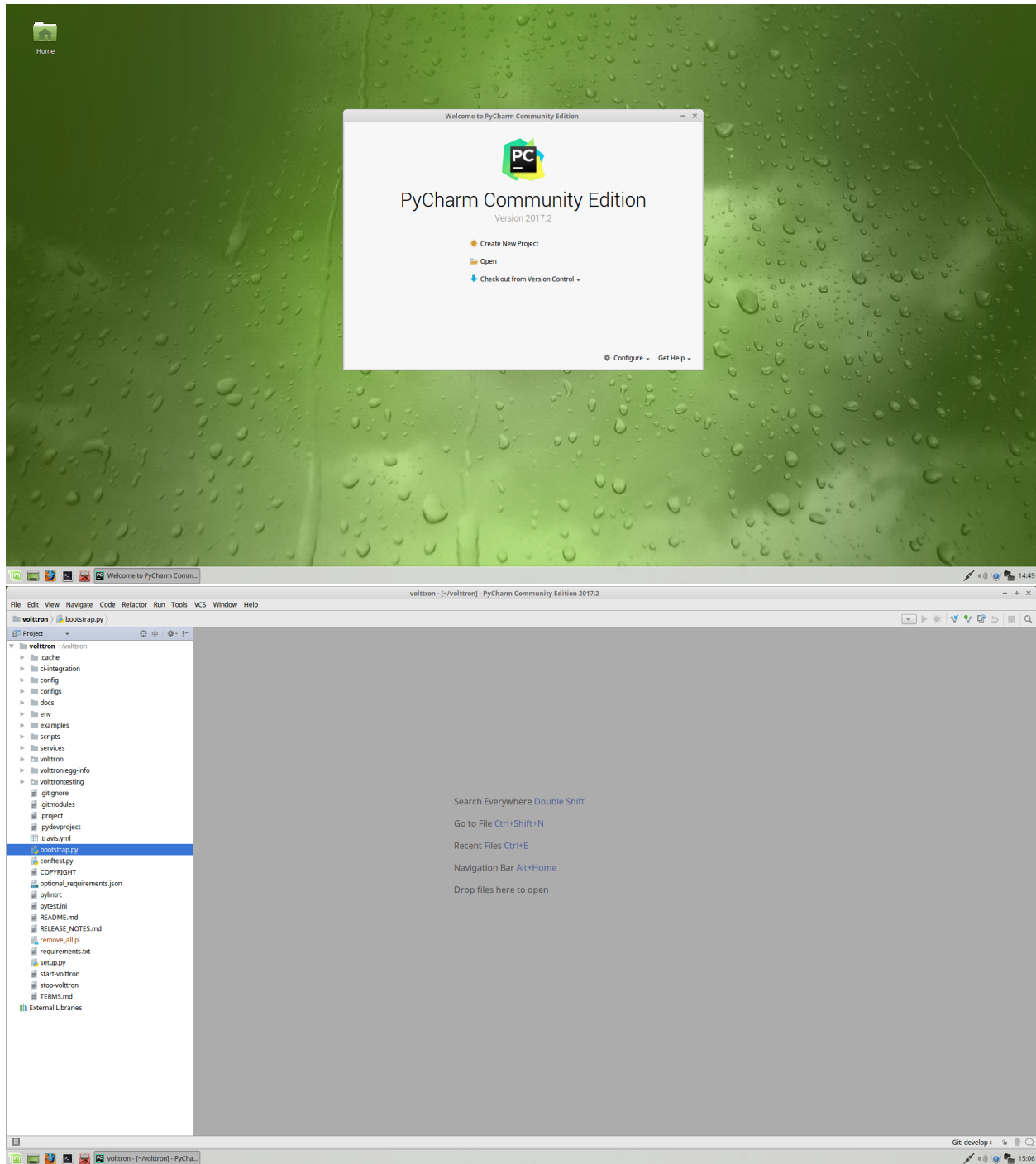
When launching Pycharm for the first time we have to tell it where to find the VOLTTRON source code. If you have already cloned the repo then point Pycharm to the cloned project. Pycharm also has options to access remote repositories.

Subsequent instances of Pycharm will automatically load the VOLTTRON project.

---

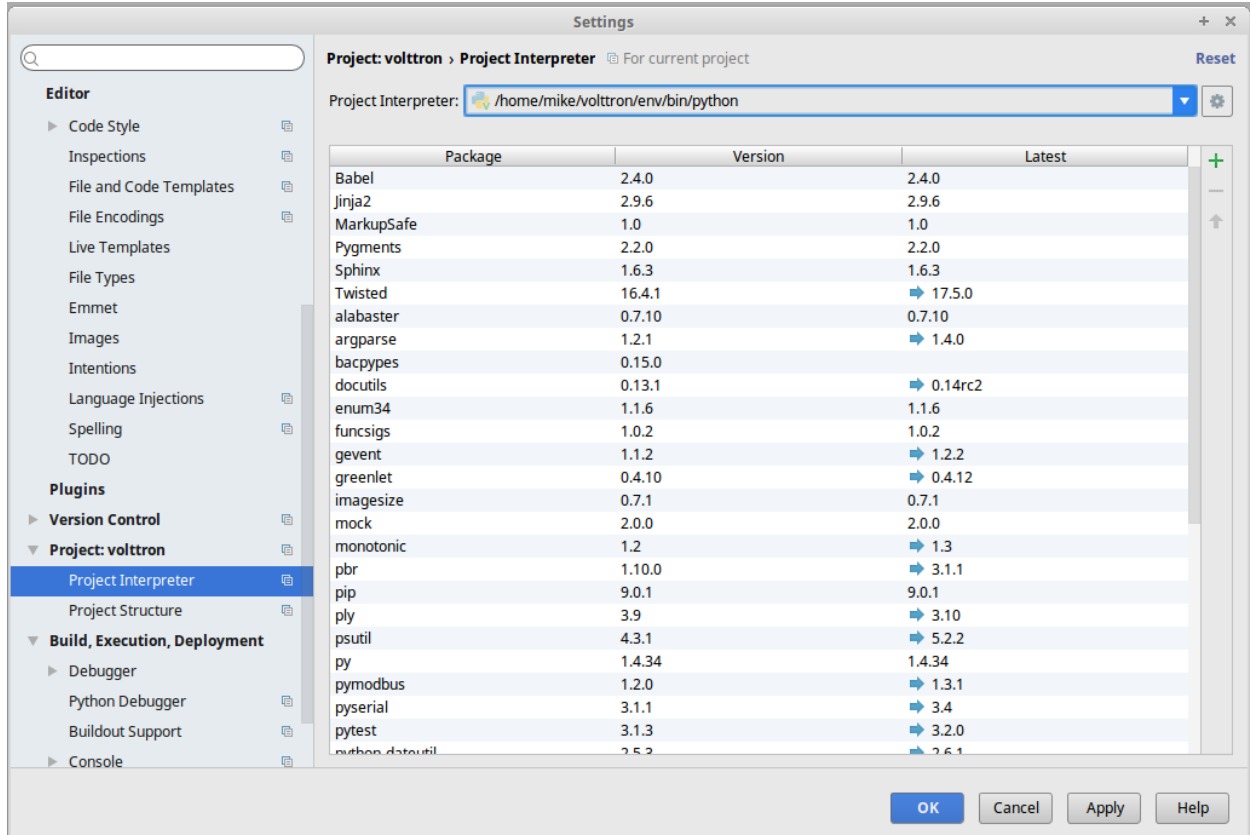
**Note:** When getting started make sure to search for *gevent* in the settings and ensure that support for it is enabled.

---



## Set the Project Interpreter

This step should be completed after running the bootstrap script in the VOLTTRON source directory. Pycharm needs to know which python environment it should use when running and debugging code. This also tells Pycharm where to find python dependencies. Settings menu can be found under the File option in Pycharm.



## Running the VOLTTRON Process

If you are not interested in running the VOLTTRON process itself in Pycharm then this step can be skipped.

In **Run > Edit Configurations** create a configuration that has `<your source dir>/env/bin/volttron` in the script field, `-vv` in the script parameters field (to turn on verbose logging), and set the working directory to the top level source directory.

VOLTTRON can then be run from the Run menu.

The screenshot shows the 'Configuration' tab for a tool named 'volttron'. At the top, there is a 'Name' field with 'volttron' and two checkboxes: 'Share' and 'Single instance only'. Below this are two tabs: 'Configuration' (selected) and 'Logs'. The 'Configuration' tab contains several fields and checkboxes:

- Script:** /home/mike/volttron/env/bin/volttron
- Script parameters:** -vv
- Environment:**
  - Environment variables:** PYTHONUNBUFFERED=1
  - Python interpreter:** Project Default (Python 2.7.6 virtualenv at ~/volttron/env)
  - Interpreter options:** (empty)
  - Working directory:** /home/mike/volttron
- Checkboxes:**
  - ☒ Add content roots to PYTHONPATH
  - ☒ Add source roots to PYTHONPATH
  - ☐ Emulate terminal in output console
  - ☐ Show command line afterwards
- Before launch:** Activate tool window

At the bottom of the configuration panel, there are icons for adding (+), removing (-), and editing (pencil) configurations, as well as up and down arrows for reordering.

## Running an Agent

Running an agent is configured similarly to running VOLTTRON proper. In **Run > Edit Configurations** add a configuration and give it the same name as your agent. The script should be the path to *scripts/pycharm-launch.py* and the script parameter must be the path to your agent's *agent.py* file.

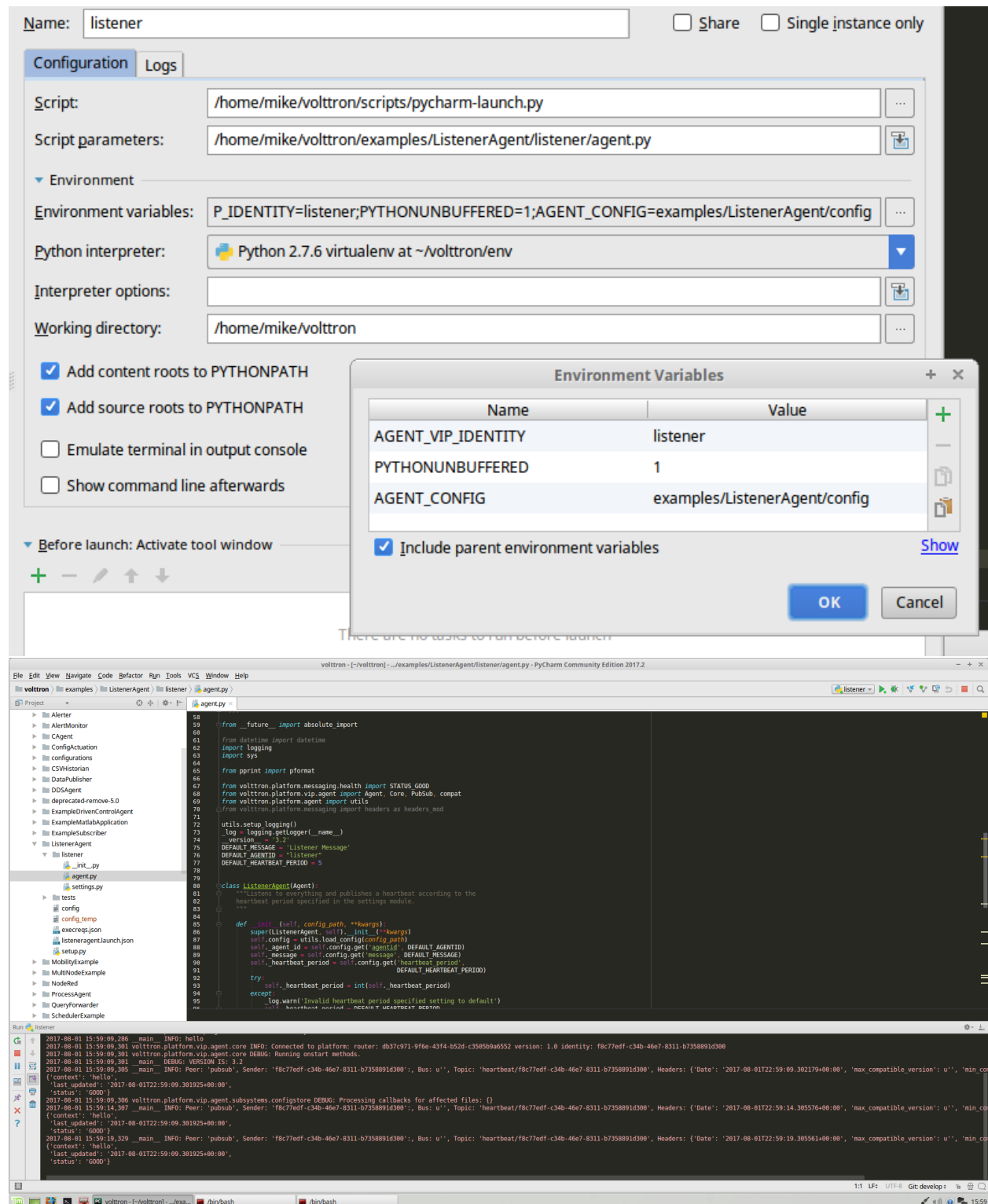
In the Environment Variables field add the variable *AGENT\_CONFIG* that has the path to the agent's configuration file as its value, as well as *AGENT\_VIP\_IDENTITY*, which must be unique on the platform.

A good place to keep configuration files is in a directory called *config* in top level source directory; git will ignore changes to these files.

---

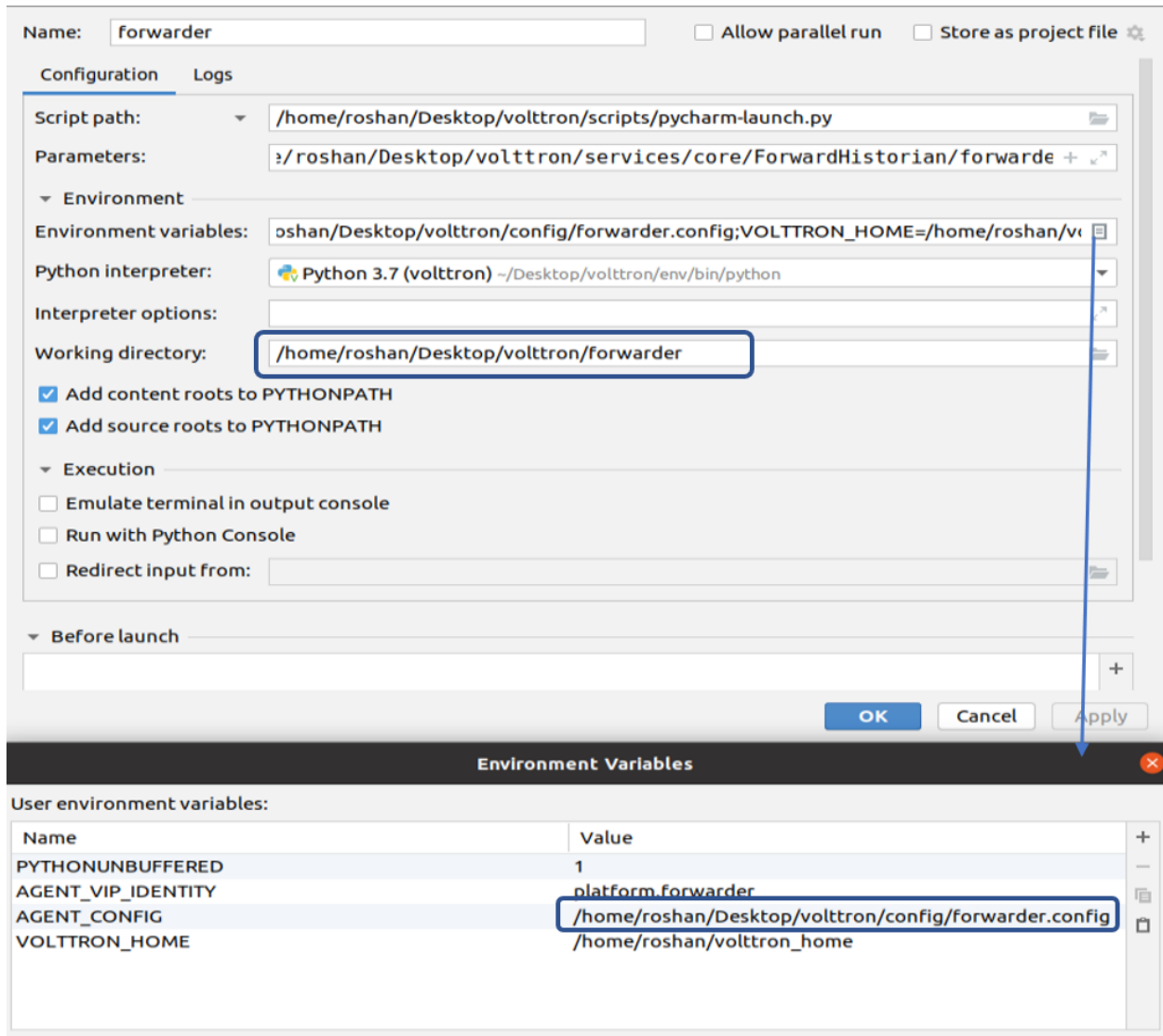
**Note:** There is an issue with imports in Pycharm when there is a secondary file (i.e. not *agent.py* but another module within the same package). When that happens right click on the directory in the file tree and select **Mark Directory As -> Source Root**

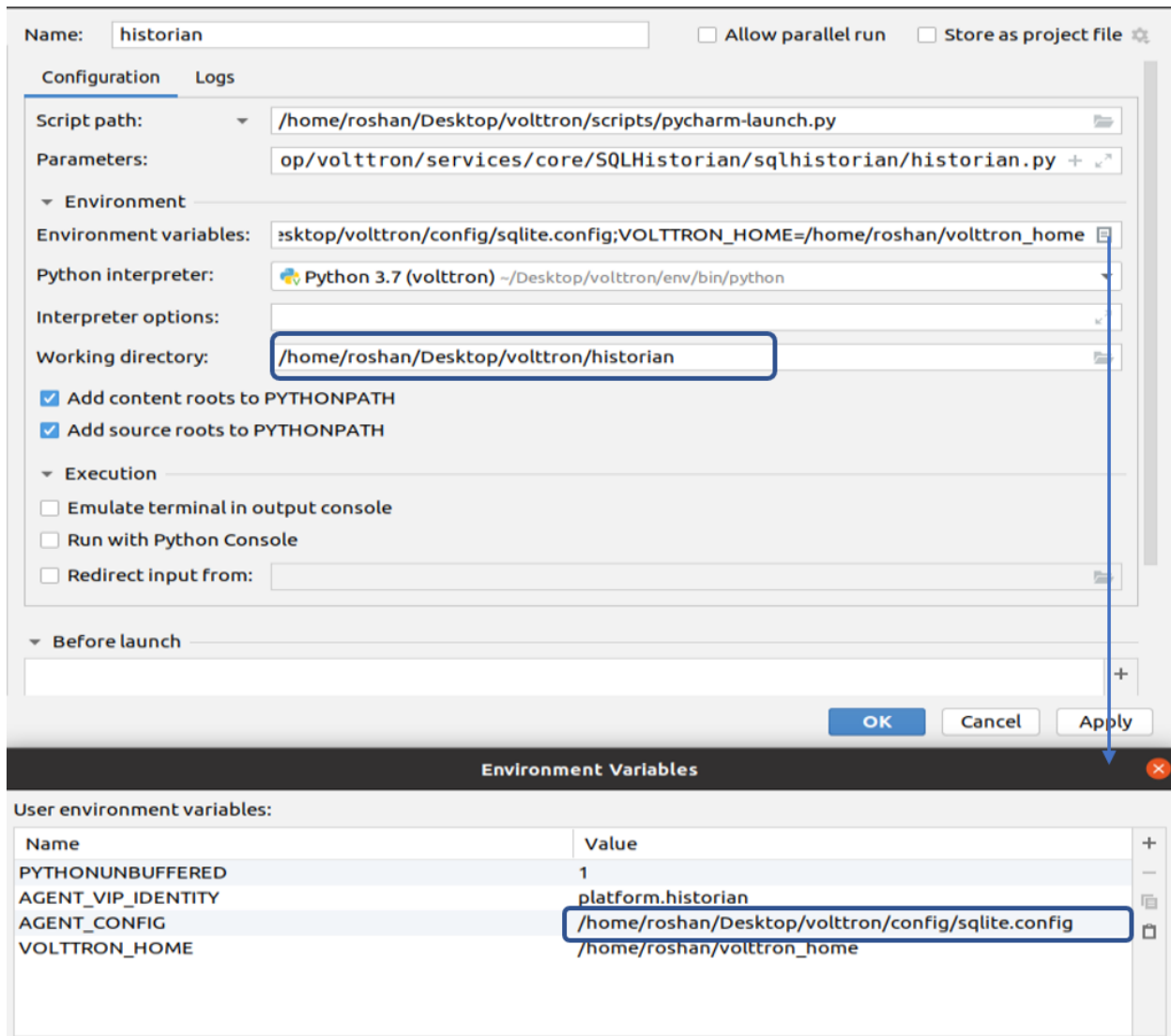
---



**Note:** There will be issues if two agents create a file with the same name in the same working directory. For instance: SQLHistorian agent and Forwarder agent both create a backup.sqlite directory on the same working directory. When that happens both the agents attempt to use the same backup db and eventually lock the db. To avoid this situation, create different working directories for each agent and add the absolute path for the config file. The best way to go

about this is to create a new folder and assign working directory to that folder as shown below.

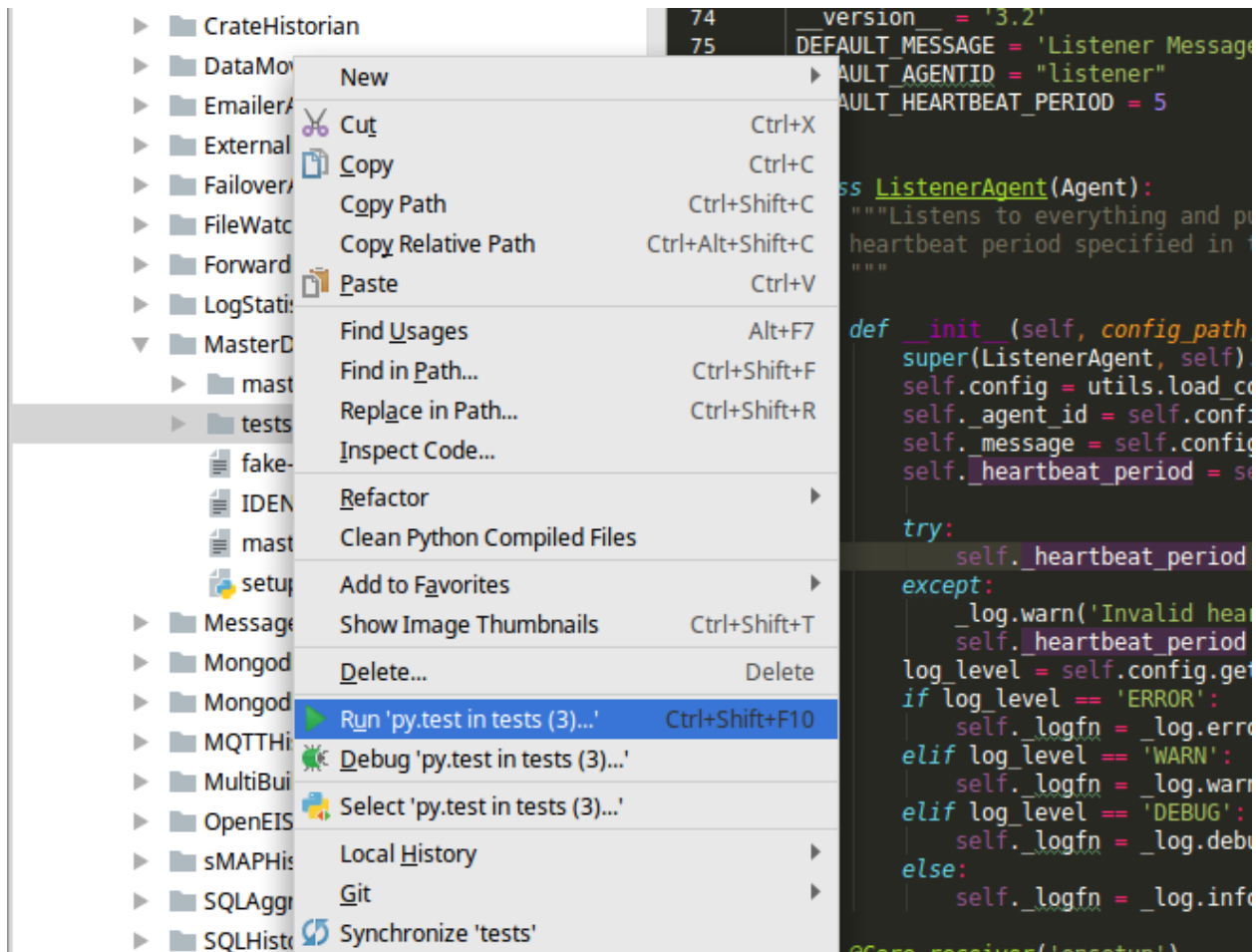




## Testing an Agent

Agent tests written in `pytest` can be run simply by right-clicking the tests directory and selecting *Run 'pytest in tests'*, so long as the root directory is set as the VOLTTRON source root.





## 2.20 Agent Development

The VOLTRON platform now has utilities to speed the creation and installation of new agents. To use these utilities the VOLTRON environment must be activated.

From the project directory, activate the VOLTRON environment with:

```
source env/bin/activate
```

### 2.20.1 Create Agent Code

Run the following command to start the Agent Creation Wizard:

```
vpkg init TestAgent tester
```

*TestAgent* is the directory that the agent code will be placed in. The directory must not exist when the command is run. *tester* is the name of the agent module created by wizard.

The Wizard will prompt for the following information:

```
Agent version number: [0.1]: 0.5
Agent author: []: VOLTTRON Team
Author's email address: []: volttron@pnnl.gov
Agent homepage: []: https://volttron.org/
Short description of the agent: []: Agent development tutorial.
```

Once the last question is answered the following will print to the console:

```
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent/tester
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent/setup.
↪py
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent/config
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent/
↪tester/agent.py
2018-08-02 12:20:56,604 () volttron.platform.packaging INFO: Creating TestAgent/
↪tester/__init__.py
```

The TestAgent directory is created with the new Agent inside.

### Agent Directory

At this point, the contents of the TestAgent directory should look like:

```
TestAgent/
├── setup.py
├── config
├── tester
│   ├── agent.py
│   └── __init__.py
```

### Agent Skeleton

The *agent.py* file in the *tester* directory of the newly created agent module will contain skeleton code (below). Descriptions of the features of this code as well as additional development help are found in the rest of this document.

```
"""
Agent documentation goes here.
"""

__docformat__ = 'reStructuredText'

import logging
import sys
from volttron.platform.agent import utils
from volttron.platform.vip.agent import Agent, Core, RPC

_log = logging.getLogger(__name__)
utils.setup_logging()
__version__ = "0.1"

def tester(config_path, **kwargs):
    """
```

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```

Parses the Agent configuration and returns an instance of
the agent created using that configuration.

:param config_path: Path to a configuration file.
:type config_path: str
:returns: Tester
:rtype: Tester
"""
try:
    config = utils.load_config(config_path)
except Exception:
    config = {}

if not config:
    _log.info("Using Agent defaults for starting configuration.")

setting1 = int(config.get('setting1', 1))
setting2 = config.get('setting2', "some/random/topic")

return Tester(setting1, setting2, **kwargs)

class Tester(Agent):
    """
    Document agent constructor here.
    """

    def __init__(self, setting1=1, setting2="some/random/topic", **kwargs):
        super(Tester, self).__init__(**kwargs)
        _log.debug("vip_identity: " + self.core.identity)

        self.setting1 = setting1
        self.setting2 = setting2

        self.default_config = {"setting1": setting1,
                               "setting2": setting2}

        # Set a default configuration to ensure that self.configure is called
        ↪ immediately to setup
        # the agent.
        self.vip.config.set_default("config", self.default_config)
        # Hook self.configure up to changes to the configuration file "config".
        self.vip.config.subscribe(self.configure, actions=["NEW", "UPDATE"], pattern=
        ↪ "config")

    def configure(self, config_name, action, contents):
        """
        Called after the Agent has connected to the message bus. If a configuration
        ↪ exists at startup
        this will be called before onstart.

        Is called every time the configuration in the store changes.
        """
        config = self.default_config.copy()
        config.update(contents)

        _log.debug("Configuring Agent")

```

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```

    try:
        setting1 = int(config["setting1"])
        setting2 = str(config["setting2"])
    except ValueError as e:
        _log.error("ERROR PROCESSING CONFIGURATION: {}".format(e))
        return

    self.setting1 = setting1
    self.setting2 = setting2

    self._create_subscriptions(self.setting2)

    def _create_subscriptions(self, topic):
        """
        Unsubscribe from all pub/sub topics and create a subscription to a topic in
        ↪ the configuration which triggers
        the _handle_publish callback
        """
        self.vip.pubsub.unsubscribe("pubsub", None, None)

        self.vip.pubsub.subscribe(peer='pubsub',
                                   prefix=topic,
                                   callback=self._handle_publish)

    def _handle_publish(self, peer, sender, bus, topic, headers, message):
        """
        ↪ Callback triggered by the subscription setup using the topic from the agent's
        ↪ config file
        """
        pass

    @Core.receiver("onstart")
    def onstart(self, sender, **kwargs):
        """
        This is method is called once the Agent has successfully connected to the
        ↪ platform.
        This is a good place to setup subscriptions if they are not dynamic or
        do any other startup activities that require a connection to the message bus.
        Called after any configurations methods that are called at startup.

        Usually not needed if using the configuration store.
        """
        # Example publish to pubsub
        # self.vip.pubsub.publish('pubsub', "some/random/topic", message="HI!")

        # Example RPC call
        # self.vip.rpc.call("some_agent", "some_method", arg1, arg2)
        pass

    @Core.receiver("onstop")
    def onstop(self, sender, **kwargs):
        """
        This method is called when the Agent is about to shutdown, but before it
        ↪ disconnects from
        the message bus.
        """

```

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```

    pass

    @RPC.export
    def rpc_method(self, arg1, arg2, kwarg1=None, kwarg2=None):
        """
        RPC method

        May be called from another agent via self.vip.rpc.call
        """
        return self.setting1 + arg1 - arg2

def main():
    """Main method called to start the agent."""
    utils.vip_main(tester,
                   version=__version__)

if __name__ == '__main__':
    # Entry point for script
    try:
        sys.exit(main())
    except KeyboardInterrupt:
        pass

```

The resulting code is well documented with comments and documentation strings. It gives examples of how to do common tasks in VOLTRON Agents. The main agent code is found in *tester/agent.py*.

## 2.20.2 Building an Agent

The following section includes guidance on several important components for building agents in VOLTRON.

### Parse Packaged Configuration and Create Agent Instance

The code to parse a configuration file packaged and installed with the agent is found in the *tester* function:

```

def tester(config_path, **kwargs):
    """
    Parses the Agent configuration and returns an instance of
    the agent created using that configuration.

    :param config_path: Path to a configuration file.
    :type config_path: str
    :returns: Tester
    :rtype: Tester
    """
    try:
        config = utils.load_config(config_path)
    except Exception:
        config = {}

    if not config:
        _log.info("Using Agent defaults for starting configuration.")

```

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```

setting1 = int(config.get('setting1', 1))
setting2 = config.get('setting2', "some/random/topic")

return Tester(setting1, setting2, **kwargs)

```

The configuration is parsed with the `utils.load_config` function and the results are stored in the `config` variable. An instance of the Agent is created from the parsed values and is returned.

## Initialization and Configuration Store Support

The *configuration store* is a powerful feature. The agent template provides a simple example of setting up default configuration store values and setting up a configuration handler.

```

class Tester(Agent):
    """
    Document agent constructor here.
    """

    def __init__(self, setting1=1, setting2="some/random/topic", **kwargs):
        super(Tester, self).__init__(**kwargs)
        _log.debug("vip_identity: " + self.core.identity)

        self.setting1 = setting1
        self.setting2 = setting2

        self.default_config = {"setting1": setting1,
                               "setting2": setting2}

        # Set a default configuration to ensure that self.configure is called
        ↪ immediately to setup
        # the agent.
        self.vip.config.set_default("config", self.default_config)
        # Hook self.configure up to changes to the configuration file "config".
        self.vip.config.subscribe(self.configure, actions=["NEW", "UPDATE"], pattern=
        ↪ "config")

    def configure(self, config_name, action, contents):
        """
        Called after the Agent has connected to the message bus. If a configuration
        ↪ exists at startup
        this will be called before onstart.

        Is called every time the configuration in the store changes.
        """
        config = self.default_config.copy()
        config.update(contents)

        _log.debug("Configuring Agent")

        try:
            setting1 = int(config["setting1"])
            setting2 = str(config["setting2"])
        except ValueError as e:
            _log.error("ERROR PROCESSING CONFIGURATION: {}".format(e))
        return

```

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```

self.setting1 = setting1
self.setting2 = setting2

self._create_subscriptions(self.setting2)

```

**Note:** Support for the configuration store is instantiated by subscribing to configuration changes with `self.vip.config.subscribe`.

```

self.vip.config.subscribe(self.configure_main, actions=["NEW", "UPDATE"], pattern=
↪ "config")

```

Values in the default config can be built into the agent or come from the packaged configuration file. The subscribe method tells our agent which function to call whenever there is a new or updated config file. For more information on using the configuration store see [Agent Configuration Store](#).

`_create_subscriptions` (covered in a later section) will use the value in `self.setting2` to create a new subscription.

## Agent Lifecycle Events

The agent lifecycle is controlled in the agents VIP *core*. The agent lifecycle manages *scheduling and periodic function calls*, the main agent loop, and trigger a number of signals for callbacks in the concrete agent code. These callbacks are listed and described in the skeleton code below:

**Note:** The lifecycle signals can trigger any method. To cause a method to be triggered by a lifecycle signal, use a decorator:

```

@Core.receiver("<lifecycle_method>")
def my_callback(self, sender, **kwargs):
    # do my lifecycle method callback
    pass

```

```

@Core.receiver("onsetup")
def onsetup(self, sender, **kwargs):
    """
    This method is called after the agent has successfully connected to the platform,
↪ but before the scheduled
    methods loop has started. This method not often used, but is most commonly used
↪ to define periodic
    functions or do some pre-configuration.
    """
    self.vip.core.periodic(60, send_request)

@Core.receiver("onstart")
def onstart(self, sender, **kwargs):
    """
    This method is called once the Agent has successfully connected to the platform.
    This is a good place to setup subscriptions if they are not dynamic or to
    do any other startup activities that require a connection to the message bus.
    Called after any configurations methods that are called at startup.
    """

```

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```

Usually not needed if using the configuration store.
"""
#Example publish to pubsub
self.vip.pubsub.publish('pubsub', "some/random/topic", message="HI!")

#Example RPC call
self.vip.rpc.call("some_agent", "some_method", arg1, arg2)

@Core.receiver("onstop")
def onstop(self, sender, **kwargs):
    """
    This method is called when the Agent is about to shutdown, but before it
    ↳ disconnects from
    the message bus. Common use-cases for this method are to stop periodic
    ↳ processing, closing connections and
    setting agent state prior to cleanup.
    """
    self.publishing = False
    self.cache.close()

@Core.receiver("onfinish")
def onfinish(self, sender, **kwargs):
    """
    This method is called after all scheduled threads have concluded. This method is
    ↳ rarely used, but could be
    used to send shut down signals to other agents, etc.
    """
    self.vip.pubsub.publish('pubsub', 'some/topic', message=f'agent {self.core.
    ↳ identity} shutdown')

```

## Periodics and Scheduling

Periodic and Scheduled callback functions are callbacks made to functions in agent code from the thread scheduling in the agent core.

### Scheduled Callbacks

Scheduled callback functions are often used similarly to cron jobs to perform tasks at specific times, or to schedule tasks ad-hoc as agent state is updated. There are 2 ways to schedule callbacks: using a decorator, or calling the core's scheduling function. Example usage follows.

```

# using the agent's core to schedule a task
self.core.schedule(periodic(5), self.sayhi)

def sayhi(self):
    print("Hello-World!")

```

```

# using the decorator to schedule a task
@Core.schedule(cron('0 1 * * *'))
def cron_function(self):
    print("this is a cron-scheduled function")

```



**Note:** Scheduled Callbacks can use CRON scheduling, a datetime object, a number of seconds (from current time), or a *periodic* which will make the schedule function as a periodic.

```
# inside some agent method
self.core.schedule(t, function)
self.core.schedule(periodic(t), periodic_function)
self.core.schedule(cron('0 1 * * *'), cron_function)
```

## Periodic Callbacks

Periodic call back functions are functions which are repeatedly called at a regular interval until the periodic is cancelled in the agent code or the agent stops running. Like scheduled callbacks, periodics can be specified using either decorators or using core function calls.

```
self.core.periodic(10, self.saybye)

def saybye(self):
    print('Good-bye Cruel World!')
```

```
@Core.periodic(60)
def poll_api(self):
    return requests.get("https://lmgtyfy.com").json()
```

**Note:** Periodic intervals are specified in seconds.

## Publishing Data to the Message Bus

The agent's VIP connection can be used to publish data to the message bus. The message published and topic to publish to are determined by the agent implementation. Classes of agents already *specified by VOLTRON* may have well-defined intended topic usage, see those agent specifications for further detail.

```
def publish_oscillating_update(self):
    """
    Publish an "oscillating_value" which cycles between values 1 and 0 to the message_
    bus using the topic
    "some/topic/oscillating_value"
    """
    self.publish_value = 1 if self.publish_value == 0 else 0
    self.vip.pubsub.publish('pubsub', 'some/topic/', message=f'"oscillating_value":
    {self.publish_value}')
```

## Setting up a Subscription

The Agent creates a subscription to a topic on the message bus using the value of `self.setting2` in the method `_create_subscription`. The messages for this subscription are handled with the `_handle_publish` method:

```
def _create_subscriptions(self, topic):
    """
    Unsubscribe from all pub/sub topics and create a subscription to a topic in the
    ↪ configuration which triggers
    the _handle_publish callback
    """
    # Unsubscribe from everything.
    self.vip.pubsub.unsubscribe("pubsub", None, None)

    self.vip.pubsub.subscribe(peer='pubsub',
                              prefix=topic,
                              callback=self._handle_publish)

def _handle_publish(self, peer, sender, bus, topic, headers, message):
    """
    Callback triggered by the subscription setup using the topic from the agent's
    ↪ config file
    """
    # By default no action is taken.
    pass
```

Alternatively, a decorator can be used to specify the function as a callback:

```
@PubSub.subscribe('pubsub', "topic_prefix")
def _handle_publish(self, peer, sender, bus, topic, headers, message):
    """
    Callback triggered by the subscription setup using the topic from the agent's
    ↪ config file
    """
    # By default no action is taken.
    pass
```

`self.vip.pubsub.unsubscribe` can be used to unsubscribe from a topic:

```
self.vip.pubsub.unsubscribe(peer='pubsub',
                             prefix=topic,
                             callback=self._handle_publish)
```

Giving `None` as values for the prefix and callback argument will unsubscribe from everything on that bus. This is handy for subscriptions that must be updated base on a configuration setting.

## Heartbeat

The heartbeat subsystem provides access to a periodic publish so that others can observe the agent's status. Other agents can subscribe to the `heartbeat` topic to see who is actively publishing to it. It is turned off by default.

Enabling the `heartbeat` publish:

```
self.vip.heartbeat.start_with_period(self._heartbeat_period)
```

Subscribing to the heartbeat topic:

```
self.vip.pubsub.subscribe(peer='pubsub',
                           prefix='heartbeat',
                           callback=handle_heartbeat)
```

## Health

The health subsystem adds extra status information to the an agent’s heartbeat. Setting the status will start the heartbeat if it wasn’t already. Health is used to represent the internal state of the agent at runtime. *GOOD* health indicates that all is fine with the agent and it is operating normally. *BAD* health indicates some kind of problem, such as if an agent is unable to reach a remote web API.

Example of setting health:

```
from volttron.platform.messaging.health import STATUS_BAD, STATUS_GOOD,

self.vip.health.set_status(STATUS_GOOD, "Configuration of agent successful")
```

## Remote Procedure Calls

An agent may receive commands from other agents via a Remote Procedure Call (RPC). This is done with the `@RPC.export` decorator:

```
@RPC.export
def rpc_method(self, arg1, arg2, kwarg1=None, kwarg2=None):
    """
    RPC method. May be called from another agent via self.vip.rpc.call
    """
    return self.setting1 + arg1 - arg2
```

To send an RPC call to another agent running on the platform, the agent must invoke the `rpc.call` method of its VIP connection.

```
# in agent code
def send_remote_procedure_call(self):
    peer = "<agent identity>"
    peer_method = "<method in peer agent API>"
    args = ["list", "of", "peer", "method", "arguments", "..."]
    self.vip.rpc.call(peer, peer_method, *args)
```

## Agent Resiliency

The VOLTTRON team has come up with a number of methods to help users develop more robust agents.

1. Use `gevent.sleep(<seconds>)` in callbacks which perform long running functions. Long running functions can cause other agent functions including those in the base agent to be delayed. Calling `gevent.sleep` transfers control from the current executing greenlet to the next scheduled greenlet for the duration of the sleep, allowing other components of the agent code to run.
2. Call `.get(<timeout>)` on VIP subsystem calls (i.e. `self.vip.rpc.call(...).get()`) to ensure that the call returns a value or throws an Exception in a timely manner. A number of seconds can be provided to specify a timeout duration.
3. Many of the *Operations Agents* can be used to monitor agent health, status, publishing frequency and more. Read up on the “ops agents” for more information.

---

**Note:** If an agent crashes, becomes unreachable, etc., it is up to the user to restart or reconnect the agent.

---

4. The main agent thread should monitor any spawned threads or processes to ensure they're cleaned up and/or exit safely.

## Building a resilient API

Many agents export RPC calls or expose an API (application programming interface) which can be used by other agents on the platform. The agent should include validation against input data for its API to ensure the agent is able to continue to operate even if asked to handle faulty or malicious requests.

## Type-hints

Type-hints can be used in function definitions to help the user determine what the agent expects as input.

**Warning:** Type-hints do not validate the type of data input to a function call, they are merely suggestions about what the function is expecting.

- To specify the type expected as input:

```
# When calling this RPC method, the user should supply a string as input
@RPC.export
def type_hint_rpc(input_string: str):
```

- To specify the type of function output:

```
# This demonstrates a function that expects a string as input and that will return an
↳ integer value
@RPC.export
def type_hint_rpc(input_string: str) -> int:
```

- Specifying multiple types:

```
# Here our function expects either a string or dictionary
@RPC.export
def type_hint_rpc(input_json: Union[str, dict]) -> str:
```

- To specify an optional argument with None as the default value:

```
# 'Optional' is used to specify either a string should be passed or the default value
↳ 'None' will be used
@RPC.export
def type_hint_rpc(optional_input: Optional[str] = None) -> str:
```

- These techniques can be combined:

```
# 'Optional' can be used in combination with 'Union' for optional arguments which
↳ expect one of multiple types and
# default to None
@RPC.export
def type_hint_rpc(optional_input: Optional[Union[str, dict]] = None) -> str:
```

## API Validation

Each function within an agent should validate its input parameters, especially with structured data.

- Make use of `isinstance` to do type checking:

```
@RPC.export
def type_checking_rpc(input_str: str) -> dict:
    if not isinstance(input_str, str):
        # Include a descriptive error message to help the user determine
        ↪ why input validation failed
        # You can make use of 'f-strings' to help the user with debugging
        raise ValueError(
            f'The expected input type for function "type_checking_rpc" is
            ↪ str, received {type(input_str)}')
```

- Add logic to validate the range of values supplied as input with a valid type:

```
@RPC.export
def value_checking_rpc(input_json: Union[str, dict]) -> dict:
    if not isinstance(input_json, str) or not isinstance(input_json,
    ↪ dict):
        # You can make use of 'f-strings' to help the user determine why
        ↪ input validation failed
        raise ValueError(
            f'The expected input type for function "type_checking_rpc" is
            ↪ str or dict, received {type(input_str)}')
    else:
        # since we expected the input to be valid JSON, be sure that it
        ↪ can be correctly parsed
        if isinstance(input_json, str):
            input_json = json.loads(input_json)
            # for this example, we expect our JSON to include two fields:
            ↪ test1 and test2
            # Use 'dict.get(<key>)' rather than 'dict[<key>]' to return None
            ↪ and avoid causing a KeyError if the key
            # is not present. Optionally, a second argument can be added to
            ↪ specify a default value to use in
            # place of None: 'dict.get(<key>, <default value>)'
            test_1 = input_json.get("test1")
            test_2 = input_json.get("test2")
            # test 1 must be any string value
            if not isinstance(test_1, str):
                raise ValueError('Input JSON should contain key "test1" with
                ↪ value of type str')
            # test 2 must be an integer value with value between 0 and 100
            ↪ inclusive
            if not isinstance(test_2, int) and 0 <= test_2 <= 100:
                _log.warning(f'Field "test2" in input JSON was out of range
                ↪ (0 - 100): {test_2}, defaulting to 50')
                test_2 = 50
```

---

**Note:** It is possible to restrict access to RPC functions using an *agent's authentication* capabilities.

---

### 2.20.3 Packaging Configuration

The wizard will automatically create a `setup.py` file. This file sets up the name, version, required packages, method to execute, etc. for the agent based on your answers to the wizard. The packaging process will also use this information to name the resulting file.

```
from setuptools import setup, find_packages

MAIN_MODULE = 'agent'

# Find the agent package that contains the main module
packages = find_packages('.')
agent_package = 'tester'

# Find the version number from the main module
agent_module = agent_package + '.' + MAIN_MODULE
__temp = __import__(agent_module, globals(), locals(), ['__version__'], -1)
__version__ = __temp.__version__

# Setup
setup(
    name=agent_package + 'agent',
    version=__version__,
    author_email="voltttron@pnnl.gov",
    url="https://voltttron.org/",
    description="Agent development tutorial.",
    author="VOLTTRON Team",
    install_requires=['voltttron'],
    packages=packages,
    entry_points={
        'setuptools.installation': [
            'eggsecutable = ' + agent_module + ':main',
        ]
    }
)
```

### 2.20.4 Launch Configuration

In TestAgent, the wizard will automatically create a JSON file called “config”. It contains configuration information for the agent. This file contains examples of every data type supported by the configuration system:

```
{
    # VOLTTRON config files are JSON with support for python style comments.
    "setting1": 2, # Integers
    "setting2": "some/random/topic2", #Strings
    "setting3": true, # Booleans: remember that in JSON true and false are not_
    ↪capitalized.
    "setting4": false,
    "setting5": 5.1, # Floating point numbers.
    "setting6": [1,2,3,4], #Lists
    "setting7": {"setting7a": "a", "setting7b": "b"} #Objects
}
```

## 2.20.5 Packaging and Installation

To install the agent the platform must be running. Start the platform with the command:

```
./start-volttron
```

**Note:** If you are not in an activated environment, this script will start the platform running in the background in the correct environment. However the environment will not be activated for you; you must activate it yourself.

Now we must install it into the platform. Use the following command to install it and add a tag for easily referring to the agent. From the project directory, run the following command:

```
python scripts/install-agent.py -s TestAgent/ -c TestAgent/config -t testagent
```

To verify it has been installed, use the following command:

```
vctl list
```

This will result in output similar to the following:

	AGENT	IDENTITY	TAG	Status	Health	PRI
df	testeragent-0.5	testeragent-0.5_1	testagent			

- The first string is a unique portion of the full UUID for the agent
- AGENT is the “name” of the agent based on the contents of its class name and the version in its setup.py.
- IDENTITY is the agent’s identity in the platform. This is automatically assigned based on class name and instance number. This agent’s ID is `_1` because it is the first instance.
- TAG is the name we assigned in the command above
- Status indicates the running status of an agent - running agents are *running*, agents which are not running will have no listed status
- Health is an indication of the internal state of the agent. ‘Healthy’ agents will have GOOD health. If an agent enters an error state, it will continue to run, but its health will be BAD.
- PRI is the priority for agents which have been “enabled” using the `vctl enable` command.

When using lifecycle commands on agents, they can be referred to by the UUID (default) or AGENT (name) or TAG.

## 2.20.6 Running and Testing the Agent

Now that the first pass of the agent code is complete, we can see if the agent works. It is highly-suggested to build a set of automated tests for the agent code prior to writing the agent, and running those tests after the agent is code-complete. Another quick way to determine if the agent is going the right direction is to run the agent on the platform using the VOLTTTRON command line interface.

## From the Command Line

To test the agent, we will start the platform (if not already running), launch the agent, and check the log file. With the VOLTTRON environment activated, start the platform by running (if needed):

```
./start-volttron
```

You can launch the agent in three ways, all of which you can find by using the *vctl list* command:

- By using the <uuid>:

```
vctl start <uuid>
```

- By name:

```
vctl start --name testeragent-0.1
```

- By tag:

```
vctl start --tag testagent
```

Check that it is *running*:

```
vctl status
```

- Start the ListenerAgent as in the *platform installation guide*.
- Check the log file for messages indicating the TestAgent is receiving the ListenerAgents messages:

```
2021-01-12 16:46:58,291 (listeneragent-3.3 12136) __main__ INFO: Peer: pubsub,
↪Sender: testeragent-0.1_1:, Bus: , Topic: some/random/topic, Headers: {'min_
↪compatible_version': '5.0', 'max_compatible_version': ''}, Message: 'HI!'
```

## Automated Test Cases and Documentation

Before contributing a new agent to the VOLTTRON source code repository, please consider adding two other essential elements.

1. Integration and unit test cases
2. README file that includes details of pre-requisite software, agent setup details (such as setting up databases, permissions, etc.) and sample configuration

VOLTTRON uses *pytest* as a framework for executing tests. All unit tests should be based on the *pytest* framework. For instructions on writing unit and integration tests with *pytest*, refer to the *Writing Agent Tests* documentation.

*pytest* is not installed with the distribution by default. To install *py.test* and its dependencies execute the following:

```
python bootstrap.py --testing
```

---

**Note:** There are other options for different agent requirements. To see all of the options use:

```
python bootstrap.py --help
```

in the Extra Package Options section.

---

To run a single test module, use the command



```
pytest <testmodule.py>
```

To run all of the tests in the voltron repository execute the following in the root directory using an activated command prompt:

```
./ci-integration/run-tests.sh
```

## 2.20.7 Scripts

In order to make repetitive tasks less repetitive the VOLTRON team has create several scripts in order to help. These tasks are available in the *scripts* directory.

**Note:** In addition to the *scripts* directory, the VOLTRON team has added the config directory to the .gitignore file. By convention this is where we store customized scripts and configuration that will not be made public. Please feel free to use this convention in your own processes.

The *scripts/core* directory is laid out in such a way that we can build scripts on top of a base core. For example the scripts in sub-folders such as the *historian-scripts* and *demo-comms* use the scripts that are present in the core directory.

The most widely used script is *scripts/install-agent.py*. The *install\_agent.py* script will remove an agent if the tag is already present, create a new agent package, and install the agent to *VOLTRON\_HOME*. This script has three required arguments and has the following signature:

**Note:** Agent to Package must have a setup.py in the root of the directory. Additionally, the user must be in an activated Python Virtual Environment for VOLTRON

```
cd $VOLTRON_ROOT
source env/bin/activate
```

```
python scripts/install_agent.py -s <agent path> -c <agent config file> -i <agent VIP_
↪identity> --tag <Tag>
```

**Note:** The `--help` optional argument can be used with *scripts/install-agent.py* to view all available options for the script

The *install\_agent.py* script will respect the *VOLTRON\_HOME* specified on the command line or set in the global environment. An example of setting *VOLTRON\_HOME* to */tmp/vlhome* is as follows.

```
VOLTRON_HOME=/tmp/vlhome python scripts/install-agent.py -s <Agent to Package> -c
↪<Config file> --tag <Tag>
```

## Agent Configuration Store Interface

The Agent Configuration Store Subsystem provides an interface for facilitating dynamic configuration via the platform configuration store. It is intended to work alongside the original configuration file to create a backwards compatible system for configuring agents with the bundled configuration file acting as default settings for the agent.

If an Agent Author does not want to take advantage of the platform configuration store they need to make no changes. To completely disable the Agent Configuration Store Subsystem an Agent may pass `enable_store=False` to the `Agent.__init__` method.

The Agent Configuration Store Subsystem caches configurations as the platform sends updates to the agent. Updates from the platform will usually trigger callbacks on the agent.

Agent access to the Configuration Store is managed through the `self.vip.config` object in the Agent class.

## The “config” Configuration

The configuration name `config` is considered the canonical name of an Agents main configuration. As such the Agent will always run callbacks for that configuration first at startup and when a change to another configuration triggers any callbacks for `config`.

## Configuration Callbacks

Agents may setup callbacks for different configuration events. The callback method must have the following signature:

```
my_callback(self, config_name, action, contents)
```

---

**Note:** The example above is for a class member method, however the method does not need to be a member of the agent class.

---

- **config\_name** - The method to call when a configuration event occurs.
- **action** - The specific configuration event type that triggered the callback. Possible values are “NEW”, “UPDATE”, “DELETE”. See [Configuration Events](#)
- **contents** - The actual contents of the configuration. Will be a string, list, or dictionary for the actions “NEW” and “UPDATE”. None if the action is “DELETE”.

---

**Note:** All callbacks which are connected to the “NEW” event for a configuration will called during agent startup with the initial state of the configuration.

---

## Configuration Events

- **NEW** - This event happens for every existing configuration at Agent startup and whenever a new configuration is added to the Configuration Store.
- **UPDATE** - This event happens every time a configuration is changed.
- **DELETE** - The event happens every time a configuration is removed from the store.

## Setting Up a Callback

A callback is setup with the `self.vip.config.subscribe` method.

**Note:** Subscriptions may be setup at any point in the life cycle of an Agent. Ideally they are setup in `__init__`.

```
subscribe(callback, actions=["NEW", "UPDATE", "DELETE"], pattern="*")
```

- **callback** - The method to call when a configuration event occurs.
- **actions** - The specific configuration event that will trigger the callback. May be a string with the name of a single action or a list of actions.
- **pattern** - The pattern used to match configuration names to trigger the callback.

## Configuration Name Pattern Matching

Configuration name matching uses Unix file name matching semantics. Specifically the python module `fnmatch` is used.

Name matching is not case sensitive regardless of the platform VOLTTRON is running on.

For example, the pattern `devices/*` will trigger the supplied callback for any configuration name that starts with `devices/`.

The default pattern matches all configurations.

## Getting a Configuration

Once RPC methods are available to an agent (once onstart methods have been called or from any configuration callback) the contents of any configuration may be acquired with the `self.vip.config.get` method.

```
get(config_name="config")
```

If the Configuration Subsystem has not been initialized with the starting values of the agent configuration that will happen in order to satisfy the request.

If initialization occurs to satisfy the request callbacks will *not* be called before returning the results.

Typically an Agent will only obtain the contents of a configuration via a callback. This method is included for agents that want to save state in the store and only need to retrieve the contents of a configuration at startup and ignore any changes to the configuration going forward.

## Setting a Configuration

Once RPC methods are available to an agent (once onstart methods have been called) the contents of any configuration may be set with the `self.vip.config.set` method.

```
set(config_name, contents, trigger_callback=False, send_update=False)
```

The contents of the configuration may be a string, list, or dictionary.

This method is intended for agents that wish to maintain a copy of their state in the store for retrieval at startup with the `self.vip.config.get` method.

**Warning:** This method may **not** be called from a configuration callback. The Configuration Subsystem will detect this and raise a `RuntimeError`, even if `trigger_callback` or `send_update` is `False`.

The platform has a locking mechanism to prevent concurrent configuration updates to the Agent. Calling `self.vip.config.set` would cause the Agent and the Platform configuration store for that Agent to deadlock until a timeout occurs.

Optionally an agent may trigger any callbacks by setting `trigger_callback` to `True`. If `trigger_callback` is set to `False` the platform will still send the updated configuration back to the agent. This ensures that a subsequent call to `self.vip.config.get` will still return the correct value. This way the agent's configuration subsystem is kept in sync with the platform's copy of the agent's configuration store at all times.

Optionally the agent may prevent the platform from sending the updated file to the agent by setting `send_update` to `False`. This setting is available strictly for performance tuning.

**Warning:** This setting will allow the agent's view of the configuration to fall out of sync with the platform. Subsequent calls to `self.vip.config.get` will return an old version of the file if it exists in the agent's view of the configuration store.

This will also affect any configurations that reference the configuration changed with this setting.

Care should be taken to ensure that the configuration is only retrieved at agent startup when using this option.

## Setting a Default Configuration

In order to more easily allow agents to use both the Configuration Store while still supporting configuration via the tradition method of a bundled configuration file the `self.vip.config.set_default` method was created.

```
set_default(config_name, contents)
```

**Warning:** This method may **not** be called once the Agent Configuration Store Subsystem has been initialized. This method should only be called from `__init__` or an `onsetup` method.

The `set_default` method adds a temporary configuration to the Agents Configuration Subsystem. Nothing is sent to the platform. If a configuration with the same name exists in the platform store it will be presented to a callback method in place of the default configuration.

The normal way to use this is to set the contents of the packaged Agent configuration as the default contents for the configuration named `config`. This way the same callback used to process `config` configuration in the Agent will be called when the Configuration Subsystem can be used to process the configuration file packaged with the Agent.

---

**Note:** No attempt is made to merge a default configuration with a configuration from the store.

---

If a configuration is deleted from the store and a default configuration exists with the same name the Agent Configuration Subsystem will call the `UPDATE` callback for that configuration with the contents of the default configuration.

## Other Methods

In a well thought out configuration scheme these methods should not be needed but are included for completeness.

## List Configurations

A current list of all configurations for the Agent may be called with the *self.vip.config.list* method.

## Unsubscribe

All subscriptions can be removed with a call to the *self.vip.config.unsubscribe\_all* method.

## Delete

A configuration can be deleted with a call to the *self.vip.config.delete* method.

```
delete(config_name, trigger_callback=False)
```

**Note:** This method may **not** be called from a callback for the same reason as the *self.vip.config.set* method.

## Delete Default

A default configuration can be deleted with a call to the *self.vip.config.delete\_default* method.

```
delete_default(config_name)
```

**Warning:** This method may **not** be called once the Agent Configuration Store Subsystem has been initialized. This method should only be called from `__init__` or an *onsetup* method.

## Example Agent

The following example shows how to use `set_default` with a basic configuration and how to setup callbacks.

```
def my_agent(config_path, **kwargs):
    config = utils.load_config(config_path) #Now returns {} if config_path does not_
    ↪exist.

    setting1 = config.get("setting1", 42)
    setting2 = config.get("setting2", 2.5)

    return MyAgent(setting1, setting2, **kwargs)

class MyAgent(Agent):
    def __init__(self, setting1=0, setting2=0.0, **kwargs):
        super(MyAgent, self).__init__(**kwargs)
```

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```

self.default_config = {"setting1": setting1,
                       "setting2": setting2}

self.vip.config.set_default("config", self.default_config)
#Because we have a default config we don't have to worry about "DELETE"
self.vip.config.subscribe(self.configure_main, actions=["NEW", "UPDATE"],
↪pattern="config")
self.vip.config.subscribe(self.configure_other, actions=["NEW", "UPDATE"],
↪pattern="other_config/*")
self.vip.config.subscribe(self.configure_delete, actions="DELETE", pattern=
↪"other_config/*")

def configure_main(self, config_name, action, contents):
#Ensure that we use default values from anything missing in the configuration.
config = self.default_config.copy()
config.update(contents)

_log.debug("Configuring MyAgent")

#Sanity check the types.
try:
    setting1 = int(config["setting1"])
    setting2 = float(config["setting2"])
except ValueError as e:
    _log.error("ERROR PROCESSING CONFIGURATION: {}".format(e))
    #TODO: set a health status for the agent
    return

_log.debug("Using setting1 {}, setting2 {}".format(setting1, setting2))
#Do something with setting1 and setting2.

def configure_other(self, config_name, action, contents):
_log.debug("Configuring From {}".format(config_name))
#Do something with contents of configuration.

def configure_delete(self, config_name, action, contents):
_log.debug("Removing {}".format(config_name))
#Do something in response to the removed configuration.

```

## Writing Agent Tests

The VOLTTRON team strongly encourages developing agents with a set of unit and integration tests. Test-driven development can save developers significant time and effort by clearly defining behavioral expectations for agent code. We recommend developing agent tests using Pytest. Agent code contributed to VOLTTRON is expected to include a set of tests using Pytest in the agent module directory. Following are instructions for setting up Pytest, structuring your tests, how to write unit and integration tests (including some helpful tools using Pytest and Mock) and how to run your tests.

## Installation

To get started with Pytest, install it in an activated environment:

```
pip install pytest
```

Or when running VOLTRON’s bootstrap process, specify the `--testing` optional argument.

```
python bootstrap.py --testing
```

[Pytest on PyPI](#)

## Module Structure

We suggest the following structure for your agent module:



The test suite should be in a *tests* directory in the root agent directory, and should contain one or more test code files (with the *test\_<name of test>* convention). *confest.py* can be used to give all agent tests access to some portion of the VOLTRON code. In many cases, agents use *confest.py* to import VOLTRON testing fixtures for integration tests.

## Naming Conventions

Pytest tests are discovered and run using some conventions:

- Tests will be found recursively in either the directory specified when running Pytest, or the current working directory if no argument was supplied
- Pytest will search in those directories for files called *test\_<name of test>.py* or *<name of test>\_test.py*
- **In those files, Pytest will test:**
  - functions and methods prefixed by “test” outside of any class
  - functions and methods prefixed by “test” inside of any class prefixed by “test”



```
# test1.py

def helper_method():
    return 1

def test_success():
    assert helper_method()

# test2.py

def test_success():
    assert True

def test_fail():
    assert False

# file.py

def test_success():
    assert True

def test_fail():
    assert False
```

In the above example, Pytest will run the tests *test\_success* from the file *test1.py* and *test\_success* and *test\_fail* from *test2.py*. No tests will be run from *file.txt*, even though it contains test code, nor will it try to run *helper\_method* from *test1.py* as a test.

## Writing Unit Tests

These tests should test the various methods of the code base, checking for success and fail conditions. These tests should capture how the components of the system should function; and describe all the possible output conditions given the possible range of inputs including how they should fail if given improper input.

[Pytest guide to Unit Testing](#)

## Mocking Dependencies

VOLTTRON agents include code for many platform features; these features can be mocked to allow unit tests to test only the features of the agent without having to account for the behaviors of the core platform. While there are many tools that can mock dependencies of an agent, we recommend Volttron's AgentMock or Python's Mock testing library.

## AgentMock

AgentMock was specifically created to run unit tests on agents. AgentMock takes an Agent class and mocks the attributes and methods of that Agent's dependencies. AgentMock also allows you to customize the behavior of dependencies within each individual test. Below is an example:

```
# Import the Pytest, Mock, base Agent, and Agent mock utility from VOLTTRON's
↪ repository
import pytest
import mock
from volttron.platform.vip.agent import Agent
```

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```

from volttrontesting.utils.utils import AgentMock
# Import your agent code
from UserAgent import UserAgentClass

UserAgentClass.__bases__ = (AgentMock.imitate(Agent, Agent()),)
agent = UserAgentClass()

def test_success_case():
    result = agent.do_function("valid input")
    assert isinstance(result, dict)
    for key in ['test1', 'test2']:
        assert key in result
    assert result.get("test1") == 10
    assert isinstance(result.get("test2"), str)
    # ...

def test_success_case_custom_mocks():
    agent.some_dependency.some_method.return_value = "foobar"
    agent.some_attribute = "custom, dummy value"
    result = agent.do_function_that_relies_on_custom_mocks("valid input")
    # ...

def test_failure_case():
    # pytest.raises can be useful for testing exceptions, more information about_
    ↪usage below
    with pytest.raises(ValueError, match=r'Invalid input string for do_function'):
        result = agent.do_function("invalid input")

```

## Mock

Similar to AgentMock, Python's Mock testing library allows a user to replace the behavior of dependencies with a user-specified behavior. This is useful for replacing VOLTRON platform behavior, remote API behavior, modules, etc. where using them in unit or integration tests is impractical or impossible. Below is an example that uses the patch decorator to mock an Agent's web request.

Mock documentation

```

class UserAgent():

    def __init__():
        # Code here

    def get_remote_data():
        response = self._get_data_from_remote()
        return "Remote response: {}".format(response)

    # it can be useful to create private functions for use with mock for things like_
    ↪making web requests
    def _get_data_from_remote():
        url = "test.com/test1"
        headers = {}
        return requests.get(url, headers)

# ~~~~~

```

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```

import pytest
import mock

def get_mock_response():
    return "test response"

# here we're mocking the UserAgent's _get_data_from_remote method and replacing it_
↳with our get_mock_response method
# to feed our test some fake remote data
@mock.patch.object(UserAgent, '_get_data_from_remote', get_mock_response)
def test_get_remote_data():
    assert UserAgent.get_remote_Data() == "Remote response: test response"

```

## Pytest Tools

Pytest includes many helpful tools for developing your tests. We'll highlight a few that have been useful for VOLTTRON core tests, but checkout [the Pytest documentation](#) for additional information on each tool as well as tools not covered in this guide.

## Pytest Fixtures

Pytest fixtures can be used to create reusable code for tests that can be accessed by every test in a module based on scope. There are several kinds of scopes, but commonly used are “module” (the fixture is run once per module for all the tests of that module) or “function” (the fixture is run once per test). For fixtures to be used by tests, they should be passed as parameters.

[Pytest Fixture documentation](#)

Here is an example of a fixture, along with using it in a test:

```

# Fixtures with scope function will be run once per test if the test accepts the_
↳fixture as a parameter
@pytest.fixture(scope="function")
def cleanup_database():
    # This fixture cleans up a sqlite database in between each test run
    sqlite_conn = sqlite.connect("test.sqlite")
    cursor = sqlite_conn.cursor()
    cursor.execute("DROP TABLE 'TEST'")
    cursor.commit()

    cursor.execute("CREATE TABLE TEST (ID INTEGER, FirstName TEXT, LastName TEXT, _
↳Occupation Text)")
    cursor.commit()
    sqlite_conn.close()

# when we pass the cleanup function, we expect that the table will be dropped and_
↳rebuilt before the test runs
def test_store_data(cleanup_database):
    sqlite_conn = sqlite.connect("test.sqlite")
    cursor = sqlite_conn.cursor()
    # after this insert, we'd expect to only have 1 value in the table
    cursor.execute("INSERT INTO TEST VALUES(1, 'Test', 'User', 'Developer')")
    cursor.commit()

```

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```
# validate the row count
cursor.execute("SELECT COUNT(*) FROM TEST")
count = cursor.fetchone()
assert count == 1
```

## Pytest.mark

Pytest marks are used to set metadata for test functions. Defining your own custom marks can allow you to run subsections of your tests. Parametrize can be used to pass a series of parameters to a test, so that it can be run many times to cover the space of potential inputs. Marks also exist to specify expected behavior for tests.

[Mark documentation](#)

## Custom Marks

To add a custom mark, add the name of the mark followed by a colon then a description string to the ‘markers’ section of Pytest.ini (an example of this exists in the core VOLTTRON repository). Then add the appropriate decorator:

```
@pytest.mark.UserAgent
def test_success_case():
    # TODO unit test here
    pass
```

The VOLTTRON team also has a *dev* mark for running individual (or a few) one-off tests.

```
@pytest.mark.dev
@pytest.mark.UserAgent
def test_success_case():
    # TODO unit test here
    pass
```

## Parametrize

Parametrize will allow tests to be run with a variety of parameters. Add the parametrize decorator, and for parameters include a list of parameter names matching the test parameter names as a comma-delimited string followed by a list of tuples containing parameters for each test.

[Parametrize docs](#)

```
@pytest.mark.parametrize("test_input1, test_input2, expected", [(1, 2, 3), (-1, 0, "
→")])
def test_user_agent(param1, param2, param3):
    # TODO unit test here
    pass
```

## Skip, skipif, and xfail

The *skip* mark can be used to skip a test for any reason every time the test suite is run:

```
# This test will be skipped!
@pytest.mark.skip
def test_user_agent():
    # TODO unit test here
    pass
```

The *skipif* mark can be used to skip a test based on some condition:

```
# This test will be skipped if RabbitMQ hasn't been set up yet!
@pytest.mark.skipif(not isRabbitMQInstalled)
def test_user_agent():
    # TODO unit test here
    pass
```

The *xfail* mark can be used to run a test, but to show that the test is currently expected to fail

```
# This test will fail, but will not cause the module tests to be considered failing!
@pytest.mark.xfail
def test_user_agent():
    # TODO unit test here
    assert False
```

[Skip, skipif, and xfail docs](#)

## Writing Integration Tests

Integration tests are useful for testing the faults that occur between integrated units. In the context of VOLTTRON agents, integration tests should test the interactions between the agent, the platform, and other agents installed on the platform that would interface with the agent. It is typical for integration tests to test configuration, behavior and content of RPC calls and agent Pub/Sub, the agent subsystems, etc.

[Pytest best practices for Integration Testing](#)

## Volttrontesting Directory

The *Volttrontesting* directory includes several helpful fixtures for your tests. Including the following line at the top of your tests, or in *conftest.py*, will allow you to utilize the platform wrapper fixtures, and more.

```
from volttrontesting.fixtures.volttron_platform_fixtures import *
```

Here is an example success case integration test:

```
import pytest
import mock
from volttrontesting.fixtures.volttron_platform_fixtures import *

# If the test requires user specified values, setting environment variables or having
↳ settings files is recommended
API_KEY = os.environ.get('API_KEY')
```

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```

# request object is a pytest object for managing the context of the test
@pytest.fixture(scope="module")
def Weather(request, volttron_instance):
    config = {
        "API_KEY": API_KEY
    }
    # using the volttron_instance fixture (passed in by volttron testing fixtures), we
    ↪ can install an agent
    # on the platform to test against
    agent = volttron_instance.install_agent(
        vip_identity=identity,
        agent_dir=source,
        start=False,
        config_file=config)

    volttron_instance.start_agent(agent)
    gevent.sleep(3)

    def stop_agent():
        print("stopping weather service")
        if volttron_instance.is_running():
            volttron_instance.stop_agent(agent)
    # here we used the passed request object to add something to happen when the test
    ↪ is finished
    request.addfinalizer(stop_agent)
    return agent, identity

# Here we create a really simple agent which has only the core functionality, which
    ↪ we can use for Pub/Sub
# or JSON/RPC
@pytest.fixture(scope="module")
def query_agent(request, volttron_instance):
    # Create the simple agent
    agent = volttron_instance.build_agent()

    def stop_agent():
        print("In teardown method of query_agent")
        agent.core.stop()

    request.addfinalizer(stop_agent)
    return agent

# pass the 2 fixtures to our test, then we can run the test
def test_weather_success(Weather, query_agent):
    query_data = query_agent.vip.rpc.call(identity, 'get_current_weather', locations).
    ↪ get(timeout=30)
    assert query_data.get("weather_results") = "Its sunny today!"

```

For more integration test examples, it is recommended to take a look at some of the VOLTTRON core agents, such as historian agents and weather service agents.

## Using Docker for Limited-Integration Testing

If you want to run limited-integration tests which do not require the setup of a volttron system, you can use Docker containers to mimic dependencies of an agent. The `volttrontesting/fixtures/docker_wrapper.py` module provides a convenient function to create docker containers for use in limited-integration tests. For example, suppose that you had an agent with a dependency on a MySQL database. If you want to test the connection between the Agent and the MySQL dependency, you can create a Docker container to act as a real MySQL database. Below is an example:

```
from volttrontesting.fixtures.docker_wrapper import create_container
from UserAgent import UserAgentClass

def test_docker_wrapper_example():
    ports_config = {'3306/tcp': 3306}
    with create_container("mysql:5.7", ports=ports_config) as container:
        init_database(container)
        agent = UserAgent(ports_config)

        results = agent.some_method_that_talks_to_container()
```

## Running your Tests and Debugging

Pytest can be run from the command line to run a test module.

```
pytest <path to module to be tested>
```

If using marks, you can add `-m <mark>` to specify your testing subset, and `-s` can be used to suppress standard output. For more information about optional arguments you can type `pytest --help` into your command line interface to see the full list of options.

Testing output should look something like this:

```
(volttron) <user>@<host>:~/volttron$ pytest services/core/SQLHistorian/
===== test session starts _
<=>=====
platform linux -- Python 3.6.9, pytest-5.4.1, py-1.8.1, pluggy-0.13.1 -- /home/<user>/
<=>volttron/env/bin/python
cachedir: .pytest_cache
rootdir: /home/<user>/volttron, inifile: pytest.ini
plugins: timeout-1.3.4
timeout: 240.0s
timeout method: signal
timeout func_only: False
collected 2 items

services/core/SQLHistorian/tests/test_sqlitehistorian.py::test_sqlite_
<=>timeout[volttron_3-volttron_instance0] ERROR [ 50%]
services/core/SQLHistorian/tests/test_sqlitehistorian.py::test_sqlite_
<=>timeout[volttron_3-volttron_instance1] PASSED [100%]

===== ERRORS _
<=>=====
_____ ERROR at setup of test_sqlite_timeout[volttron_3-
<=>volttron_instance0] _____

request = <SubRequest 'volttron_instance' for <Function test_sqlite_timeout[volttron_
<=>3-volttron_instance0]>>, kwargs = {}
```

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```

address = 'tcp://127.0.0.113:5846'

@pytest.fixture(scope="module",
                params=[
                    dict(messagebus='zmq', ssl_auth=False),
                    pytest.param(dict(messagebus='rmq', ssl_auth=True), marks=rmq_
↳skipif),
                ])
def volttron_instance(request, **kwargs):
    """Fixture that returns a single instance of volttron platform for testing

    @param request: pytest request object
    @return: volttron platform instance
    """
    address = kwargs.pop("vip_address", get_rand_vip())
    wrapper = build_wrapper(address,
                            messagebus=request.param['messagebus'],
                            ssl_auth=request.param['ssl_auth'],
                            **kwargs)
>

address = 'tcp://127.0.0.113:5846'
kwargs = {}
request = <SubRequest 'volttron_instance' for <Function test_sqlite_
↳timeout[volttron_3-volttron_instance0]>>

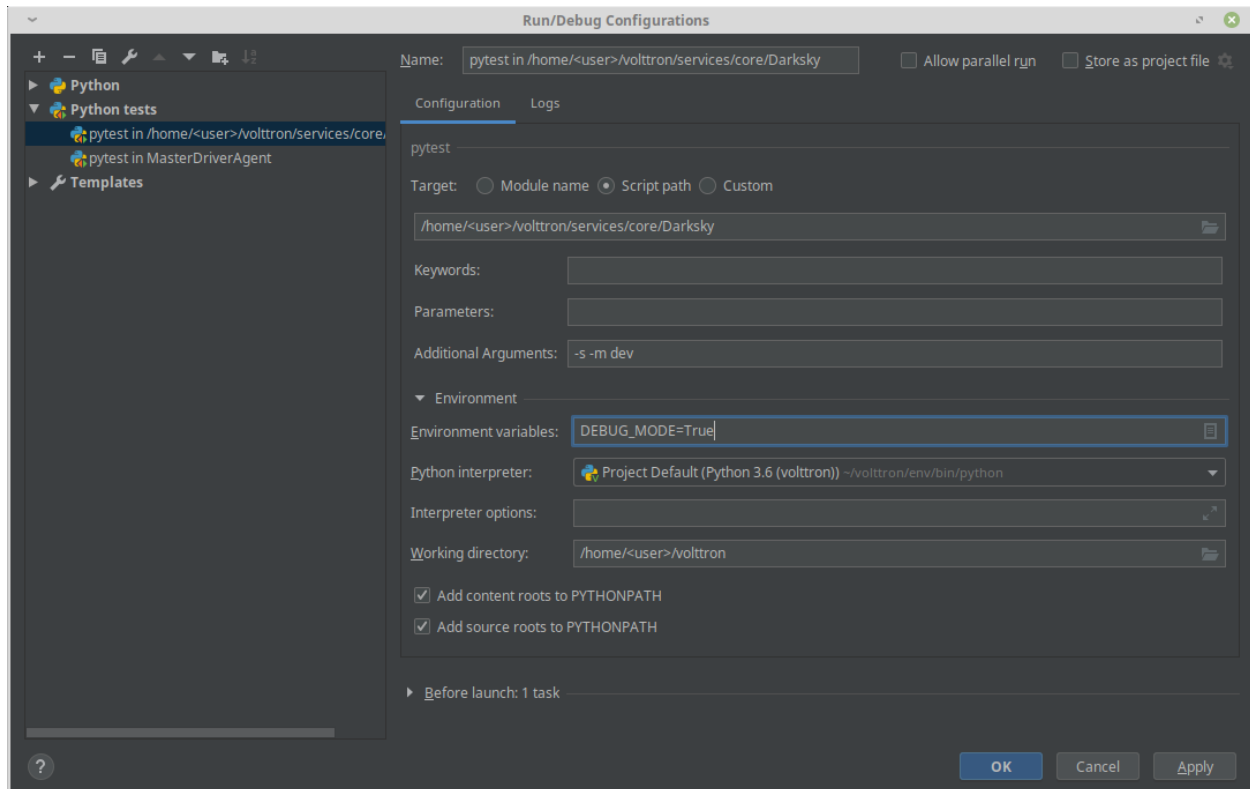
volttrontesting/fixtures/volttron_platform_fixtures.py:106:

```

## Running Tests Via PyCharm

To run our Pytests using PyCharm, we'll need to create a run configuration. To do so, select “edit configurations” from the “Run” menu (or if using the toolbar UI element you can click on the run configurations dropdown to select “edit configurations”). Use the plus symbol at the top right of the pop-up menu, scroll to “Python Tests” and expand this menu and select “pytest”. This will create a run configuration, which will then need to be filled out. We recommend the following in general:

- Set the “Script Path” radio and fill the form with the path to your module. Pytest will run any tests in that module using the discovery process described above (and any marks if specified)
- In the interpreter dropdown, select the VOLTRON virtual environment - this will likely be your project default
- Set the working directory to the VOLTRON root directory
- Add any environment variables - For debugging, add variable “DEBUG\_MODE” = True or “DEBUG” 1
- Add any optional arguments (-s will prevent standard output from being displayed in the console window, -m is used to specify a mark)



PyCharm testing instructions

More information on testing in Python

## Developing Historian Agents

Developing custom historians is considered an advanced development topic. If this is your first time developing a custom agent, consider starting with the general [Agent Development](#) page first. VOLTTRON provides a convenient base class for developing new historian agents. The base class automatically performs a number of important functions:

- subscribes to all pertinent topics
- caches published data to disk until it is successfully recorded to a historian
- creates the public facing interface for querying results
- spells out a simple interface for concrete implementation to meet to make a working Historian Agent
- breaks data to publish into reasonably sized chunks before handing it off to the concrete implementation for publication. The size of the chunk is configurable
- sets up a separate thread for publication. If publication code needs to block for a long period of time (up to 10s of seconds) this will no disrupt the collection of data from the bus or the functioning of the agent itself

The VOLTTRON repository provides several *historians* which can be deployed without modification.



## BaseHistorian

All Historians must inherit from the BaseHistorian class in `volttron.platform.agent.base_historian` and implement the following methods:

### `publish_to_historian(self, to_publish_list)`

This method is called by the BaseHistorian class when it has received data from the message bus to be published. *to\_publish\_list* is a list of records to publish in the form:

```
[
  {
    '_id': 1,
    'timestamp': timestamp,
    'source': 'scrape',
    'topic': 'campus/building/unit/point',
    'value': 90,
    'meta': {'units': 'F'}
  }
  ...
]
```

- **\_id** - ID of the record used for internal record tracking. All IDs in the list are unique
- **timestamp** - Python datetime object of the time data was published at timezone UTC
- **source** - Source of the data: can be scrape, analysis, log, or actuator
- **topic** - Topic data was published on, topic prefix's such as "device" are dropped
- **value** - Value of the data, can be any type.
- **meta** - Metadata for the value, some sources will omit this entirely.

For each item in the list the concrete implementation should attempt to publish (or discard if non-publishable) every item in the list. Publication should be batched if possible. For every successfully published record and every record that is to be discarded because it is non-publishable the agent must call *report\_handled* on those records. Records that should be published but were not for whatever reason require no action. Future calls to *publish\_to\_historian* will include these unpublished records. *publish\_to\_historian* is always called with the oldest unhandled records. This allows the historian to not lose data due to lost connections or other problems.

As a convenience *report\_all\_handled* can be called if all of the items in *published\_list* were successfully handled.

### `query_topic_list(self)`

Must return a list of all unique topics published.

**query\_historian(self, topic, start=None, end=None, skip=0, count=None, order=None)**

This function must return the results of a query in the form:

```
{ "values": [(timestamp1: value1), (timestamp2: value2), ...],  
  "metadata": { "key1": value1, "key2": value2, ...} }
```

metadata is not required (The caller will normalize this to {} for you if you leave it out)

- **topic** - the topic the user is querying for
- **start** - datetime of the start of the query, *None* for the beginning of time
- **end** - datetime of the end of the query, *None* for the end of time
- **skip** - skip this number of results (for pagination)
- **count** - return at maximum this number of results (for pagination)
- **order** - *FIRST\_TO\_LAST* for ascending time stamps, *LAST\_TO\_FIRST* for descending time stamps

**historian\_setup(self)**

Implementing this is optional. This function is run on the same thread as the rest of the concrete implementation at startup. It is meant for connection setup.

**Example Historian**

An example historian can be found in the *examples/CSVHistorian* directory in the VOLTTRON repository. This example historian uses a CSV file as the persistent data store. It is recommended to use this agent as a reference for developing new historian agents. The example is described in more detail [under the Example Agents subsection](#).

**Developing Market Agents**

VOLTTRON provides a convenient base class for developing new market agents. The base class automatically subscribes to all pertinent topics, and spells out a simple interface for concrete implementation to make a working Market Agent.

Markets are implemented by the Market Service Agent which is a core service agent. The Market Service Agent publishes information on several topics to which the base agent automatically subscribes. The base agent also provides all the methods you will need to interact with the Market Service Agent to implement your market transactions.

**MarketAgent**

All Market Agents must inherit from the MarketAgent class in *volttron.platform.agent.base\_market\_agent* and call the following method:

```
self.join_market(market_name, buyer_seller, reservation_callback, offer_callback,   
↳ aggregate_callback, price_callback, error_callback)
```

This method causes the market agent to join a single market. If the agent wishes to participate in several markets it may be called once for each market. The first argument is the name of the market to join and this name must be unique across the entire volttron instance because all markets are implemented by a single market service agent for

each volttron instance. The second argument describes the role that this agent wished to play in this market. The value is imported as:

```
from volttron.platform.agent.base_market_agent.buy_sell import BUYER, SELLER
```

Arguments 3-7 are callback methods that the agent may implement as needed for the agent's participation in the market.

### The Reservation Callback

```
reservation_callback(self, timestamp, market_name, buyer_seller)
```

This method is called when it is time to reserve a slot in the market for the current market cycle. If this callback is not registered a slot is reserved for every market cycle. If this callback is registered it is called for each market cycle and returns *True* if a reservation is wanted and *False* if a reservation is not wanted.

The name of the market and the roll being played are provided so that a single callback can handle several markets. If the agent joins three markets with the same reservation callback routine it will be called three times with the appropriate market name and buyer/seller role for each call. The MeterAgent example illustrates the use of this of this method and how to determine whether to make an offer when the reservation is refused.

A market will only exist if there are reservations for at least one buyer or one seller. If the market fails to achieve the minimum participation the error callback will be called. If only buyers or only sellers make reservations any offers will be rejected with the reason that the market has not formed.

### The Offer Callback

```
offer_callback(self, timestamp, market_name, buyer_seller)
```

If the agent has made a reservation for the market and a callback has been registered this callback is called. If the agent wishes to make an offer at this time the market agent computes either a supply or a demand curve as appropriate and offers the curve to the market service by calling the `make_offer` method.

The name of the market and the roll being played are provided so that a single callback can handle several markets.

For each market joined either an offer callback, an aggregate callback, or a cleared price callback is required.

### The Aggregate Callback

```
aggregate_callback(self, timestamp, market_name, buyer_seller, aggregate_curve)
```

When a market has received all its buy offers it calculates an aggregate demand curve. When the market receives all of its sell offers it calculates an aggregate supply curve. This callback delivers the aggregate curve to the market agent whenever the appropriate curve becomes available.

If the market agent wants to use this opportunity to make an offer on this or another market it would do that using the `make_offer` method.

- If the aggregate demand curve is received, only a supply offer may be submitted for this market
- If the aggregate supply curve is received, only make a demand offer will be accepted by this market.

You may use this information to make an offer on another market; The example AHUAgent does this. The name of the market and the roll being played are provided so that a single callback can handle several markets.

For each market joined, either an offer callback, an aggregate callback, or a cleared price callback is required.

### The Price Callback

```
price_callback(self, timestamp, market_name, buyer_seller, price, quantity)
```

This callback is called when the market clears. If the market agent wants to use this opportunity to make an offer on this or another market it would do that using the `make_offer` method.

Once the market has cleared you can not make an offer on that market. Again, you may use this information to make an offer on another market as in the example `AHUAgent`. The name of the market and the roll being played are provided so that a single callback can handle several markets.

For each market joined either an offer callback, an aggregate callback, or a cleared price callback is required.

### The Error Callback

```
error_callback(self, timestamp, market_name, buyer_seller, error_code, error_message,   
↳aux)
```

This callback is called when an error occurs isn't in response to an RPC call. The error codes are documented in:

```
from volttron.platform.agent.base_market_agent.error_codes import NOT_FORMED, SHORT_  
↳OFFERS, BAD_STATE, NO_INTERSECT
```

- `NOT_FORMED` - If a market fails to form this will be called at the offer time.
- `SHORT_OFFERS` - If the market doesn't receive all its offers this will be called while clearing the market.
- `BAD_STATE` - This indicates a bad state transition while clearing the market and should never happen, but may be called while clearing the market.
- `NO_INTERSECT` - If the market fails to clear this would be called while clearing the market and an auxillary array will be included. The auxillary array contains comparisons between the supply max, supply min, demand max and demand min. They allow the market client to make determinations about why the curves did not intersect that may be useful.

The error callback is optional, but highly recommended.

### Example Agents

Some example agents are included with the platform to help explore its features. These agents represent concrete implementations of important agent sub-types such as `Historians` or `Weather Agents`, or demonstrate a development pattern for accomplishing common tasks.

More complex agents contributed by other researchers can also be found in the examples directory. It is recommended that developers new to `VOLTTRON` understand the example agents first before diving into the other agents.

## C Agent

The C Agent uses the *ctypes* module to load a shared object into memory so its functions can be called from Python.

There are two versions of the C Agent:

- A standard agent that can be installed with the agent installation process
- A driver which can be controlled using the Platform Driver Agent

## Building the Shared Object

The shared object library must be built before installing C Agent examples. Running `make` in the C Agent source directory will compile the provided C code using the position independent flag, a requirement for creating shared objects.

Files created by `make` can be removed by running

```
make clean
```

## Agent Installation

After building the shared object library the standard agent can be installed with the `scripts/install-agent.py` script:

```
python scripts/install-agent.py -s examples/CAgent
```

The other is a driver interface for the Platform Driver. To use the C driver, the driver code file must be moved into the Platform Driver's *interfaces* directory:

```
examples/CAgent/c_agent/driver/cdriver -> services/core/PlatformDriverAgent/  
→ platform_driver/interfaces
```

The C Driver configuration tells the interface where to find the shared object. An example is available in the C Agent's *driver* directory.

## Config Actuation Example

The Config Actuation example attempts to set points on a device when files are added or updated in its *configuration store*.

## Configuration

The name of a configuration file must match the name of the device to be actuated. The configuration file is a JSON dictionary of point name and value pairs. Any number of points on the device can be listed in the config.

```
{  
  "point0": value,  
  "point1": value  
}
```

## CSV Historian

The CSV Historian Agent is an example historian agent that writes device data to the CSV file specified in the configuration file.

### Explanation of CSV Historian

The Utils module of the VOLTTRON platform includes functions for setting up global logging for the platform:

```
utils.setup_logging()
_log = logging.getLogger(__name__)
```

The historian function is called by `utils.vip_main` when the agents is started (see below). `utils.vip_main` expects a callable object that returns an instance of an Agent. This method of dealing with a configuration file and instantiating an Agent is common practice.

```
def historian(config_path, **kwargs):
    """
    This method is called by the main method to parse
    the passed config file or configuration dictionary object, validate the
    configuration entries, and create an instance of the CSVHistorian class
    :param config_path: could be a path to a configuration file or can be a
    ↳dictionary object
    :param kwargs: additional keyword arguments if any
    :return: an instance of :py:class:`CSVHistorian`
    """
    if isinstance(config_path, dict):
        config_dict = config_path
    else:
        config_dict = utils.load_config(config_path)

    output_path = config_dict.get("output", "historian_output.csv")

    return CSVHistorian(output_path=output_path, **kwargs)
```

All historians must inherit from *BaseHistorian*. The *BaseHistorian* class handles the capturing and caching of all device, logging, analysis, and record data published to the message bus.

```
class CSVHistorian(BaseHistorian):
```

The Base Historian creates a separate thread to handle publishing data to the data store. In this thread the Base Historian calls two methods on the created historian, `historian_setup` and `publish_to_historian`.

The Base Historian created the new thread in it's `__init__` method. This means that any instance variables must assigned in `__init__` before calling the Base Historian's `__init__` method.

```
def __init__(self, output_path="", **kwargs):
    self.output_path = output_path
    self.csv_dict = None
    self.csv_file = None
    self.default_dir = "./data"
    super(CSVHistorian, self).__init__(**kwargs)
```

Historian setup is called shortly after the new thread starts. This is where a Historian sets up a connect the first time. In our example we create the *Dictwriter* object that we will use to create and add lines to the CSV file.

We keep a reference to the file object so that we may flush its contents to disk after writing the header and after we have written new data to the file.

The CSV file we create will have 4 columns: *timestamp*, *source*, *topic*, and *value*.

```
def historian_setup(self):
    # if the current file doesn't exist, or the path provided doesn't include a
    ↪directory, use the default dir
    # in <agent_dir>/data
    if not (os.path.isfile(self.output_path) or os.path.isdir(self.output_
    ↪path)):
        if not os.path.isdir(self.default_dir):
            os.mkdir(self.default_dir)
        self.output_path = os.path.join(self.default_dir, self.output_path)

    self.csv_file = open(self.output_path, "w")

    self.csv_dict = csv.DictWriter(self.csv_file, fieldnames=["timestamp", "source
    ↪", "topic", "value"])
    self.csv_dict.writeheader()
    self.csv_file.flush()
```

`publish_to_historian` is called when data is ready to be published. It is passed a list of dictionaries. Each dictionary contains a record of a single value that was published to the message bus.

The dictionary takes the form:

```
{
    '_id': 1,
    'timestamp': timestamp1.replace(tzinfo=pytz.UTC), #Timestamp in UTC
    'source': 'scrape', #Source of the data point.
    'topic': "pnnl/isbl/hvac1/thermostat", #Topic that published to without prefix.
    'value': 73.0, #Value that was published
    'meta': {"units": "F", "tz": "UTC", "type": "float"} #Meta data published with
    ↪the topic
}
```

Once the data is written to the historian we call `self.report_all_handled()` to inform the *BaseHistorian* that all data we received was successfully published and can be removed from the cache. Then we can flush the file to ensure that the data is written to disk.

```
def publish_to_historian(self, to_publish_list):
    for record in to_publish_list:
        row = dict()
        row["timestamp"] = record["timestamp"]

        row["source"] = record["source"]
        row["topic"] = record["topic"]
        row["value"] = record["value"]

        self.csv_dict.writerow(row)

    self.report_all_handled()
    self.csv_file.flush()
```

This agent does not support the Historian Query interface.

## Agent Testing

The CSV Historian can be tested by running the included *launch\_my\_historian.sh* script.

## Agent Installation

This Agent may be installed on the platform using the *standard method*.

## Data Publisher

This is a simple agent that plays back data either from the config store or a CSV to the configured topic. It can also provide basic emulation of the Actuator Agent for testing agents that expect to be able to set points on a device in response to device publishes.

## Installation notes

In order to simulate the actuator you must install the agent with the *VIP Identity* of *platform.actuator*. If an actuator is already installed on the platform, this will cause VIP identity conflicts. To install the agent, the agent install script can be used:

```
python scripts/install-agent.py -s examples/DataPublisher -c <config file>
```

## Configuration

```
{
    # basetopic can be devices, analysis, or custom base topic
    "basepath": "devices/PNNL/ISB1",

    # use_timestamp uses the included in the input_data if present.
    # Currently the column must be named `Timestamp`.
    "use_timestamp": true,

    # Only publish data at most once every max_data_frequency seconds.
    # Extra data is skipped.
    # The time windows are normalized from midnight.
    # ie 900 will publish one value for every 15 minute window starting from
    # midnight of when the agent was started.
    # Only used if timestamp in input file is used.
    "max_data_frequency": 900,

    # The meta data published with the device data is generated
    # by matching point names to the unittype_map.
    "unittype_map": {
        ".*Temperature": "Fahrenheit",
        ".*SetPoint": "Fahrenheit",
        "OutdoorDamperSignal": "On/Off",
        "SupplyFanStatus": "On/Off",
        "CoolingCall": "On/Off",
        "SupplyFanSpeed": "RPM",
        "Damper*": "On/Off",
        "Heating*": "On/Off",
    }
}
```

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```

    "DuctStatic*." : "On/Off"
  },
  # Path to input CSV file.
  # May also be a list of records or reference to a CSV file in the config store.
  # Large CSV files should be referenced by file name and not
  # stored in the config store.
  "input_data": "econ_test2.csv",
  # Publish interval in seconds
  "publish_interval": 1,

  # Tell the playback to maintain the location a the file in the config store.
  # Playback will be resumed from this point
  # at agent startup even if this setting is changed to false before restarting.
  # Saves the current line in line_marker in the DataPublishers's config store
  # as plain text.
  # default false
  "remember_playback": true,

  # Start playback from 0 even if the line_marker configuration is set a non 0_
  ↪value.
  # default false
  "reset_playback": false,

  # Repeat data from the start if this flag is true.
  # Useful for data that does not include a timestamp and is played back in real_
  ↪time.
  "replay_data": false
}

```

## CSV File Format

The CSV file must have a single header line. The column names are appended to the *basepath* setting in the configuration file and the resulting topic is normalized to remove extra ` / ` characters. The values are all treated as floating point values and converted accordingly.

The corresponding device for each point is determined and the values are combined together to create an *all* topic publish for each device.

If a *Timestamp* column is in the input it may be used to set the timestamp in the header of the published data.

Timestamp	centrifugal_chiller/OutsideAirTemperature	centrifugal_chiller/DischargeAirTemperatureSetPoint
2012/05/19 05:07:00	0	56
2012/05/19 05:08:00	0	56
2012/05/19 05:09:00	0	56
2012/05/19 05:10:00	0	56
2012/05/19 05:11:00	0	56
2012/05/19 05:12:00	0	56
2012/05/19 05:13:00	0	56
2012/05/19 05:14:00	0	56
2012/05/19 05:15:00	0	56
2012/05/19 05:16:00	0	56
2012/05/19 05:17:00	0	56

Timestamp	centrifugal_chiller/OutsideAirTemperature	centrifugal_chiller/DischargeAirTemperatureSetPoint
2012/05/19 05:18:00	0	56
2012/05/19 05:19:00	0	56
2012/05/19 05:20:00	0	56
2012/05/19 05:21:00	0	56
2012/05/19 05:22:00	0	56
2012/05/19 05:23:00	0	56
2012/05/19 05:24:00	0	56
2012/05/19 05:25:00	48.78	56
2012/05/19 05:26:00	48.88	56
2012/05/19 05:27:00	48.93	56
2012/05/19 05:28:00	48.95	56
2012/05/19 05:29:00	48.92	56
2012/05/19 05:30:00	48.88	56
2012/05/19 05:31:00	48.88	56
2012/05/19 05:32:00	48.99	56
2012/05/19 05:33:00	49.09	56
2012/05/19 05:34:00	49.11	56
2012/05/19 05:35:00	49.07	56
2012/05/19 05:36:00	49.05	56
2012/05/19 05:37:00	49.09	56
2012/05/19 05:38:00	49.13	56
2012/05/19 05:39:00	49.09	56
2012/05/19 05:40:00	49.01	56
2012/05/19 05:41:00	48.92	56
2012/05/19 05:42:00	48.86	56
2012/05/19 05:43:00	48.92	56
2012/05/19 05:44:00	48.95	56
2012/05/19 05:45:00	48.92	56
2012/05/19 05:46:00	48.86	56
2012/05/19 05:47:00	48.78	56
2012/05/19 05:48:00	48.69	56
2012/05/19 05:49:00	48.65	56
2012/05/19 05:50:00	48.65	56
2012/05/19 05:51:00	48.65	56
2012/05/19 05:52:00	48.61	56
2012/05/19 05:53:00	48.59	56
2012/05/19 05:54:00	48.55	56
2012/05/19 05:55:00	48.63	56
2012/05/19 05:56:00	48.76	56
2012/05/19 05:57:00	48.95	56
2012/05/19 05:58:00	49.24	56
2012/05/19 05:59:00	49.54	56
2012/05/19 06:00:00	49.71	56
2012/05/19 06:01:00	49.79	56
2012/05/19 06:02:00	49.94	56
2012/05/19 06:03:00	50.13	56
2012/05/19 06:04:00	50.18	56
2012/05/19 06:05:00	50.15	56

## DDS Agent

The DDS example agent demonstrates VOLTTRON's capacity to be extended with tools and libraries not used in the core codebase. DDS is a messaging platform that implements a publish-subscribe system for well defined data types.

This agent example is meant to be run the command line, as opposed to installing it like other agents. From the *examples/DDSAgent* directory, the command to start it is:

```
$ AGENT_CONFIG=config python -m ddsagent.agent
```

The *rticonnextdds-connector* library needs to be installed for this example to function properly. We'll retrieve it from GitHub since it is not available through Pip. Download the source with:

```
$ wget https://github.com/rticommunity/rticonnextdds-connector/archive/master.zip
```

and unpack it in *examples/DDSAgent/ddsagent* with:

```
$ unzip master.zip
```

The `demo_publish()` output can be viewed with the *rtishapesdemo* available from RTI.

## Configuration

Each data type that this agent will have access to needs to have an XML document defining its structure. The XML will include a participant name, publisher name, and a subscriber name. These are recorded in the configuration with the location on disk of the XML file.

```
{
  "square": {
    "participant_name": "MyParticipantLibrary::Zero",
    "xml_config_path": "./ddsagent/rticonnextdds-connector-master/examples/python/
↪ShapeExample.xml",
    "publisher_name": "MyPublisher::MySquareWriter",
    "subscriber_name": "MySubscriber::MySquareReader"
  }
}
```

## Listener Agent

The ListenerAgent subscribes to all topics and is useful for testing that agents being developed are publishing correctly. It also provides a template for building other agents as it expresses the requirements of a platform agent.

## Explanation of Listener Agent Code

Use `utils` to setup logging, which we'll use later.

```
utils.setup_logging()
_log = logging.getLogger(__name__)
```

The Listener agent extends (inherits from) the Agent class for its default functionality such as responding to platform commands:

```
class ListenerAgent (Agent) :  
    '''  
    Listens to everything and publishes a heartbeat according to the  
    heartbeat period specified in the settings module.  
    '''
```

After the class definition, the Listener agent reads the configuration file, extracts the configuration parameters, and initializes any Listener agent instance variable. This is done through the agent's `__init__` method:

```
def __init__(self, config_path, **kwargs):  
    super(ListenerAgent, self).__init__(**kwargs)  
    self.config = utils.load_config(config_path)  
    self._agent_id = self.config.get('agentid', DEFAULT_AGENTID)  
    log_level = self.config.get('log-level', 'INFO')  
    if log_level == 'ERROR':  
        self._logfn = _log.error  
    elif log_level == 'WARN':  
        self._logfn = _log.warn  
    elif log_level == 'DEBUG':  
        self._logfn = _log.debug  
    else:  
        self._logfn = _log.info
```

Next, the Listener agent will run its setup method. This method is tagged to run after the agent is initialized by the decorator `@Core.receiver('onsetup')`. This method accesses the configuration parameters, logs a message to the platform log, and sets the agent ID.

```
@Core.receiver('onsetup')  
def onsetup(self, sender, **kwargs):  
    # Demonstrate accessing a value from the config file  
    _log.info(self.config.get('message', DEFAULT_MESSAGE))  
    self._agent_id = self.config.get('agentid')
```

The Listener agent subscribes to all topics published on the message bus. Publish and subscribe interactions with the message bus are handled by the *PubSub* module located at `~/volttron/volttron/platform/vip/agent/subsystems/pubsub.py`.

The Listener agent uses an empty string to subscribe to all messages published. This is done in a *decorator* for simplifying subscriptions.

```
@PubSub.subscribe('pubsub', '')  
def on_match(self, peer, sender, bus, topic, headers, message):  
    '''Use match_all to receive all messages and print them out.'''  
    if sender == 'pubsub.compat':  
        message = compat.unpack_legacy_message(headers, message)  
    self._logfn(  
        "Peer: %r, Sender: %r:, Bus: %r, Topic: %r, Headers: %r, "  
        "Message: %r", peer, sender, bus, topic, headers, message)
```

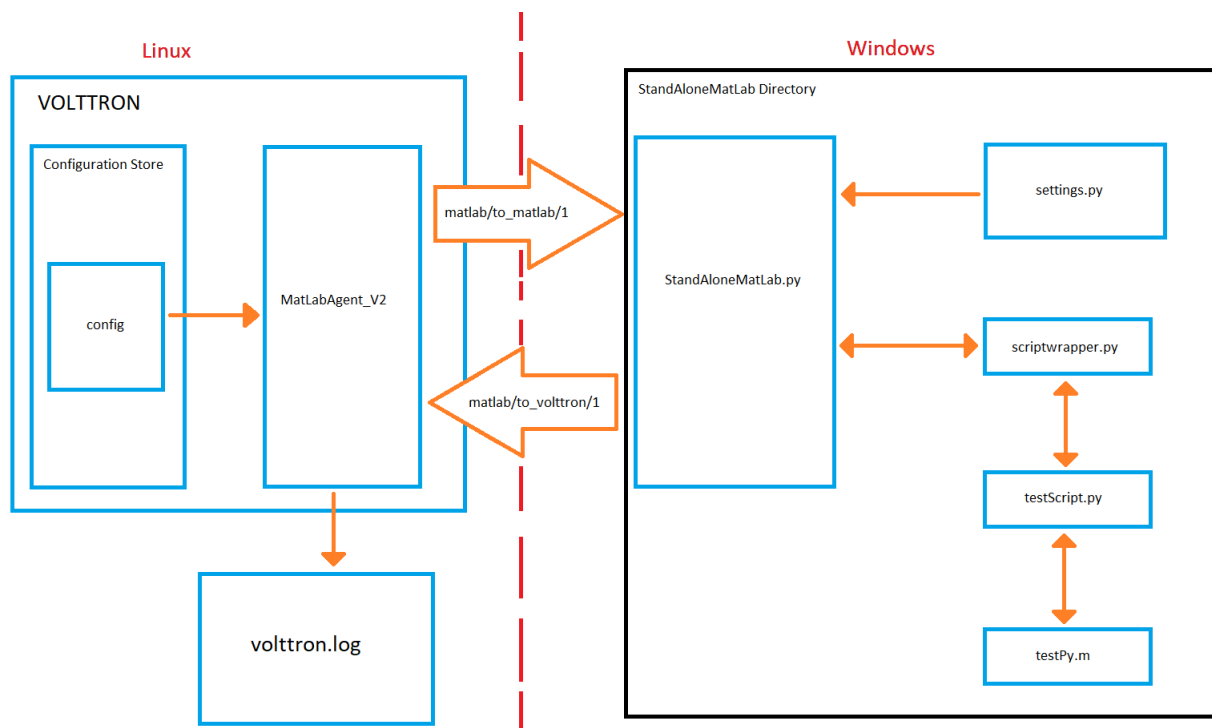
## MatLab Agent

The MatLab agent and Matlab Standalone Agent together are example agents that allow for MatLab scripts to be run in a Windows environment and interact with the VOLTRON platform running in a Linux environment.

The MatLab agent takes advantage of the config store to dynamically send scripts and commandline arguments across the message bus to one or more Standalone Agents in Windows. The Standalone Agent then executes the requested script and arguments, and sends back the results to the MatLab agent.

## Overview of Matlab Agents

There are multiple components that are used for the MatLab agent. This diagram is to represent the components that are connected to the MatLab Agents. In this example, the scripts involved are based on the default settings in the MatLab Agent.



## MatLabAgentV2

MatLabAgentV2 publishes the name of a python script along with any command line arguments that are needed for the script to the appropriate topic. The agent then listens on another topic, and whenever anything is published on this topic, it stores the message in the log file chosen when the VOLTRON instance is started. If there are multiple standalone agents, the agent can send a script to each of them, along with their own set of command line arguments. In this case, each script name and set of command line arguments should be sent to separate subtopics. This is done so that no matter how many standalone agents are in use, MatLabAgentV2 will record all of their responses.

```
class MatlabAgentV2 (Agent) :

    def __init__(self, script_names=[], script_args=[], topics_to_matlab=[],
                 topics_to_volttron=None, **kwargs) :
```

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```

super(MatlabAgentV2, self).__init__(**kwargs)
_log.debug("vip_identity: " + self.core.identity)

self.script_names = script_names
self.script_args = script_args
self.topics_to_matlab = topics_to_matlab
self.topics_to_volttron = topics_to_volttron
self.default_config = {"script_names": script_names,
                        "script_args": script_args,
                        "topics_to_matlab": topics_to_matlab,
                        "topics_to_volttron": topics_to_volttron}

#Set a default configuration to ensure that self.configure is called
↳ immediately to setup
#the agent.
self.vip.config.set_default("config", self.default_config)
#Hook self.configure up to changes to the configuration file "config".
self.vip.config.subscribe(self.configure, actions=["NEW", "UPDATE"], pattern=
↳ "config")

def configure(self, config_name, action, contents):
    """
    Called after the Agent has connected to the message bus.
    If a configuration exists at startup this will be
    called before onstart.
    Is called every time the configuration in the store changes.
    """
    config = self.default_config.copy()
    config.update(contents)

    _log.debug("Configuring Agent")

    try:
        script_names = config["script_names"]
        script_args = config["script_args"]
        topics_to_matlab = config["topics_to_matlab"]
        topics_to_volttron = config["topics_to_volttron"]

    except ValueError as e:
        _log.error("ERROR PROCESSING CONFIGURATION: {}".format(e))
        return

    self.script_names = script_names
    self.script_args = script_args
    self.topics_to_matlab = topics_to_matlab
    self.topics_to_volttron = topics_to_volttron
    self._create_subscriptions(self.topics_to_volttron)

    for script in range(len(self.script_names)):
        cmd_args = ""
        for x in range(len(self.script_args[script])):
            cmd_args += ", {}".format(self.script_args[script][x])
        _log.debug("Publishing on: {}".format(self.topics_to_matlab[script]))
        self.vip.pubsub.publish('pubsub', topic=self.topics_to_matlab[script],
                                message="{}".format(self.script_names[script], cmd_args))
        _log.debug("Sending message: {}".format(self.script_names[script], cmd_
↳ args))

```

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```
_log.debug("Agent Configured!")
```

For this example, the agent is publishing to the *matlab/to\_matlab/1* topic, and is listening to the *matlab/to\_volttron* topic. It is sending the script name *testScript.py* with the argument 20. These are the default values found in the agent, if no configuration is loaded.

```
script_names = config.get('script_names', ["testScript.py"])
script_args = config.get('script_args', [["20"]])
topics_to_matlab = config.get('topics_to_matlab', ["matlab/to_matlab/1"])
topics_to_volttron = config.get('topics_to_volttron', "matlab/to_volttron/")
```

## StandAloneMatLab.py

The *StandAloneMatLab.py* script is a standalone agent designed to be able to run in a Windows environment. Its purpose is to listen to a topic, and when something is published to this topic, it takes the message, and sends it to the *script\_runner* function in *scriptwrapper.py*. This function processes the inputs, and then the output is published to another topic.

```
class StandAloneMatLab(Agent):
    '''The standalone version of the MatLab Agent'''

    @PubSub.subscribe('pubsub', _topics['volttron_to_matlab'])
    def print_message(self, peer, sender, bus, topic, headers, message):
        print('The Message is: ' + str(message))
        messageOut = script_runner(message)
        self.vip.pubsub.publish('pubsub', _topics['matlab_to_volttron'],
        ↪message=messageOut)
```

## settings.py

The topic to listen to and the topic to publish to are defined in *settings.py*, along with the information needed to connect the Standalone Agent to the primary VOLTRON instance. These should be the same topics that the MatLabAgentV2 is publishing and listening to, so that the communication can be successful. To connect the Standalone Agent to the primary VOLTRON instance, the IP address and port of the instance are needed, along with the server key.

```
_topics = {
    'volttron_to_matlab': 'matlab/to_matlab/1',
    'matlab_to_volttron': 'matlab/to_volttron/1'
}

# The parameters dictionary is used to populate the agent's
# remote vip address.
_params = {
    # The root of the address.
    # Note:
    # 1. volttron instance should be configured to use tcp. use command vcfg
    # to configure
    'vip_address': 'tcp://192.168.56.101',
    'port': 22916,

    # public and secret key for the standalone_matlab agent.
```

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```

# These can be created using the command: volttron-ctl auth keypair
# public key should also be added to the volttron instance auth
# configuration to enable standalone agent access to volttron instance. Use
# command 'vctl auth add' Provide this agent's public key when prompted
# for credential.

'agent_public': 'dpu13XKPvGB3XJNVUusCNn2U0kIWcuyDIP5J8mAgBQ0',
'agent_secret': 'Hlya-6BvfUot5USdeDHZ8eksDkWgEEHABs1SElmQhMs',

# Public server key from the remote platform. This can be
# obtained using the command:
# volttron-ctl auth serverkey
'server_key': 'QTIZrRGQ0-b-37AbEYDuMA0l2ETrythM2Vlac0v9CTA'
}

def remote_url():
    return "{vip_address}:{port}?serverkey={server_key}" \
           "&publickey={agent_public}&" \
           "secretkey={agent_secret}".format(**_params)

```

The primary VOLTTRON instance will then need to add the public key from the Standalone Agent. In this example, the topic that the Standalone Agent is listening to is *matlab/to\_matlab/1*, and the topic it is publishing to is *matlab/to\_volttron/1*.

### scriptwrapper.py

*Scriptwrapper.py* contains the *script\_runner* function. The purpose of this function is to take in a string that contains a Python script and command line arguments separated by commas. This string is parsed and passed to the system arguments, which allows the script sent to the function to use the command line arguments. The function then redirects standard output to a *StringIO* file object, and then attempts to execute the script. If there are any errors with the script, the error that is generated is returned to the standalone agent. Otherwise, the file object stores the output from the script, is converted to a string, and is sent to the standalone agent. In this example, the script that is to be run is *testScript.py*.

```

#Script to take in a string, run the program,
#and output the results of the command as a string.

import time
import sys
from io import StringIO

def script_runner(message):
    original = sys.stdout
    # print(message)
    # print(sys.argv)
    sys.argv = message.split(',')
    # print(sys.argv)

    try:
        out = StringIO()
        sys.stdout = out
        exec(open(sys.argv[0]).read())

```

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```
sys.stdout = original
    return out.getvalue()
except Exception as ex:
    out = str(ex)
    sys.stdout = original
    return out
```

**Note:** The script that is to be run needs to be in the same folder as the agent and the *scriptwrapper.py* script. The *script\_runner* function needs to be edited if it is going to call a script at a different location.

### testScript.py

This is a very simple test script designed to demonstrate the calling of a MatLab function from within Python. First it initializes the MatLab engine for Python. It then takes in a single command line argument, and passes it to the MatLab function *testPy.m*. If no arguments are sent, it will send 0 to the *testPy.m* function. It then prints the result of the *testPy.m* function. In this case, since standard output is being redirected to a file object, this is how the result is passed from this function to the Standalone Agent.

```
import matlab.engine
import sys

eng = matlab.engine.start_matlab()

if len(sys.argv) == 2:
    result = eng.testPy(float(sys.argv[1]))
else:
    result = eng.testPy(0.0)

print(result)
```

### testPy.m

This MatLab function is a very simple example, designed to show a function that takes an argument, and produces an array as the output. The input argument is added to each element in the array, and the entire array is then returned.

```
function out = testPy(z)
x = 1:100
out = x + z
end
```

## Setup on Linux

1. Setup and run VOLTTRON from develop branch using instructions [here](#).
2. Configure volttron instance using the `vcfg` command. When prompted for the vip address use `tcp://<ip address of the linux machine>`. This is necessary to enable volttron communication with external processes.

---

**Note:** If you are running VOLTTRON from within VirtualBox, it would be good to set one of your adapters as a *Host-only* adapter. This can be done within the VM's settings, under the *Network* section. Once this is done, use this IP for the VIP address.

---

3. Update the configuration for MatLabAgent\_v2 at `<volttron source dir>/example/MatLabAgent_v2/config`.

The configuration file for the MatLab agent has four variables.

1. `script_names`
2. `script_args`
3. `topics_to_matlab`
4. `topics_to_volttron`

An example config file included with the folder.

```
{
  # VOLTTRON config files are JSON with support for python style comments.
  "script_names": ["testScript.py"],
  "script_args": [["20"]],
  "topics_to_matlab": ["matlab/to_matlab/1"],
  "topics_to_volttron": "matlab/to_volttron/"
}
```

To edit the configuration, the format should be as follows:

```
{
  "script_names": ["script1.py", "script2.py", "..."],
  "script_args": [["arg1", "arg2"], ["arg1"], ["..."]],
  "topics_to_matlab": ["matlab/to_matlab/1", "matlab/to_matlab/2", "..."],
  "topics_to_volttron": "matlab/to_volttron/"
}
```

The config requires that each script name lines up with a set of commandline arguments and a topic. A commandline argument must be included, even if it is not used. The placement of brackets are important, even when only communicating with one standalone agent.

For example, if only one standalone agent is used, and no command line arguments are in place, the config file may look like this.

```
{
  "script_names": ["testScript.py"],
  "script_args": [["0"]],
  "topics_to_matlab": ["matlab/to_matlab/1"],
  "topics_to_volttron": "matlab/to_volttron/"
}
```

4. Install MatLabAgent\_v2 and start agent (from volttron root directory)

```
python ./scripts/install-agent.py -s examples/MatLabAgent_v2 --start
```

**Note:** The MatLabAgent\_v2 publishes the command to be run to the message bus only on start or on a configuration update. Once we configure the *standalone\_matlab* agent on the Windows machine, we will send a configuration update to the running MatLabAgent\_v2. The configuration would contain the topics to which the Standalone Agent is listening to and will be publishing result to.

#### See also:

The MatLab agent uses the configuration store to dynamically change inputs. More information on the config store and how it used can be found [here](#).

- [VOLTRON Configuration Store](#)
- [Agent Configuration Store](#)
- [Agent Configuration Store Interface](#)

5. Run the below command and make a note of the server key. This is required for configuring the stand alone agent on Windows. (This is run on the linux machine)

```
vctl auth serverkey
```

## Setup on Windows

### Install pre-requisites

1. Install Python3.6 64-bit from the [Python website](#).
2. Install the MatLab engine from [MathWorks](#).

**Warning:** The MatLab engine for Python only supports certain version of Python depending on the version of MatLab used. Please check [here](#) to see if the current version of MatLab supports your version of Python.

**Note:** At this time, you may want to verify that you are able to communicate with your Linux machine across your network. The simplest method would be to open up the command terminal and use `ping <ip of Linux machine>`, and `telnet <ip of Linux machine> <port of volttron instance, default port is 22916>`. Please make sure that the port is opened for outside access.

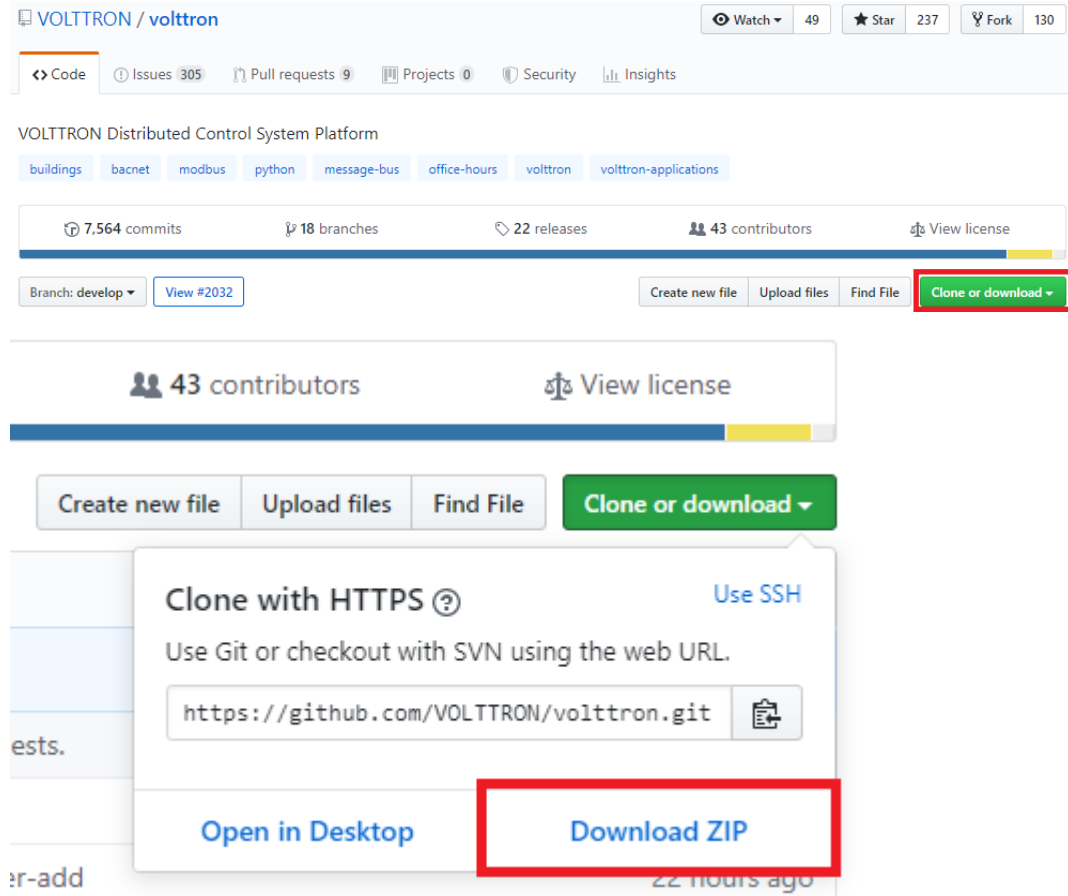
## Install Standalone MatLab Agent

The standalone MatLab agent is designed to be usable in a Windows environment.

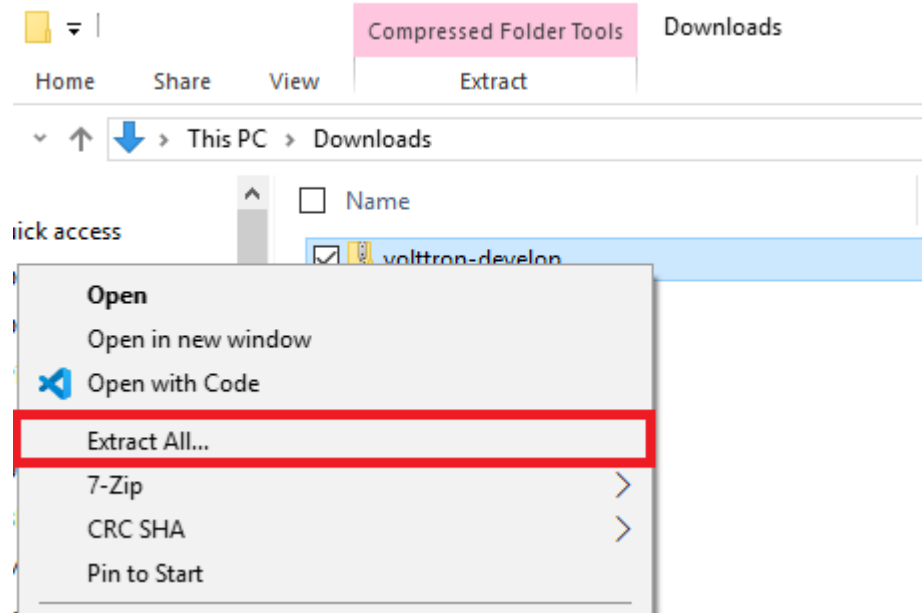
**Warning:** VOLTTRON is not designed to run in a Windows environment. Outside of cases where it is stated to be usable in a Windows environment, it should be assumed that it will **NOT** function as expected.

### 1. Download VOLTTRON

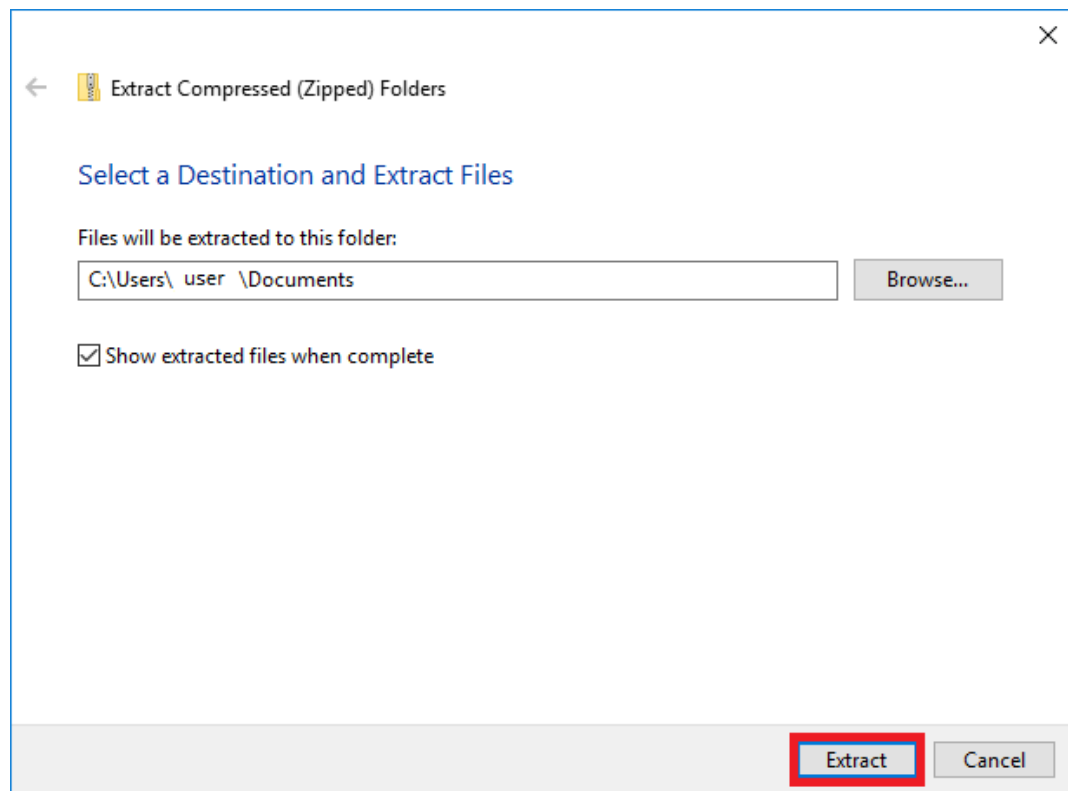
Download the VOLTTRON develop repository from Github. Download the zip from [GitHub](#).



Once the zipped file has been downloaded, go to your *Downloads* folder, right-click on the file, and select *Extract All...*

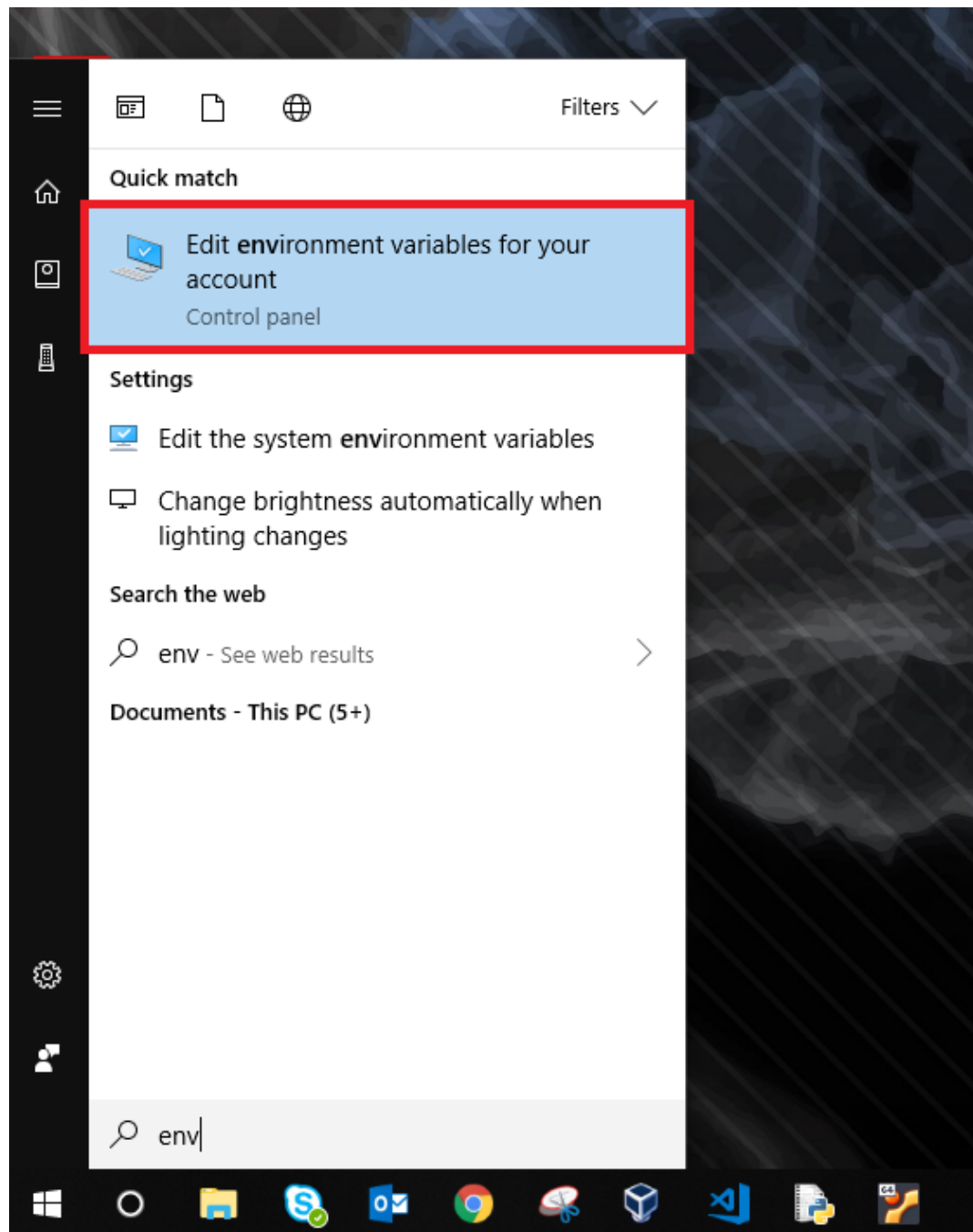


Choose a location for the extracted folder, and select “Extract”

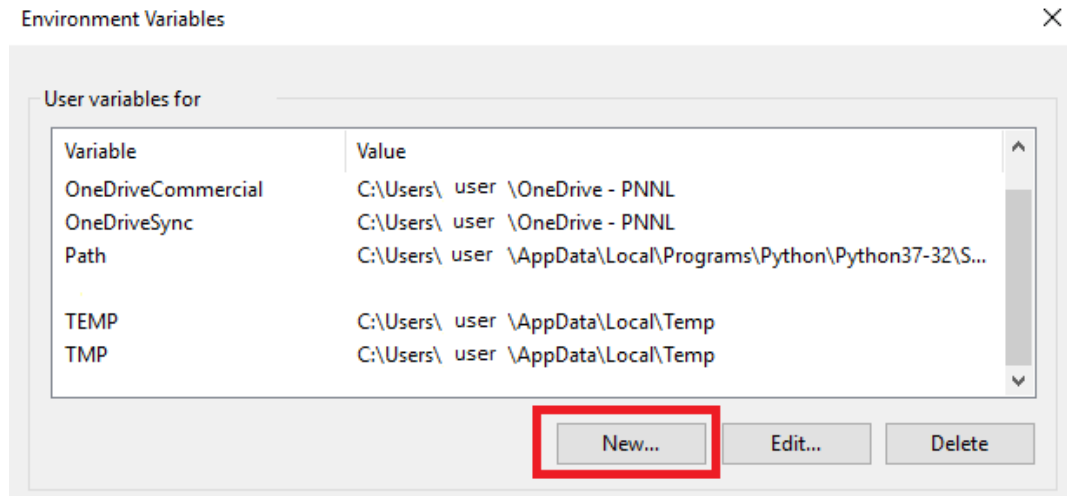


## 2. Setup the `PYTHONPATH`

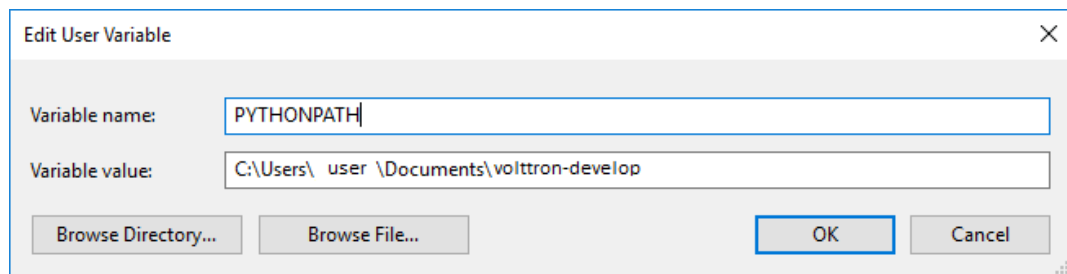
Open the Windows explorer, and navigate to *Edit environment variables for your account*.



Select “New”



For “Variable name” enter: PYTHONPATH For “Variable value” either browse to your VOLTRON installation, or enter in the path to your VOLTRON installation.



Select *OK* twice.

### 3. Set Python version in MatLab

Open your MatLab application. Run the command:

```
pyversion
```

This should print the path to Python2.7. If you have multiple versions of python on your machine and *pyversion* points to a different version of Python, use:

```
pyversion /path/to/python.exe
```

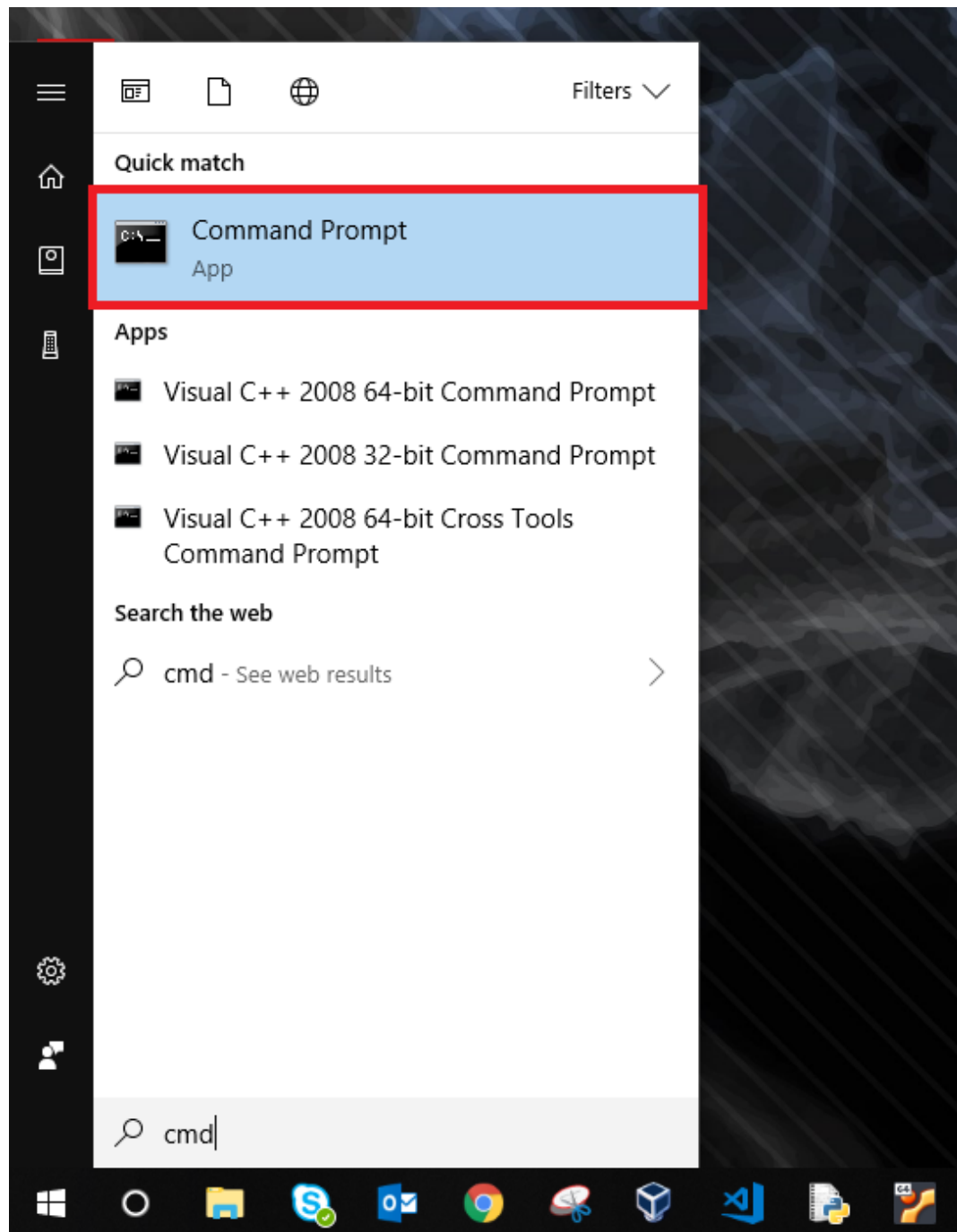
to set the appropriate version of python for your system.

For example, to use python 3.6 with MatLab:

```
pyversion C:\Python36\python.exe
```

### 4. Set up the environment.

Open up the command prompt



Navigate to your VOLTTRON installation

```
cd \Your\directory\path\to\volttron-develop
```

Use pip to install and setup dependencies.

```
pip install -r examples\StandAloneMatLab\requirements.txt
```

```
pip install -e .
```

**Note:** If you get the error doing the second step because of an already installed volttron from a different directory, manually delete the *volttron-egg*. link file from your *<python path>\Lib\site-*



*packages* directory (for example:

```
del C:\\Python27\\lib\\site-packages\\volttron-egg.link
```

and re-run the second command

## 5. Configure the agent

The configuration settings for the standalone agent are in `setting.py` (located in `volttron-develop\\examples\\StandAloneMatLab\\`)

### **settings.py**

- `volttron_to_matlab` needs to be set to the topic that will send your script and command line arguments to your stand alone agent. This was defined in the [config](#).
- `matlab_to_volttron` needs to be set to the topic that will send your script's output back to your volttron platform. This was defined in [config](#).
- `vip_address` needs to be set to the address of your volttron instance
- `port` needs to be set to the port of your volttron instance
- `server_key` needs to be set to the public server key of your primary volttron platform. This can be obtained from the primary volttron platform using `vctl auth serverkey` (VOLTRON must be running to use this command.)

It is possible to have multiple standalone agents running. In this case, copy the `StandAloneMatLab` folder, and make the necessary changes to the new `settings.py` file. Unless it is connecting to a separate VOLTRON instance, you should only need to change the `volttron_to_matlab` setting.

**Note:** It is recommended that you generate a new “agent\_public” and “agent\_private” key for your standalone agent. This can be done using the `vctl auth keypair` command on your primary VOLTRON platform on Linux. If you plan to use multiple standalone agents, they will each need their own keypair.

## 6. Add standalone agent key to VOLTRON platform

- Copy the public key from `settings.py` in the `StandAloneMatLab` folder.
- While the primary VOLTRON platform is running on the linux machine, add the agent public key using the `vctl auth` command on the Linux machine. This will make VOLTRON platform allow connections from the standalone agent

```
vctl auth add --credentials <standalone agent public key>
```

## 7. Run standalone agent

At this point, the agent is ready to run. To use the agent, navigate to the example folder and use `python` to start the agent. The agent will then wait for a message to be published to the selected topic by the MatLab agent.

```
cd examples\\StandAloneMatLab\\
python standalone_matlab.py
```

The output should be similar to this:

```
2019-08-01 10:42:47,592 volttron.platform.vip.agent.core DEBUG: identity:↵
↵standalone_matlab
2019-08-01 10:42:47,592 volttron.platform.vip.agent.core DEBUG: agent_
↵uuid: None
2019-08-01 10:42:47,594 volttron.platform.vip.agent.core DEBUG:↵
↵serverkey: None
2019-08-01 10:42:47,596 volttron.platform.vip.agent.core DEBUG: AGENT↵
↵RUNNING on ZMQ Core standalone_matlab
2019-08-01 10:42:47,598 volttron.platform.vip.zmq_connection DEBUG: ZMQ↵
↵connection standalone_matlab
2019-08-01 10:42:47,634 volttron.platform.vip.agent.core INFO: Connected↵
↵to platform: router: ebae9efa-5e8f-49e3-95a0-2020ddff9e8a version: 1.0↵
↵identity: standalone_matlab
2019-08-01 10:42:47,634 volttron.platform.vip.agent.core DEBUG: Running↵
↵onstart methods.
```

---

**Note:** If you have Python3 as your default Python run the command `python -2 standalone_matlab.py`

---

8. On the Linux machine configure the Matlab Agent to publish commands to the topic standalone agent is listening to. To load a new configuration or to change the current configuration enter

```
vctl config store <agent vip identity> config <path\to\configfile>
```

Whenever there is a change in the configuration in the config store, or whenever the agent starts, the MatLab Agent sends the configured command to the topic configured. As long as the standalone agent has been started and is listening to the appropriate topic, the output in the log should look similar to this:

```
2019-08-01 10:43:18,925 (matlab_agentV2agent-0.3 3539) matlab_agentV2.agent↵
↵DEBUG: Configuring Agent
2019-08-01 10:43:18,926 (matlab_agentV2agent-0.3 3539) matlab_agentV2.agent↵
↵DEBUG: Publishing on: matlab/to_matlab/1
2019-08-01 10:43:18,926 (matlab_agentV2agent-0.3 3539) matlab_agentV2.agent↵
↵DEBUG: Sending message: testScript2.py,20
2019-08-01 10:43:18,926 (matlab_agentV2agent-0.3 3539) matlab_agentV2.agent↵
↵DEBUG: Agent Configured!
2019-08-01 10:43:18,979 (matlab_agentV2agent-0.3 3539) matlab_agentV2.agent↵
↵INFO: Agent: matlab/to_volttron/1
Message:
'20'
```

Once the matlab agent publishes the message (in the above case, “testScript2.py,20”) on the windows command prompt running the standalone agent, you should see the message that was received by the standalone agent.

```
2019-08-01 10:42:47,671 volttron.platform.vip.agent.subsystems.configstore↵
↵DEBUG: Processing callbacks for affected files: {}
The Message is: testScript2.py,20
```

---

**Note:** If MatLabAgent\_v2 has been installed and started, and you have not started the *standalone\_matlab agent*, you will need to either restart the `matlab_agentV2`, or make a change to the configuration in the config store to send command to the topic standalone agent is actively listening to.

---

## Node Red Example

Node Red is a visual programming language wherein users connect small units of functionality “nodes” to create “flows”.

There are two example nodes that allow communication between Node-Red and VOLTTRON. One node reads subscribes to messages on the VOLTTRON message bus and the other publishes to it.

## Dependencies

The example nodes depend on *python-shell* to be installed and available to the Node Red environment.

## Installation

Copy all files from *volttron/examples/NodeRed* to your *~/.node-red/nodes* directory. *~/.node-red* is the default directory for Node Red files. If you have set a different directory use that instead.

Set the variables at the beginning of the *volttron.js* file to be a valid VOLTTRON environment, VOLTTRON home, and Python PATH.

Valid CURVE keys need to be added to the *settings.py* file. If they are generated with the *vctl auth keypair* command then the public key should be added to VOLTTRON’s authorization file with the following:

```
$ vctl auth add
```

The serverkey can be found with:

```
$ vctl auth serverkey
```

## Usage

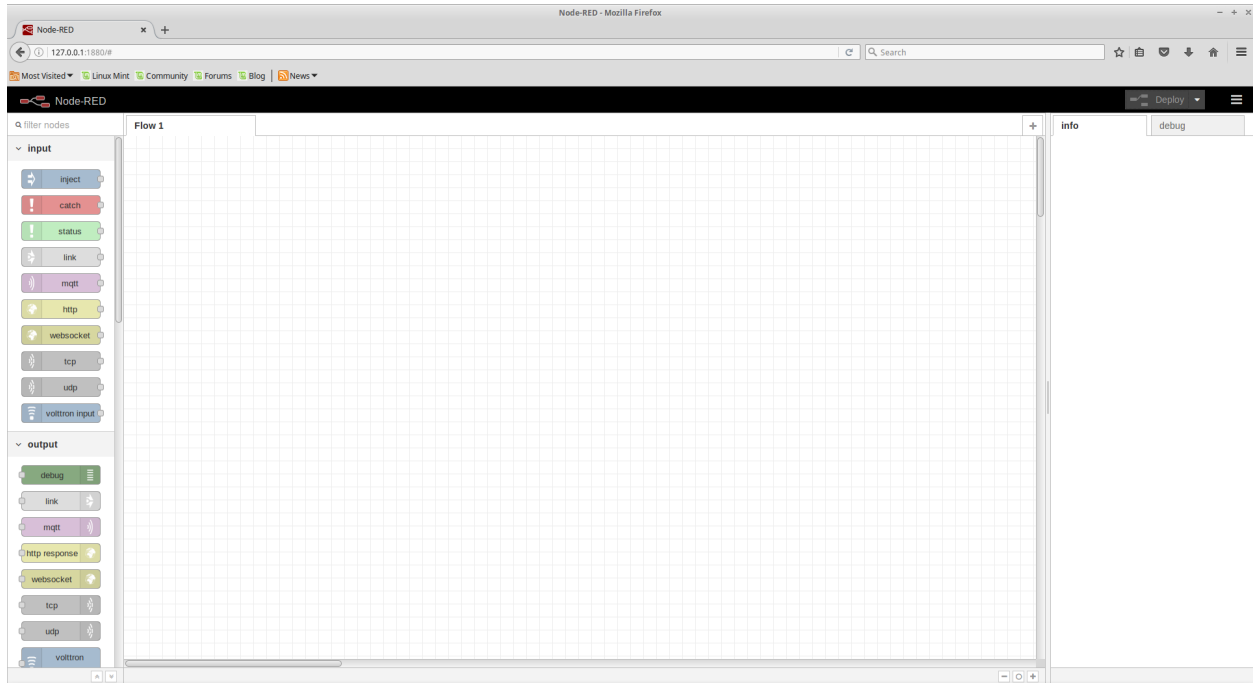
Start VOLTTRON and Node Red.

```
$ node-red

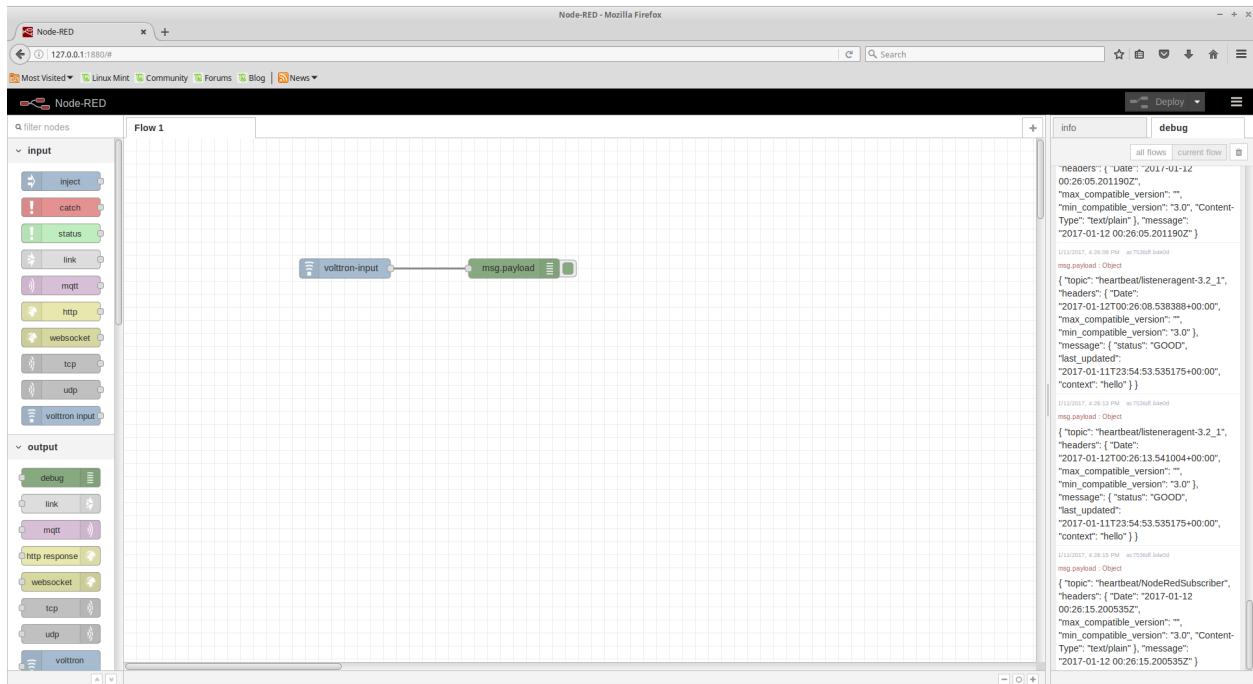
Welcome to Node-RED
=====

11 Jan 15:26:49 - [info] Node-RED version: v0.14.4
11 Jan 15:26:49 - [info] Node.js version: v0.10.25
11 Jan 15:26:49 - [info] Linux 3.16.0-38-generic x64 LE
11 Jan 15:26:49 - [info] Loading palette nodes
11 Jan 15:26:49 - [warn] -----
11 Jan 15:26:49 - [warn] [rpi-gpio] Info : Ignoring Raspberry Pi specific node
11 Jan 15:26:49 - [warn] -----
11 Jan 15:26:49 - [info] Settings file : /home/volttron/.node-red/settings.js
11 Jan 15:26:49 - [info] User directory : /home/volttron/.node-red
11 Jan 15:26:49 - [info] Flows file : /home/volttron/.node-red/flows_volttron.json
11 Jan 15:26:49 - [info] Server now running at http://127.0.0.1:1880/
11 Jan 15:26:49 - [info] Starting flows
11 Jan 15:26:49 - [info] Started flows
```

The output from the Node Red command indicates the address of its web interface. Nodes available for use are in the left sidebar.



We can now use the VOLTTRON nodes to read from and write to VOLTTRON.



## Scheduler Example Agent

The Scheduler Example Agent demonstrates how to use the scheduling feature of the :ref:Actuator Agent <Actuator-Agent> as well as how to send a command. This agent publishes a request for a reservation on a (fake) device then takes an action when it's scheduled time appears. The ActuatorAgent must be running to exercise this example.

---

**Note:** Since there is no actual device, an error is produced when the agent attempts to take its action.

---

```
def publish_schedule(self):
    '''Periodically publish a schedule request'''
    headers = {
        'AgentID': agent_id,
        'type': 'NEW_SCHEDULE',
        'requesterID': agent_id, #The name of the requesting agent.
        'taskID': agent_id + "-ExampleTask", #The desired task ID for this task. It_
        ↪must be unique among all other scheduled tasks.
        'priority': 'LOW', #The desired task priority, must be 'HIGH', 'LOW', or 'LOW_
        ↪PREEMPT'
    }

    start = str(datetime.datetime.now())
    end = str(datetime.datetime.now() + datetime.timedelta(minutes=1))

    msg = [
        ['campus/building/unit', start, end]
    ]
    self.vip.pubsub.publish(
        'pubsub', topics.ACTUATOR_SCHEDULE_REQUEST, headers, msg)
```

The agent listens to schedule announcements from the actuator and then issues a command:

```
@PubSub.subscribe('pubsub', topics.ACTUATOR_SCHEDULE_ANNOUNCE (campus='campus',
                                                                building='building', unit='unit'))
def actuate(self, peer, sender, bus, topic, headers, message):
    print ("response:", topic, headers, message)
    if headers[headers_mod.REQUESTER_ID] != agent_id:
        return
    '''Match the announce for our fake device with our ID
    Then take an action. Note, this command will fail since there is no
    actual device'''
    headers = {
        'requesterID': agent_id,
    }
    self.vip.pubsub.publish(
        'pubsub', topics.ACTUATOR_SET (campus='campus',
                                      building='building', unit='unit',
                                      point='point'),
        headers, 0.0)
```

## Simple Web Agent Walk-through

A simple web enabled agent that will hook up with a VOLTTRON message bus and allow interaction between it via HTTP. This example agent shows a simple file serving agent, a JSON-RPC based call, and a websocket based connection mechanism.

## Starting VOLTTRON Platform

---

**Note:** Starting the VOLTTRON platform requires an *Activated Environment*. Run the following command from the root directory:

```
. env/bin/activate
```

---

In order to start the simple web agent, we need to bind the VOLTTRON instance to the a web server. We need to specify the address and the port for the web server. For example, if we want to bind the *localhost:8080* as the web server we start the VOLTTRON platform as follows:

```
./start-volttron --bind-web-address http://127.0.0.1:8080
```

---

Once the platform is started, we are ready to run the Simple Web Agent.

## Running Simple Web Agent

---

**Note:** The following assumes the shell is located at the *VOLTTRON\_ROOT*.

---

Copy the following into your shell (save it to a file for executing it again later):

```
python scripts/install-agent.py \  
  --agent-source examples/SimpleWebAgent \  
  --tag simpleWebAgent \  
  --vip-identity webagent \  
  --force \  
  --start
```

---

This will create a web server on `http://localhost:8080`. The *index.html* file under *simpleweb/webroot/simpleweb/* can be any HTML page which binds to the VOLTTRON message bus. This provides a simple example of providing a web endpoint in VOLTTRON.

## Path based registration examples

- Files will need to be in *webroot/simpleweb* in order for them to be browsed from `http://localhost:8080/simpleweb/index.html`
- Filename is required as we don't currently auto-redirect to any default pages as shown in `self.vip.web.register_path("/simpleweb", os.path.join(WEBROOT))`

The following two examples show the way to call either a JSON-RPC (default) endpoint and one that returns a different content-type. With the JSON-RPC example from volttron central we only allow post requests, however this is not required.

- Endpoint will be available at `http://localhost:8080/simple/text` `self.vip.web.register_endpoint("/simple/text", self.text)`
- Endpoint will be available at `http://localhost:8080/simple/jsonrpc` `self.vip.web.register_endpoint("/simpleweb/jsonrpc", self.rpcendpoint)`
- `text/html` content type specified so the browser can act appropriately like `[("Content-Type", "text/html")]`
- The default response is `application/json` so our endpoint returns appropriately with a JSON based response.

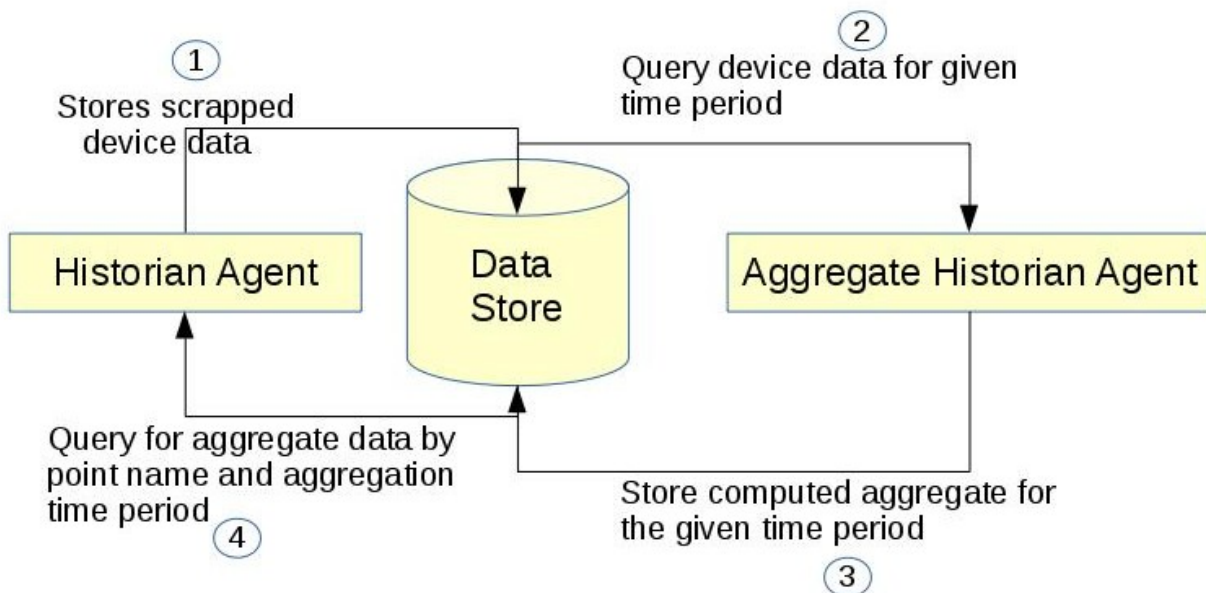
## Agent Specifications

Documents included below are intended to provide a specification to classes of agents which include a base class in the VOLTRON repository and have a well defined set of functions and services.

### Aggregate Historian

#### Description

An aggregate historian computes aggregates of data stored in a given volttron historian's data store. It runs periodically to compute aggregate data and store it in new tables/collections in the historian's data store. Each regular historian ([BaseHistorian](#)) needs a corresponding aggregate historian to compute and store aggregates of the data collected by the regular historian.



## Software Interfaces

**Data Collection** - Data store that the aggregate historian uses as input source needs to be up. Access to it should be provided using an account that has create, read, and write privileges. For example, a MongoAggregateHistorian needs to be able to connect to the mongodb used by MongoHistorian using an account that has read and write access to the db used by the MongoHistorian.

**Data retrieval** Aggregate Historian Agent does not provide api for retrieving the aggregate data collected. Use Historian agent's query interface. Historian's query api will be modified as below

1. topic\_name can now be a list of topic names or a single topic
2. Two near optional parameters have been added to the query api - agg\_type (aggregation type), agg\_period (aggregation time period). Both these parameters are mandatory for query aggregate data.
3. New api to get the list of aggregate topics available for querying

## User Interfaces

Aggregation agent requires user to configure the following details as part of the agent configuration file

1. Connection details for historian's data store (same as historian agent configuration)
2. **List of aggregation groups where each group contains:**
  1. Aggregation period - integer followed by m/h/d/w/M (minutes, hours, days, weeks or months)
  2. Boolean parameter to indicate if aggregation periods should align to calendar times
  3. Optional collection start time in utc. If not provided, aggregation collection will start from current time
  4. List of aggregation points with topic name, type of aggregation (sum, avg, etc.), and minimum number of records that should be available for the aggregate to be computed
  5. Topic name can be specified either as a list of specific topic names (topic\_names=[topic1, topic2]) or a regular expression pattern (topic\_name\_pattern="Building1/device\_\*/Zone\*temperature")
  6. When aggregation is done for a single topic then name of topic will be used for the computed aggregation as well. You could optionally provide a unique aggregation\_topic\_name
  7. When topic\_name\_pattern or multiple topics are specified a unique aggregate topic name should be specified for the collected aggregate. Users can query for the collected aggregate data using this aggregate topic name.
  8. User should be able to configure multiple aggregations done with the same time period/time interval and these should be time synchronized.

## Functional Capabilities

1. Should run periodically to compute aggregate data.
2. Same instance of the agent should be able to collect data at more than one time interval
3. For each configured time period/interval agent should be able to collect different type of aggregation for different topics/points
4. Support aggregation over multiple topics/points
5. Agent should be able to handle and normalize different time units such as minutes, hours, days, weeks and months



6. Agent should be able to compute aggregate both based on wall clock based time intervals and calendar based time interval. For example, agent should be able to calculate daily average based on 12.00AM to 11.59PM of a calendar day or between current time and the same time the previous day.
7. Data should be stored in such a way that users can easily retrieve multiple aggregate topics data within a given time interval

## Data Structure

Collected aggregate data should be stored in the historian data store into new collection or tables and should be accessible by historian agent's query interface. Users should easily be able to query aggregate data of multiple points for which data is time synchronized.

## Use Cases

### Collect monthly average of multiple topic using data from MongoDBHistorian

1. Create a configuration file with connection details from Mongo Historian configuration file and add additional aggregation specific configuration

```
{
  # configuration from mongo historian - START
  "connection": {
    "type": "mongodb",
    "params": {
      "host": "localhost",
      "port": 27017,
      "database": "mongo_test",
      "user": "test",
      "passwd": "test"
    }
  },
  # configuration from mongo historian - START
  "aggregations": [
    # list of aggregation groups each with unique aggregation_period and
    # list of points that needs to be collected
    {
      "aggregation_period": "1M",
      "use_calendar_time_periods": true,
      "utc_collection_start_time": "2016-03-01T01:15:01.000000",
      "points": [
        {
          "topic_names": ["Building/device/point1", "Building/device/point2"],
          "aggregation_topic_name": "building/device/point1_2/month_sum",
          "aggregation_type": "avg",
          "min_count": 2
        }
      ]
    }
  ]
}
```

In the above example configuration, here is what each field under “aggregations” represent

- **aggregation\_period**: can be minutes(m), hours(h), weeks(w), or months(M)

- **use\_calendar\_time\_periods:** true or false - Should aggregation period align to calendar time periods. Default False. Exam

- if “aggregation\_period”:”1h” and “use\_calendar\_time\_periods”: false, example periods: 10.15-11.15, 11.15-12.15, 12.15-13.15 etc.
- if “aggregation\_period”:”1h” and “use\_calendar\_time\_periods”: true, example periods: 10.00-11.00, 11.00-12.00, 12.00-13.00 etc.
- if “aggregation\_period”:”1M” and “use\_calendar\_time\_periods”: true, aggregation would be computed from the first day of the month to last day of the month
- if “aggregation\_period”:”1M” and “use\_calendar\_time\_periods”: false, aggregation would be computed with a 30 day interval based on aggregation collection start time

- **utc\_collection\_start\_time:** The time from which aggregation computation should start. If not provided this would default to current time.

- **points:** List of points, its aggregation type and min\_count **topic\_names:** List of topic\_names across which aggregation should be computed. **aggregation\_topic\_name:** Unique name given for this aggregate. Optional if aggregation is for a single topic. **aggregation\_type:** Type of aggregation to be done. Please see [Constraints and Limitations](#)

**min\_count:** Optional. Minimum number of records that should exist within the configured time period for a aggregation to be computed.

2. install and starts the aggregate historian using the above configuration

3. Query aggregate data: Query using historian’s query api by passing two additional parameters - agg\_type and agg\_period

```
result1 = query_agent.vip.rpc.call('platform.historian',
                                   'query',
                                   topic='building/device/point1_2/month_sum',
                                   agg_type='avg',
                                   agg_period='1M',
                                   count=20,
                                   order="FIRST_TO_LAST").get(10)
```

## Collect weekly average(sunday to saturday) of single topic using data from MongoDBHistorian

1. Create a configuration file with connection details from Mongo Historian configuration file and add additional aggregation

- **aggregation\_period:** “1w”,
- **topic\_names:** [“Building/device/point1”], #topic for which you want to compute aggregation
- **aggregation\_topic\_name** need not be provided

2. install and starts the aggregate historian using the above configuration

3. Query aggregate data: Query using historian’s query api by passing two additional parameters - agg\_type and agg\_period. topic\_name will be the same as the point name for which aggregation is collected

```
result1 = query_agent.vip.rpc.call('platform.historian',
                                   'query',
                                   topic='Building/device/point1',
                                   agg_type='avg',
                                   agg_period='1w',
```

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```
count=20,
order="FIRST_TO_LAST").get(10)
```

## Collect hourly average for multiple topics based on topic\_name pattern

1. Create a configuration file with connection details from Mongo Historian configuration file and add additional aggregation

- **aggregation\_period**: "1h",
- Instead of **topic\_names** provide **topic\_name\_pattern**. For example, **"topic\_name\_pattern": "Building1/device\_a\*/point1"**
- **aggregation\_topic\_name** provide a unique aggregation topic name

2. install and starts the aggregate historian using the above configuration

3. Query aggregate data: Query using historian's query api by passing two additional parameters - **agg\_type** and **agg\_period**. **topic\_name** will be the same as the point name for which aggregation is collected

```
result1 = query_agent.vip.rpc.call('platform.historian',
                                   'query',
                                   topic="unique aggregation_topic_name provided in_
↪configuration",
                                   agg_type='avg',
                                   agg_period='1h',
                                   count=20,
                                   order="FIRST_TO_LAST").get(10)
```

## Collect 7 day average of two topics and time synchronize them for easy comparison

1. Create a configuration file with connection details from Mongo Historian configuration file and add additional aggregation specific configuration. The configuration file should be similar to the below example

```
{
  # configuration from mongo historian - START
  "connection": {
    "type": "mongodb",
    "params": {
      "host": "localhost",
      "port": 27017,
      "database": "mongo_test",
      "user": "test",
      "passwd": "test"
    }
  },
  # configuration from mongo historian - START
  "aggregations": [
    # list of aggregation groups each with unique aggregation_period and
    # list of points that needs to be collected
    {
      "aggregation_period": "1w",
      "use_calendar_time_periods": false, #compute for last 7 days, then the next_
↪and so on..
```

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```

    "points": [
        {
            "topic_names": ["Building/device/point1"],
            "aggregation_type": "avg",
            "min_count": 2
        },
        {
            "topic_names": ["Building/device/point2"],
            "aggregation_type": "avg",
            "min_count": 2
        }
    ]
}

```

2. install and starts the aggregate historian using the above configuration

3. Query aggregate data: Query using historian's query api by passing two additional parameters - `agg_type` and `agg_period`. provide the list of topic names for which aggregate was configured above. Since both the points were configured within a single "aggregations" array element, their aggregations will be time synchronized

```

result1 = query_agent.vip.rpc.call('platform.historian',
                                   'query',
                                   topic=['Building/device/point1' 'Building/device/
↪point2'],
                                   agg_type='avg',
                                   agg_period='1w',
                                   count=20,
                                   order="FIRST_TO_LAST").get(10)

```

Results will be of the format

```

{'values': [
    ['Building/device/point1', '2016-09-06T23:31:27.679910+00:00', 2],
    ['Building/device/point1', '2016-09-15T23:31:27.679910+00:00', 3],
    ['Building/device/point2', '2016-09-06T23:31:27.679910+00:00', 2],
    ['Building/device/point2', '2016-09-15T23:31:27.679910+00:00', 3]],
'metadata': {}}

```

### Query list of aggregate data collected

```

result = query_agent.vip.rpc.call('platform.historian',
                                   'get_aggregate_topics').get(10)

```

The result will be of the format:

```

[(aggregate topic name, aggregation type, aggregation time period, configured list of
↪topics or topic name pattern), ...]

```

This shows the list of aggregation currently being computed periodically

## Query list of supported aggregation types

```
result = query_agent.vip.rpc.call(
    AGG_AGENT_VIP,
    'get_supported_aggregations').get(timeout=10)
```

## Constraints and Limitations

1. Initial implementation of this agent will not support any data filtering for raw data before computing data aggregation
2. Initial implementation should support all aggregation types directly supported by underlying data store. End user input is needed to figure out what additional aggregation methods are to be supported

### MySQL

Name	Description
AVG()	Return the average value of the argument
BIT_AND()	Return bitwise AND
BIT_OR()	Return bitwise OR
BIT_XOR()	Return bitwise XOR
COUNT()	Return a count of the number of rows returned
GROUP_CONCAT()	Return a concatenated string
MAX()	Return the maximum value
MIN()	Return the minimum value
STD()	Return the population standard deviation
STDDEV()	Return the population standard deviation
STDDEV_POP()	Return the population standard deviation
STDDEV_SAMP()	Return the sample standard deviation
SUM()	Return the sum
VAR_POP()	Return the population standard variance
VAR_SAMP()	Return the sample variance
VARIANCE()	Return the population standard variance

### SQLite

Name	Description
AVG()	Return the average value of the argument
COUNT()	Return a count of the number of rows returned
GROUP_CONCAT()	Return a concatenated string
MAX()	Return the maximum value
MIN()	Return the minimum value
SUM()	Return sum of all non-NULL values in the group. If there are no non-NULL input rows then returns NULL .
TOTAL()	Return sum of all non-NULL values in the group.If there are no non-NULL input rows returns 0.0

### MongoDB

Name	Description
SUM	Returns a sum of numerical values. Ignores non-numeric values
AVG	Returns a average of numerical values. Ignores non-numeric values
MAX	Returns the highest expression value for each group.
MIN	Returns the lowest expression value for each group.
FIRST	Returns a value from the first document for each group. Order is only defined if the documents are in a defined order.
LAST	Returns a value from the last document for each group. Order is only defined if the documents are in a defined order.
PUSH	Returns an array of expression values for each group
AD-DTOSET	Returns an array of unique expression values for each group. Order of the array elements is undefined.
STDDE-VPOP	Returns the population standard deviation of the input values
STDDE-VSAMP	Returns the sample standard deviation of the input values

## Tagging Service

### Description

Tagging service provides VOLTTRON users the ability to add semantic tags to different topics so that topic can be queried by tags instead of specific topic name or topic name pattern.

### Taxonomy

VOLLTTRON will use tags from [Project Haystack](#). Tags defined in haystack will be imported into VOLTTRON and grouped by categories to tag topics and topic name prefix.

### Dependency

Once data in VOLTTRON has been tagged, users will be able to query topics based on tags and use the resultant topics to query the historian

### Features

1. User should be able to tag individual components of a topic such as campus, building, device, point etc.
2. Using the tagging service users should only be able to add tags already defined in the volttron tagging schema. New tags should be explicitly added to the tagging schema before it can be used to tag topics or topic prefix
3. Users should be able batch process and tag multiple topic names or topic prefix using a template. At the end of this, users should be notified about the list of topics that did not confirm to the template. This will help users to individually add or edit tags for those specific topics
4. When users query for topics based on a tag, the results would correspond to the current metadata values. It is up to the calling agent/application to periodically query for latest updates if needed.
5. Users should be able query based on tags on a specific topic or its topic prefix/parents
6. Allow for count and skip parameters in queries to restrict count and allow pagination

## API

### 1. Get the list of tag categories available

rpc call to tagging service method **'get\_categories'** with optional parameters:

1. **include\_description** - set to True to return available description for each category. Default = False
2. **skip** - number of categories to skip. this parameter along with count can be used for paginating results
3. **count** - limit the total number of tag categories returned to given count
4. **order** - ASCENDING or DESCENDING. By default, it will be sorted in ascending order

### 2. Get the list of tags for a specific category

rpc call to tagging service method **'get\_tags\_by\_category'** with parameter:

1. **category** - <category name>

and optional parameters:

2. **include\_kind** - indicate if result should include the kind/data type for tags returned. Defaults to False
3. **include\_description** - indicate if result should include available description for tags returned. Defaults to False
4. **skip** - number of tags to skip. this parameter along with count can be used for paginating results
5. **count** - limit the total number of tags returned to given count
6. **order** - ASCENDING or DESCENDING. By default, it will be sorted in ascending order

### 3. Get the list of tags for a topic\_name or topic\_name\_prefix

rpc call to tagging service method **get\_tags\_by\_topic**

**with parameter**

1. **topic\_prefix** - topic name or topic name prefix

and optional parameters:

2. **include\_kind** - indicate if result should include the kind/data type for tags returned. Defaults to False
3. **include\_description** - indicate if result should include available description for tags returned. Defaults to False
4. **skip** - number of tags to skip. this parameter along with count can be used for paginating results
5. **count** - limit the total number of tags returned to given count
6. **order** - ASCENDING or DESCENDING. By default, it will be sorted in ascending order

## 4. Find topic names by tags

rpc call to tagging service method **'get\_topics\_by\_tags'** with the one or more of the following parameters

1. **and\_condition** - dictionary of tag and its corresponding values that should be matched using equality operator or a list of tags that should exist/be true. Tag conditions are combined with AND condition. Only topics that match all the tags in the list would be returned
2. **or\_condition** - dictionary of tag and its corresponding values that should be matched using equality operator or a list of tags that should exist/be true. Tag conditions are combined with OR condition. Topics that match any of the tags in the list would be returned. If both **and\_condition** and **or\_condition** are provided then they are combined using AND operator.
3. **condition** - conditional statement to be used for matching tags. If this parameter is provided the above two parameters are ignored. The value for this parameter should be an expression that contains one or more query conditions combined together with an "AND" or "OR". Query conditions can be grouped together using parenthesis. Each condition in the expression should conform to one of the following format:

1. <tag name/ parent.tag\_name> <binary\_operator> <value>
2. <tag name/ parent.tag\_name>
3. <tag name/ parent.tag\_name> LIKE <regular expression within single quotes>
4. the word NOT can be prefixed before any of the above three to negate the condition.
5. expressions can be grouped with parenthesis.

For example

```
condition="tag1 = 1 and not (tag2 < ' ' and tag2 > ' ') and tag3_
↪and NOT tag4 LIKE '^a.*b$'"
condition="NOT (tag5='US' OR tag5='UK') AND NOT tag3 AND NOT_
↪(tag4 LIKE 'a.*') "
condition="campusRef.geoPostalCode='20500' and equip and boiler"
```

6. **skip** - number of topics to skip. this parameter along with count can be used for paginating results
7. **count** - limit the total number of tag topics returned to given count
8. **order** - ASCENDING or DESCENDING. By default, it will be sorted in ascending order

## 5. Query data based on tags

Use above api to get topics by tags and then use the result to query historian's query api.

## 6. Add tags to specific topic name or topic name prefix

rpc call to tagging service method **'add\_topic\_tags'** with parameters:

1. **topic\_prefix** - topic name or topic name prefix
2. **tags** - {<valid tag>:value, <valid\_tag>: value,... }
3. **update\_version** - True/False. Default to False. If set to True and if any of the tags update an existing tag value the older value would be preserved as part of tag version history. **NOTE:** This is a placeholder. Current version does not support versioning.



## 7. Add tags to multiple topics

rpc call to to tagging service method **'add\_tags'** with parameters:

1. **tags** - dictionary object containing the topic and the tag details. format:

```
<topic_name or prefix or topic_name pattern>: {<valid tag>:<value>, ... }, ... }
```

2. **update\_version** - True/False. Default to False. If set to True and if any of the tags update an existing tag value the older value would be preserved as part of tag version history

### Use case examples

#### 1. Loading news tags for an existing VOLTTRON instance

Current topic names:

```
/campus1/building1/deviceA1/point1
/campus1/building1/deviceA1/point2
/campus1/building1/deviceA1/point3
/campus1/building1/deviceA2/point1
/campus1/building1/deviceA2/point2
/campus1/building1/deviceA2/point3
/campus1/building1/deviceB1/point1
/campus1/building1/deviceB1/point2
/campus1/building1/deviceB2/point1
/campus1/building1/deviceB1/point2
```

#### Step 1:

Create a python dictionary object contains topic name pattern and its corresponding tag/value pair. Use topic pattern names to fill out tags that can be applied to more than one topic or topic prefix. Use specific topic name and topic prefix for tags that apply only to a single entity. For example:

```
{
# tags specific to building1
'/campus1/building1':
{
'site': true,
'dis': ": 'some building description'",
'yearBuilt': 2015,
'area': '24000sqft'
},
# tags that apply to all device of a specific type
'/campus1/building1/deviceA*':
{
'dis': "building1 chilled water system - CHW",
'equip': true,
'campusRef': 'campus1',
'siteRef': 'campus1/building1',
```

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```
'chilled': true,
'water' : true,
'secondaryLoop': true
}
# tags that apply to point1 of all device of a specific type
'/campus1/building1/deviceA*/point1':
{
  'dis': "building1 chilled water system - point1",
  'point': true,
  'kind': 'Bool',
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1'
}
# tags that apply to point2 of all device of a specific type
'/campus1/building1/deviceA*/point2':
{
  'dis': "building1 chilled water system - point2",
  'point': true,
  'kind': 'Number',
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1'
}
# tags that apply to point3 of all device of a specific type
'/campus1/building1/deviceA*/point3':
{
  'dis': "building1 chilled water system - point3",
  'point': true,
  'kind': 'Number',
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1'
}
# tags that apply to all device of a specific type
'/campus1/building1/deviceB*':
{
  'dis': "building1 device of type B",
  'equip': true,
  'chilled': true,
  'water' : true,
  'secondaryLoop': true,
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1'
}
# tags that apply to point1 of all device of a specific type
'/campus1/building1/deviceB*/point1':
{
  'dis': "building1 device B - point1",
  'point': true,
  'kind': 'Bool',
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1',
  'command': true
}
# tags that apply to point1 of all device of a specific type
'/campus1/building1/deviceB*/point2':
{
  'dis': "building1 device B - point2",
  'point': true,
```

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```

'kind': 'Number',
'campusRef': 'campus1',
'siteRef': 'campus1/building1'
}

```

## Step 2: Create tags using template above

Make an RPC call to the `add_tags` method and pass the python dictionary object

## Step 3: Create tags specific to a point or device

Any tags that were not included in step one and needs to be added later can be added using the rpc call to tagging service either the method **'add\_topic\_tags'** **'add\_tags'**

For example:

```

agent.vip.rpc.call(
    'platform.tagging',
    'add_topic_tags',
    topic_prefix='/campus1/building1/deviceA1',
    tags={'tag1': 'value'})

```

```

agent.vip.rpc.call(
    'platform.tagging',
    'add_topic_tags',
    tags={
        '/campus1/building1/deviceA2':
            {'tag1': 'value'},
        '/campus1/building1/deviceA2/point1':
            {'equipRef': 'campus1/building1/deviceA2'}
    })

```

## 2. Querying based on a topic's tag and it parent's tags

Query - Find all points that has the tag 'command' and belong to a device/unit that has a tag 'chilled'

```

agent.vip.rpc.call(
    'platform.tagging',
    'get_topics_by_tags',
    condition='temperature and equip.chilled')

```

In the above code block 'command' and 'chilled' are the tag names that would be searched, but since the tag 'chilled' is prefixed with 'equip.' the tag in a parent topic

The above query would match the topic '/campus1/building1/deviceB1/point1' if tags in the system are as follows  
'/campus1/building1/deviceB1/point1' tags:

```
{
  'dis': "building1 device B - point1",
  'point': true,
  'kind': 'Bool',
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1',
  'equipRef': 'campus1/building1/deviceB1',
  'command': true
}
```

‘/campus1/building1/deviceB1’ tags

```
{
  'dis': "building1 device of type B",
  'equip': true,
  'chilled': true,
  'water' : true,
  'secondaryLoop': true,
  'campusRef': 'campus1',
  'siteRef': 'campus1/building1'
}
```

## Possible future improvements

1. Versioning - When a value of a tag is changed, users should be prompted to verify if this change denotes a new version or a value correction. If this value denotes a new version, then older value of the tag should be preserved in a history/audit store
2. Validation of tag values based on data type
3. Support for units validation and conversions
4. Processing and saving geologic coordinates that can enable users to do geo-spatial queries in databases that support it.

## Weather Service

### Description

The weather service agent provides API to access current weather data, historical data and weather forecast data. There are several weather data providers, some paid and some free. Weather data providers differ from one another

1. In the kind of features provided - current data, historical data, forecast data
2. The data points returned
3. The naming schema used to represent the data returned
4. Units of data returned
5. Frequency of data updates

The weather service agent has a design similar to historians. There is a single base weather service that defines the api signatures and the ontology of the weather data points. There is one concrete weather service agent for each weather provider. Users can install one or more provider specific agent to access weather data.

The initial implementation is for [NOAA](#) and would support current and forecast data requests. NOAA does not support accessing historical weather data through their api. This agent implements request data caching.

The second implementation is for [darksky.net](#).

## Features

### Base weather agent features:

1. Caching

The weather service provides basic caching capability so that repeated request for same data can be returned from cache instead of network round trip to the weather data provider. This is also useful to limit the number of request made to the provider as most weather data provider have restrictions on number of requests for developer/free api keys. The size of the cache can be restricted by setting an optional configuration parameter 'max\_size\_gb'

2. Name mapping

Data points returned by concrete weather agents is mapped to standard names based on [CF standard names table](#) Name mapping is done using a CSV file. See [Configuration](#) section for an example configuration

3. Unit conversion

If data returned from the provider is of the format {"data\_point\_name":value}, base weather agent can do unit conversions on the value. Both name mapping and unit conversions can be specified as a csv file and packaged with the concrete implementing agent. This feature is not mandatory. See [Configuration](#) section for an example configuration

Core weather data retrieval features :

1. Retrieve current weather data.
2. Retrieve hourly weather forecast data.
3. Retrieve historical weather data.
4. Periodic polling of current weather data for one or more locations. Users can configure one or more locations in a config file and weather agent will periodically poll for current weather data for the configured locations and publish the results to message bus.

The set of points returned from the above queries depends on the specific weather data provider, however the point names returned are from the standard schema.

Note:

1. Since individual weather data provider can support slightly different sets of features, users are able to query for the list of available features. For example a provider could provide daily weather forecast in addition to the hourly forecast data.

## API

### 1. Get available features

rpc call to weather service method **'get\_api\_features'**

Parameters - None

Returns - dictionary of api features that can be called for this weather agent.

### 2. Get current weather data

rpc call to weather service method **'get\_current\_weather'**

Parameters:

1. **locations** - dictionary containing location details. The format of location accepted differs between different weather providers and even different APIs supported by the same provider For example the location input could be either {"zipcode":value} or {"region":value, "country": value}.

**Returns:** List of dictionary objects containing current weather data. The actual data points returned depends on the weather service provider.

### 3. Get hourly forecast data

rpc call to weather service method **'get\_hourly\_forecast'**

Parameters:

1. **locations** - dictionary containing location details. The format of location accepted differs between different weather providers and even different APIs supported by the same provider For example the location input could be either {"zipcode":value} or {"region":value, "country": value}.

optional parameters:

2. **hours** - The number of hours for which forecast data are returned. By default, it is 24 hours.

**Returns:** List of dictionary objects containing forecast data. If weather data provider returns less than requested number of hours result returned would contain a warning message in addition to the result returned by the provider

### 4. Get historical weather data

rpc call to weather service method **'get\_hourly\_historical'**

Parameters:

1. **locations** - dictionary containing location details. For example the location input could be either {"zip-code":value} or {"region":value, "country": value}.
2. **start\_date** - start date of requested data
3. **end\_date** - end date of requested data

**Returns:** List of dictionary objects containing historical data.

---

**Note:** Based on the weather data provider this api could do multiple calls to the data provider to get the requested data. For example, darksky.net allows history data query by a single date and not a date range.

---

## 5. Periodic polling of current weather data

This can be achieved by configuring the locations for which data is requested in the agent's configuration file along with polling interval. Results for each location configured, is published to its corresponding result topic. If no result topic prefix is configured, then results for all locations are posted to the topic `weather/poll/current/all`. `poll_topic_suffixes` when provided should be a list of string with the same length as the number of `poll_locations`. When topic prefix is specified, each location's result is published to `weather/poll/current/<poll_topic_suffix for that location> topic_prefix`.

### Configuration

Example configuration:

```
{
  poll_locations: [
    {"zip": "22212"},
    {"zip": "99353"}
  ],
  poll_topic_suffixes: ["result_22212", "result_99353"],
  poll_interval: 20 #seconds,

  #optional cache arguments
  max_cache_size: ...
}
```

Example configuration for mapping point names returned by weather provider to a standard name and units:

```
Service_Point_Name,Standard_Point_Name,Service_Units,Standard_Units
temperature,air_temperature,fahrenheit,celsius
```

### Caching

Weather agent will cache data until the configured size limit is reached (if provided).

1. Current and forecast data:

If current/forecast weather data exists in cache and if the request time is within the update time period of the api (specified by a concrete implementation) then by default cached data would be returned otherwise a new request is made for it. If hours is provided and the amount of cached data records is less than hours, this will also result in a new request.

2. Historical data cache:

Weather api will query the cache for available data for the given time period and fill and missing time period with data from the remote provider.

3. Clearing of cache:

Users can configure the maximum size limit for cache. For each api call, before data is inserted in cache, weather agent will check for this size limit and purge records in this order. - Current data older than update time period  
- Forecast data older than update time period - History data starting with the oldest cached data

## Assumptions

1. User has api key for accessing weather api for a specific weather data provider, if a key is required.
2. Different weather agent might have different requirement for how input locations are specified. For example NOAA expects a station id for querying current weather and requires either a lat/long or gridpoints to query for forecast. weatherbit.io accepts zip code.
3. Not all features might be implemented by a specific weather agent. For example NOAA doesn't make history data available using their weather api.
4. Concrete agents could expose additional api features
5. Optionally, data returned will be based on standard names provided by the CF standard names table (see Ontology). Any points with a name not mapped to a standard name would be returned as is.

## Using Asyncio in Agents

The purpose of this section to is to show how to use Asyncio with Gevent within the Agent development framework.

Before we dive into the example, we establish the following concepts:

- An Event Loop is a software design pattern that handles events concurrently; it waits for and dispatches multiple events concurrently and gives the illusion of executing the events in “parallel”. In Python, the `Event Loop` contains a list of Tasks which controls when and how those Tasks are executed.
- A `Task` is an object that runs a `coroutine` (i.e. asynchronous function). In Python, coroutines are written using the ‘`async`’ keyword.
- A `Greenlet` is a “lightweight coroutine for in-process sequential concurrent programming. Greenlets can be used on their own, but they are frequently used with frameworks such as gevent to provide higher-level abstractions and asynchronous I/O.
- Asyncio is a built-in Python module that allows the developer to write concurrent code.
- Gevent is a “coroutine-based Python networking library that uses greenlet to provide a high-level synchronous API on top of the libev or libuv event loop”.
- VOLTRON predates the inclusion of asyncio in python and therefore uses gevent for its base.

The general steps to use Asyncio within the Volttron Agent framework are the following:

1. Create an async method.
2. Create a method which creates and starts the Asyncio Event Loop.
3. Use `gevent.spawn` (or `spawn_later`) to start a greenlet using the method in step 2.

Below are code examples of how to implement the steps within an agent. For demonstration purposes, we name this agent, `ExampleAsyncioAgent`.

Step 1: Create an async method.

```
class ExampleAsyncioAgent (Agent) :  
  
    # This is the async method.
```

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```

async def handle_event(self, event):
    ...
    # releases control so other coroutines can run.
    await asyncio.sleep(1)
    return "hello!"

```

Step 2. Create a method which creates and starts the Asyncio Event Loop.

```

class ExampleAsyncioAgent (Agent):

    # This is a wrapper method that is self contained for launching from gevent.
    def _start_asyncio_loop(self):
        loop = asyncio.get_event_loop()
        loop.create_task(self.handle_event)
        loop.run_forever()

```

Step 3. Use `gevent.spawn` (or `spawn_later`) to start a greenlet using the method in step 2.

```

class ExampleAsyncioAgent (Agent):

    @Core.receiver('onstart')
    def onstart(self, sender, **kwargs):

        # Spawn greenlet in 3 seconds, use self._start_asyncio_loop as a callback for
        ↪executing
        # the greenlet
        #
        # Does not have to be in onstart can be in any function, but must be after
        ↪the agent
        # has started up.
        gevent.spawn_later(3, self._start_asyncio_loop)

```

To review, below is the complete agent class with all the relevant and aforementioned codeblocks:

```

import gevent
import asyncio

class ExampleAsyncioAgent (Agent):

    @Core.receiver("onstart")
    def onstart(self, sender, **kwargs):
        gevent.spawn_later(3, self._start_asyncio_loop)

    def _start_asyncio_loop(self):
        loop = asyncio.get_event_loop()
        loop.create_task(self.ven_client.run())
        loop.run_forever()

    async def handle_event(self, event):
        # do things that include a blocking call
        ...

        await asyncio.sleep(1)
        return "hello!"

```

## References

- [Python Asyncio Primer](#)

- [Python Asyncio documentation](#)
- [Gevent documentation](#)

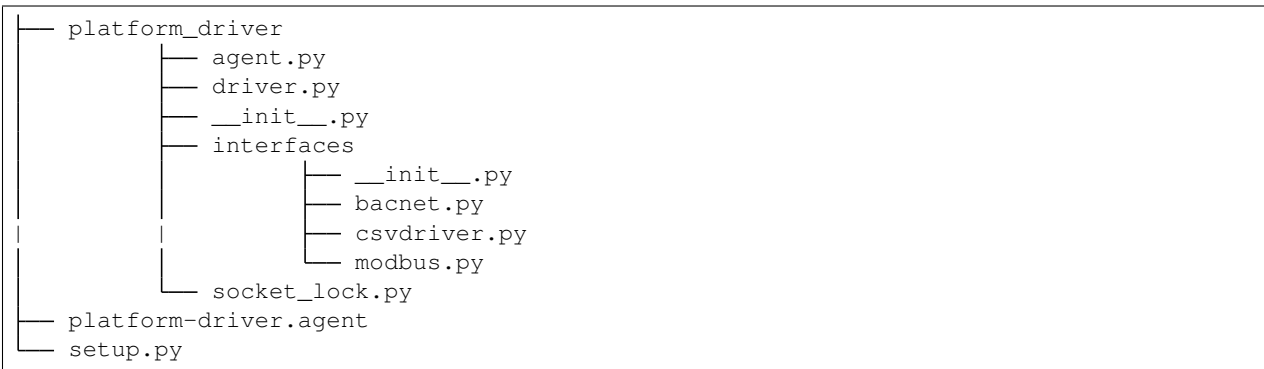
## 2.21 Driver Development

In order for VOLTTRON agents to gather data from a device or to set device values, agents send requests to the Master Driver Agent to read or set points. The Platform Driver Agent then sends these requests on to the appropriate driver for interfacing with that device based on the topic specified in the request and the configuration of the Platform Driver. Drivers provide an interface between the device and the platform driver by implementing portions of the devices' protocols needed to serve the functions of setting and reading points.

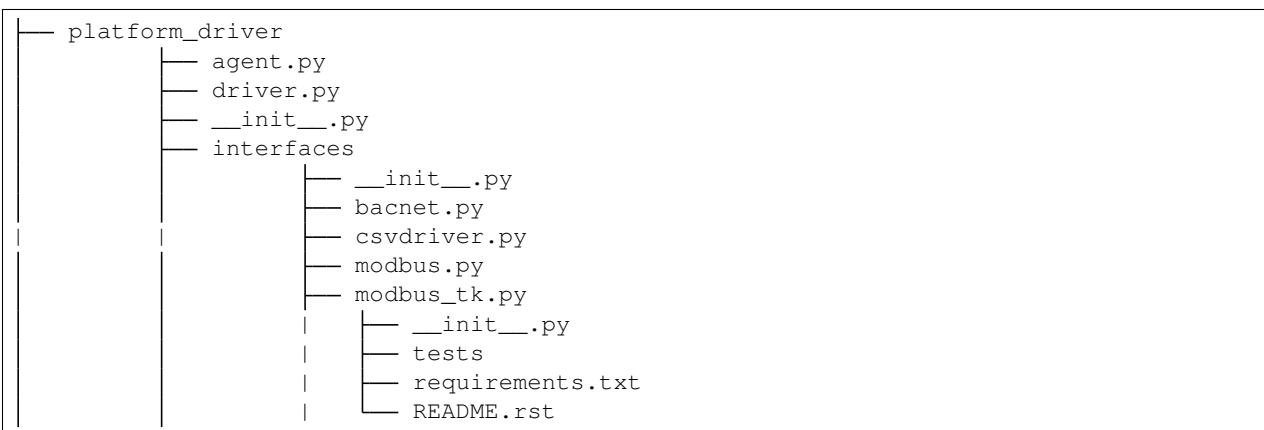
As a demonstration of developing a driver a driver can be made to read and set points in a CSV file. This driver will only differ from a real device driver in terms of the specifics of the protocol.

### 2.21.1 Create a Driver and Register class

When a new driver configuration is added to the Platform Driver, the Platform Driver will look for a file or directory in its interfaces directory (`services/core/PlatformDriverAgent/platform_driver/interfaces`) that shares the name of the value specified by "driver\_type" in the configuration file. For the CSV Driver, create a file named `csvdriver.py` in that directory.



Following is an example using the directory type structure:



---

**Note:** Using this format, the directory must be the name specified by "driver\_type" in the configuration file and the

---

*Interface* class must be in the `__init__.py` file in that directory.

---

This format is ideal for including additional code files as well as requirements files, tests and documentation.

## Interface Basics

A complete interface consists of two parts: the interface class and one or more register classes.

### Interface Class Skeleton

When the Platform Driver processes a driver configuration file it creates an instance of the interface class found in the interface file (such as the one we’ve just created). The interface class is responsible for managing the communication between the Volttron Platform, and the device. Each device has many registers which hold the values Volttron agents are interested in so generally the interface manages reading and writing to and from a device’s registers. At a minimum, the interface class should be configurable, be able to read and write registers, as well as read all registers with a single request. First create the csv interface class boilerplate.

```
class Interface(BasicRevert, BaseInterface):
    def __init__(self, **kwargs):
        super(Interface, self).__init__(**kwargs)

    def configure(self, config_dict, registry_config_str):
        pass

    def get_point(self, point_name):
        pass

    def _set_point(self, point_name, value):
        pass

    def _scrape_all(self):
        pass
```

This class should inherit from the `BaseInterface` and at a minimum implement the `configure`, `get_point`, `set_point`, and `scrape_all` methods.

---

**Note:** In some sense, drivers are sub-agents running under the same process as the Platform Driver. They should be instantiated following the agent pattern, so a function to handle configuration and create the Driver object has been included.

---

### Register Class Skeleton

The interface needs some information specifying the communication for each register on the device. For each different type of register a register class should be defined which will help identify individual registers and determine how to communicate with them. Our CSV driver will be fairly basic, with one kind of “register”, which will be a column in a CSV file. Other drivers may require many kinds of registers; for instance, the Modbus protocol driver has registers which store data in byte sized chunks and registers which store individual bits, therefore the Modbus driver has bit and byte registers.

For the CSV driver, create the register class boilerplate:

```
class CsvRegister(BaseRegister):
    def __init__(self, csv_path, read_only, pointName, units, reg_type,
                  default_value=None, description=''):
        super(CsvRegister, self).__init__("byte", read_only, pointName, units,
        ↪description=description)
```

This class should inherit from the BaseRegister. The class should keep register metadata, and depending upon the requirements of the protocol/device, may perform the communication.

The BACNet and Modbus drivers may be used as examples of more specific implementations. For the purpose of this demonstration writing and reading points will be done in the register, however, this may not always be the case (as in the case of the BACNet driver).

### Filling out the Interface class

The CSV interface will be writing to and reading from a CSV file, so the device configuration should include a path specifying a CSV file to use as the “device”. The CSV “device: path value is set at the beginning of the agent loop which runs the configure method when the Platform Driver starts. Since this Driver is for demonstration, we’ll create the CSV with some default values if the configured path doesn’t exist. The CSV device will consist of 2 columns: “Point Name” specifying the name of the register, and “Point Value”, the current value of the register.

```
_log = logging.getLogger(__name__)

CSV_FIELDNAMES = ["Point Name", "Point Value"]
CSV_DEFAULT = [
    {
        "Point Name": "test1",
        "Point Value": 0
    },
    {
        "Point Name": "test2",
        "Point Value": 1
    },
    {
        "Point Name": "test3",
        "Point Value": "testpoint"
    }
]

type_mapping = {"string": str,
                 "int": int,
                 "integer": int,
                 "float": float,
                 "bool": bool,
                 "boolean": bool}

class Interface(BasicRevert, BaseInterface):
    def __init__(self, **kwargs):
        super(Interface, self).__init__(**kwargs)
        self.csv_path = None

    def configure(self, config_dict, registry_config_str):
        self.csv_path = config_dict.get("csv_path", "csv_device.csv")
        if not os.path.isfile(self.csv_path):
            _log.info("Creating csv 'device'")
            with open(self.csv_path, "w+") as csv_device:
                writer = DictWriter(csv_device, fieldnames=CSV_FIELDNAMES)
```

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```

        writer.writeheader()
        writer.writerows(CSV_DEFAULT)
    self.parse_config(registry_config_str)

```

At the end of the configuration method, the Driver parses the registry configuration. The registry configuration is a csv which is used to tell the Driver which register the user wishes to communicate with and includes a few meta-data values about each register, such as whether the register can be written to, if the register value uses a specific measurement unit, etc. After each register entry is parsed from the registry config a register is added to the driver's list of active registers.

```

def parse_config(self, config_dict):
    if config_dict is None:
        return

    for index, regDef in enumerate(config_dict):
        # Skip lines that have no point name yet
        if not regDef.get('Point Name'):
            continue

        read_only = regDef.get('Writable', "").lower() != 'true'
        point_name = regDef.get('Volttron Point Name')
        if not point_name:
            point_name = regDef.get("Point Name")
        if not point_name:
            raise ValueError("Registry config entry {} did not have a point name or_
↪ volttron point name".format(
                index))
        description = regDef.get('Notes', '')
        units = regDef.get('Units', None)
        default_value = regDef.get("Default Value", "").strip()
        if not default_value:
            default_value = None
        type_name = regDef.get("Type", 'string')
        reg_type = type_mapping.get(type_name, str)

        register = CsvRegister(
            self.csv_path,
            read_only,
            point_name,
            units,
            reg_type,
            default_value=default_value,
            description=description)

        if default_value is not None:
            self.set_default(point_name, register.value)

    self.insert_register(register)

```

Since the driver's registers will be doing the work of parsing the registers the interface only needs to select the correct register to read from or write to and instruct the register to perform the corresponding unit of work.

```

def get_point(self, point_name):
    register = self.get_register_by_name(point_name)
    return register.get_state()

```

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```

def _set_point(self, point_name, value):
    register = self.get_register_by_name(point_name)
    if register.read_only:
        raise IOError("Trying to write to a point configured read only: " + point_
↪name)
    register.set_state(value)
    return register.get_state()

def _scrape_all(self):
    result = {}
    read_registers = self.get_registers_by_type("byte", True)
    write_registers = self.get_registers_by_type("byte", False)
    for register in read_registers + write_registers:
        result[register.point_name] = register.get_state()
    return result

```

## Writing the Register class

The CSV driver's register class is responsible for parsing the CSV, reading the corresponding rows to return the register's current value and writing updated values into the CSV for the register. On a device which communicates via a protocol such as Modbus the same units of work would be done, but using pymodbus to perform the reads and writes. Here, Python's CSV library will be used as our "protocol implementation".

The Register class determines which file to read based on values passed from the Interface class.

```

class CsvRegister(BaseRegister):
    def __init__(self, csv_path, read_only, pointName, units, reg_type,
        default_value=None, description=''):
        super(CsvRegister, self).__init__("byte", read_only, pointName, units,
            description=description)
        self.csv_path = csv_path

```

To find its value the register will read the CSV file, iterate over each row until a row with the point name the same as the register name at which point it extracts the point value, and returns it. The register should be written to handle problems which may occur, such as no correspondingly named row being present in the CSV file.

```

def get_state(self):
    if os.path.isfile(self.csv_path):
        with open(self.csv_path, "r") as csv_device:
            reader = DictReader(csv_device)
            for point in reader:
                if point.get("Point Name") == self.point_name:
                    point_value = point.get("Point Value")
                    if not point_value:
                        raise RuntimeError("Point {} not set on CSV Device".
↪format(self.point_name))
                    else:
                        return point_value
            raise RuntimeError("Point {} not found on CSV Device".format(self.point_name))
    else:
        raise RuntimeError("CSV device at {} does not exist".format(self.csv_path))

```

Likewise to overwrite an existing value, the register will iterate over each row until the point name matches the register name, saving the output as it goes. When it finds the correct row it instead saves the output updated with the new value then continues on. Finally it writes the output back to the csv.

```

def set_state(self, value):
    _log.info("Setting state for {} on CSV Device".format(self.point_name))
    field_names = []
    points = []
    found = False
    with open(self.csv_path, "r") as csv_device:
        reader = DictReader(csv_device)
        field_names = reader.fieldnames
        for point in reader:
            if point["Point Name"] == self.point_name:
                found = True
                point_copy = point
                point_copy["Point Value"] = value
                points.append(point_copy)
            else:
                points.append(point)

    if not found:
        raise RuntimeError("Point {} not found on CSV Device".format(self.point_name))
    else:
        with open(self.csv_path, "w") as csv_device:
            writer = DictWriter(csv_device, fieldnames=field_names)
            writer.writeheader()
            writer.writerows([dict(row) for row in points])
    return self.get_state()

```

At this point we should be able to scrape the CSV device using the Platform Driver and set points using the actuator.

## Creating Driver Configurations

The configuration files for the CSV driver are very simple, but in general, the device configuration should specify the parameters which the interface requires to communicate with the device and the registry configuration contains rows which correspond to registers and specifies their usage.

Here's the driver configuration for the CSV driver:

```

{
    "driver_config": {"csv_path": "csv_driver.csv"},
    "driver_type": "csvdriver",
    "registry_config": "config://csv_registers.csv",
    "interval": 30,
    "timezone": "UTC"
}

```

**Note:** The “driver\_type” value must match the name of the driver’s python file as this is what the Platform Driver will look for when searching for the correct interface.

And here's the registry configuration:

Volttron Point Name	Point Name	Writable
test1	test1	true
test2	test2	true
test3	test3	true

The BACNet and Modbus driver docs and example configurations can be used to compare these configurations to more complex configurations.

### 2.21.2 Testing your driver

To test the driver's scrape all functionality, one can install a ListenerAgent and Platform Driver with the driver's configurations, and run them. To do so for the CSV driver using the configurations above: activate the Volttron environment start the platform, tail the platform's log file, then try the following:

```
python scripts/install-agent.py -s examples/ListenerAgent
python scripts/install-agent.py -s services/core/PlatformDriverAgent -c services/core/
↳ PlatformDriverAgent/platform-driver.agent
vctl config store platform.driver devices/<campus>/<building>/csv_driver <path to_
↳ driver configuration>
vctl config store platform.driver <registry config path from driver configuration>
↳ <path to registry configuration>
```

---

**Note:** `vctl config list platform.driver` will list device and registry configurations stored for the platform driver and `vctl config delete platform.driver <config in configs list>` can be used to remove a configuration entry - these commands are very useful for debugging

---

After the Platform Driver starts the driver's output should appear in the logs at regular intervals based on the Master Driver's configuration.

Here is some sample CSV driver output:

```
2019-11-15 10:32:00,010 (listeneragent-3.3 22996) listener.agent INFO: Peer: pubsub,
↳ Sender: platform.driver:, Bus:
, Topic: devices/pnnl/isbl/csv_driver/all, Headers: {'Date': '2019-11-15T18:32:00.
↳ 001360+00:00', 'TimeStamp':
'2019-11-15T18:32:00.001360+00:00', 'SynchronizedTimeStamp': '2019-11-15T18:32:00.
↳ 000000+00:00',
'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
[{'test1': '0', 'test2': '1', 'test3': 'testpoint'},
{'test1': {'type': 'integer', 'tz': 'UTC', 'units': None},
'test2': {'type': 'integer', 'tz': 'UTC', 'units': None},
'test3': {'type': 'integer', 'tz': 'UTC', 'units': None}}]
```

This output is an indication of the basic scrape all functionality working in the Interface class - in our implementation this is also an indication of the basic functionality of the Interface class “get\_point” method and Register class “get\_state” methods working (although edge cases should still be tested!).

To test the Interface's “set\_point” method and Register's “set\_state” method we'll need to use the Actuator agent. The following agent code can be used to alternate a point's value on a schedule using the actuator, as well as perform an action based on a pubsub subscription to a single point:

```
def CsvDriverAgent(config_path, **kwargs):
    """Parses the Agent configuration and returns an instance of
    the agent created using that configuration.

    :param config_path: Path to a configuration file.

    :type config_path: str
    :returns: Csvdriveragent
    :rtype: Csvdriveragent
```

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```

"""
_log.debug("Config path: {}".format(config_path))
try:
    config = utils.load_config(config_path)
except Exception:
    config = {}

if not config:
    _log.info("Using Agent defaults for starting configuration.")
_log.debug("config_dict before init: {}".format(config))
utils.update_kwargs_with_config(kwargs, config)
return Csvdriveragent(**kwargs)

class Csvdriveragent(Agent):
    """
    Document agent constructor here.
    """

    def __init__(self, csv_topic="", **kwargs):
        super(Csvdriveragent, self).__init__(**kwargs)
        _log.debug("vip_identity: " + self.core.identity)

        self.agent_id = "csv_actuation_agent"
        self.csv_topic = csv_topic

        self.value = 0
        self.default_config = {
            "csv_topic": self.csv_topic
        }

        # Set a default configuration to ensure that self.configure is called
        ↪ immediately to setup
        # the agent.
        self.vip.config.set_default("config", self.default_config)

        # Hook self.configure up to changes to the configuration file "config".
        self.vip.config.subscribe(self.configure, actions=["NEW", "UPDATE"], pattern=
        ↪ "config")

    def configure(self, config_name, action, contents):
        """
        Called after the Agent has connected to the message bus. If a configuration
        ↪ exists at startup
        this will be called before onstart.

        Is called every time the configuration in the store changes.
        """
        config = self.default_config.copy()
        config.update(contents)

        _log.debug("Configuring Agent")
        _log.debug(config)

        self.csv_topic = config.get("csv_topic", "")

        # Unsubscribe from everything.

```

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```

self.vip.pubsub.unsubscribe("pubsub", None, None)

self.vip.pubsub.subscribe(peer='pubsub',
                           prefix="devices/" + self.csv_topic + "/all",
                           callback=self._handle_publish)

def _handle_publish(self, peer, sender, bus, topic, headers, message):
    _log.info("Device {} Publish: {}".format(self.csv_topic, message))

@Core.receiver("onstart")
def onstart(self, sender, **kwargs):
    """
    This is method is called once the Agent has successfully connected to the_
    ↪platform.
    This is a good place to setup subscriptions if they are not dynamic or
    do any other startup activities that require a connection to the message bus.
    Called after any configurations methods that are called at startup.

    Usually not needed if using the configuration store.
    """
    self.core.periodic(30, self.actuate_point)

def actuate_point(self):
    _now = get_aware_utc_now()
    str_now = format_timestamp(_now)
    _end = _now + td(seconds=10)
    str_end = format_timestamp(_end)
    schedule_request = [[self.csv_topic, str_now, str_end]]
    result = self.vip.rpc.call(
        'platform.actuator', 'request_new_schedule', self.agent_id, 'my_test',
    ↪'HIGH', schedule_request).get(
        timeout=4)
    point_topic = self.csv_topic + "/" + "test1"
    result = self.vip.rpc.call(
        'platform.actuator', 'set_point', self.agent_id, point_topic, self.value).
    ↪get(
        timeout=4)
    self.value = 0 if self.value is 1 else 1

@Core.receiver("onstop")
def onstop(self, sender, **kwargs):
    """
    This method is called when the Agent is about to shutdown, but before it_
    ↪disconnects from
    the message bus.
    """
    pass

def main():
    """Main method called to start the agent."""
    utils.vip_main(CsvDriverAgent,
                   version=__version__)

if __name__ == '__main__':
    # Entry point for script

```

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```
try:
    sys.exit(main())
except KeyboardInterrupt:
    pass
```

While this code runs, since the Actuator is instructing the Interface to set points on the device, the pubsub all publish can be used to check that the values are changing as expected.

## 2.22 Contributing Code

As an open source project VOLTTRON requires input from the community to keep development focused on new and useful features. To that end we are revising our commit process to hopefully allow more contributors to be a part of the community. The following document outlines the process for source code and documentation to be submitted. There are GUI tools that may make this process easier, however this document will focus on what is required from the command line.

The only requirements for contributing are Git (Linux version control software) and your favorite web browser.

---

**Note:** The following guide assumes the user has already created a fork of the core VOLTTRON repository. Please review the [docs](#) if you have not yet created a fork.

---

The only technical requirements for contributing are Git (version control software) and your favorite web browser.

As a part of VOLTTRON joining the Eclipse community, Eclipse requires that all contributors sign the [Eclipse Contributor agreement](#) before making a pull request.

### 2.22.1 Reviewing Changes

Okay, we've written a cool new *foo.py* script to service *bar* in our deployment. Let's make sure our code is up-to-snuff.

#### Code

First, go through the code.

---

**Note:** We on the VOLTTRON team would recommend an internal code review - it can be really hard to catch small mistakes, typos, etc. for code you just finished writing.

---

- Does the code follow best-practices for Python, object-oriented programming, unit and integration testing, etc.?
- Does the code contain any typos and does it follow [Pep8 guidelines](#)?
- Does the code follow the guidelines laid out in the VOLTTRON documentation?

### Docs

Next, Check out the documentation.

- Is it complete?
  - Has an introduction describing purpose
  - Describes configuration including all parameters
  - Includes installation instructions
  - Describes behavior at runtime
  - Describes all available endpoints (JSON-RPC, pub/sub messages, Web-API endpoints, etc.)
- Does it follow the *VOLTTRON documentation guidelines*?

### Tests

You've included tests, right? Unit and integration tests show users that *foo.py* is better than their wildest dreams - all of the features work, and include components they hadn't even considered themselves!

- Are the unit tests thorough?
  - Success and failure cases
  - Tests for each independent component of the code
- Do the integration tests capture behavior with a running VOLTTRON platform?
  - Success and Failure cases
  - Tests for each endpoint
  - Tests for interacting with other agents if necessary
  - Are status, health, etc. updating as expected when things go wrong or the code recovers?
- Can the tests be read to describe the behavior of the code?

### Structure

For agents and drivers, the VOLTTRON team has some really simple structure recommendations. These make your project structure nice and tidy, and integrate nicely with the core repository.

For agents:

```
TestAgent/  
├── setup.py  
├── config  
├── README.rst  
├── tester  
│   ├── agent.py  
│   └── __init__.py  
└── tests  
    └── test_agent.py
```

For drivers, the interface should be a file named after the driver in the Platform Driver's interfaces directory:

```

├── platform_driver
│   ├── agent.py
│   ├── driver.py
│   ├── __init__.py
│   └── interfaces
│       ├── __init__.py
│       ├── bacnet.py
│       ├── csvdriver.py
│       └── new_driver.py

```

Or in the `__init__.py` file in a directory named after the driver in the Platform Driver's interfaces directory:

```

├── platform_driver
│   ├── agent.py
│   ├── driver.py
│   ├── __init__.py
│   └── interfaces
│       ├── __init__.py
│       ├── bacnet.py
│       └── new_driver
│           └── __init__.py

```

This option is ideal for adding additional code files, and including documentation and tests.

### 2.22.2 Creating a Pull Request to the main VOLTTTRON repository

After reviewing changes to our fork of the VOLTTTRON repository, we want our changes to be added into the main VOLTTTRON repository. After all, our *foo.py* can cure a lot of the world's problems and of course it is always good to have a copyright with the correct year. Open your browser to [https://github.com/VOLTTTRON/voltttron/compare/develop...YOUR\\_USERNAME:develop](https://github.com/VOLTTTRON/voltttron/compare/develop...YOUR_USERNAME:develop).

On that page the base fork should always be VOLTTTRON/voltttron with the base develop, the head fork should be <YOUR USERNAME>/voltttron and the compare should be the branch in your repository to pull from. Once you have verified that you have got the right changes made then, click on create pull request, enter a title and description that represent your changes and submit the pull request.

The VOLTTTRON repository has a description template to use to format your PR:

```

# Description

Please include a summary of the change and which issue is fixed. Please also include,
↪relevant motivation and context. List any dependencies that are required for this,
↪change.

Fixes # (issue)

## Type of change

Please delete options that are not relevant.

- [ ] Bug fix (non-breaking change which fixes an issue)
- [ ] New feature (non-breaking change which adds functionality)
- [ ] Breaking change (fix or feature that would cause existing functionality to not,
↪work as expected)
- [ ] This change requires a documentation update

```

(continues on next page)

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```
# How Has This Been Tested?

Please describe the tests that you ran to verify your changes. Provide instructions,
↳so we can reproduce. Please also list any relevant details for your test,
↳configuration

- [ ] Test A
- [ ] Test B

**Test Configuration**:
* Firmware version:
* Hardware:
* Toolchain:
* SDK:

# Checklist:

- [ ] My code follows the style guidelines of this project
- [ ] I have performed a self-review of my own code
- [ ] I have commented my code, particularly in hard-to-understand areas
- [ ] I have made corresponding changes to the documentation
- [ ] My changes generate no new warnings
- [ ] I have added tests that prove my fix is effective or that my feature works
- [ ] New and existing unit tests pass locally with my changes
- [ ] Any dependent changes have been merged and published in downstream modules
```

---

**Note:** The VOLTTRON repository includes a stub for completing your pull request. Please follow the stub to facilitate the reviewing and merging processes.

---

### 2.22.3 What happens next?

Once you create a pull request, one or more VOLTTRON team members will review your changes and either accept them as is ask for modifications in order to have your commits accepted. Typical response time is approximately two weeks; please be patient, your pull request will be reviewed. You will be automatically emailed through the GitHub notification system when this occurs (assuming you haven't changed your GitHub preferences).

#### Merging changes from the main VOLTTRON repository

As time goes on the VOLTTRON code base will continually be modified so the next time you want to work on a change to your files the odds are your local and remote repository will be out of date. In order to get your remote VOLTTRON repository up to date with the main VOLTTRON repository you could simply do a pull request to your remote repository from the main repository. To do so, navigate your browser to [https://github.com/YOUR\\_USERNAME/volttron/compare/develop...VOLTTRON:develop](https://github.com/YOUR_USERNAME/volttron/compare/develop...VOLTTRON:develop).

Click the 'Create Pull Request' button. On the following page click the 'Create Pull Request' button. On the next page click 'Merge Pull Request' button.

Once your remote is updated you can now pull from your remote repository into your local repository through the following command:

```
git pull
```

The other way to get the changes into your remote repository is to first update your local repository with the changes from the main VOLTTTRON repository and then pushing those changes up to your remote repository. To do that you need to first create a second remote entry to go along with the origin. A remote is simply a pointer to the url of a different repository than the current one. Type the following command to create a new remote called 'upstream':

```
git remote add upstream https://github.com/VOLTTTRON/volttron
```

To update your local repository from the main VOLTTTRON repository then execute the following command where upstream is the remote and develop is the branch to pull from:

```
git pull upstream develop
```

Finally to get the changes into your remote repository you can execute:

```
git push origin
```

### Other commands to know

At this point in time you should have enough information to be able to update both your local and remote repository and create pull requests in order to get your changes into the main VOLTTTRON repository. The following commands are other commands to give you more information that the preceding tutorial went through

### Viewing what the remotes are in our local repository

```
git remote -v
```

### Stashing changed files so that you can do a merge/pull from a remote

```
git stash save 'A comment to be listed'
```

### Applying the last stashed files to the current repository

```
git stash pop
```

### Finding help about any git command

```
git help  
git help branch  
git help stash  
git help push  
git help merge
```

### Creating a branch from the branch and checking it out

```
git checkout -b newbranchname
```

### Checking out a branch (if not local already will look to the remote to checkout)

```
git checkout branchname
```

### Removing a local branch (cannot be current branch)

```
git branch -D branchname
```

### Determine the current and show all local branches

```
git branch
```

## Using Travis Continuous Integration Tools

The main VOLTTRON repository is hooked into an automated build tool called travis-ci. Your remote repository can be automatically built with the same tool by hooking your account into travis-ci's environment. To do this go to <https://travis-ci.org> and create an account. You can use your GitHub login directly to this service. Then you will need to enable the syncing of your repository through the travis-ci service. Finally you need to push a new change to the repository. If the build fails you will receive an email notifying you of that fact and allowing you to modify the source code and then push new changes out.

## 2.23 Contributing Documentation

The Community is encouraged to contribute documentation back to the project as they work through use cases the developers may not have considered or documented. By contributing documentation back, the community can learn from each other and build up a more extensive knowledge base.

VOLTTRON™ documentation utilizes ReadTheDocs: <http://volttron.readthedocs.io/en/develop/> and is built using the Sphinx Python library with static content in Restructured Text.

### 2.23.1 Building the Documentation

Static documentation can be found in the `docs/source` directory. Edit or create new `.rst` files to add new content using the Restructured Text format. To see the results of your changes the documentation can be built locally through the command line using the following instructions:

If you've already *bootstrapped* VOLTTRON™, do the following while activated. If not, this will also pull down the necessary VOLTTRON™ libraries.

```
python bootstrap.py --documentation
cd docs
make html
```



Then, open your browser to the created local files:

```
file:///home/<USER>/git/voltttron/docs/build/html/index.html
```

When complete, changes can be contributed back using the same process as code [contributions](#) by creating a pull request. When the changes are accepted and merged, they will be reflected in the ReadTheDocs site.

## 2.23.2 Documentation Styleguide

### Naming Conventions

- File names and directories should be all lower-case and use only dashes/minus signs (-) as word separators

```
index.rst
├── first-document.rst
├── more-documents
│   └── second-document.rst
```

- Reference Labels should be Capitalized and dash/minus separated:

```
.. _Reference-Label:
```

- Headings and Sub-headings should be written like book titles:

```
=====
The Page Title
=====
```

### Headings

Each page should have a main title:

```
=====
This is the Main Title of the Page
=====
```

It can be useful to include reference labels throughout the document to use to refer back to that section of documentation. Include reference labels above titles and important headings:

```
.. _Main-Title:

=====
This is the main title of the page
=====
```

## Heading Levels

- Page titles and documentation parts should use over-line and underline hashes:

```
=====  
Title  
=====
```

- Chapter headings should be over-lined and underlined with asterisks

```
*****  
Chapter  
*****
```

- For sections, subsections, sub-subsections, etc. underline the heading with the following:
  - =, for sections
  - -, for subsections
  - ^, for sub-subsections
  - “, for paragraphs

In addition to following guidelines for styling, please separate headers from previous content by two newlines.

```
=====  
Title  
=====
```

Content

```
Subheading  
=====
```

## Example Code Blocks

Use bash for commands or user actions:

```
ls -al
```

Use this for the results of a command:

```
total 5277200  
drwxr-xr-x 22 volttron volttron      4096 Oct 20 09:44 .  
drwxr-xr-x 23 volttron volttron      4096 Oct 19 18:39 ..  
-rwxr-xr-x  1 volttron volttron       164 Sep 29 17:08 agent-setup.sh  
drwxr-xr-x  3 volttron volttron      4096 Sep 29 17:13 applications
```

Use this when Python source code is displayed

```
@RPC.export  
def status_agents(self):  
    return self._aip.status_agents()
```

## Directives

**Danger:** Something very bad!

**Tip:** This is something good to know

## Some other directives

“attention”, “caution”, “danger”, “error”, “hint”, “important”, “note”, “tip”, “warning”, “admonition”

## Links

Linking to external sites is simple:

```
Link to `Google` <www.google.com>`_
```

## References

You can reference other sections of documentation using the *ref* directive:

```
This will reference the :ref:`platform installation` <Platform-Installation>
```

## Other resources

- <http://pygments.org/docs/lexers/>
- <http://documentation-style-guide-sphinx.readthedocs.io/en/latest/style-guide.html>
- <http://www.sphinx-doc.org/en/stable/markup/code.html>

## 2.24 Jupyter Notebooks

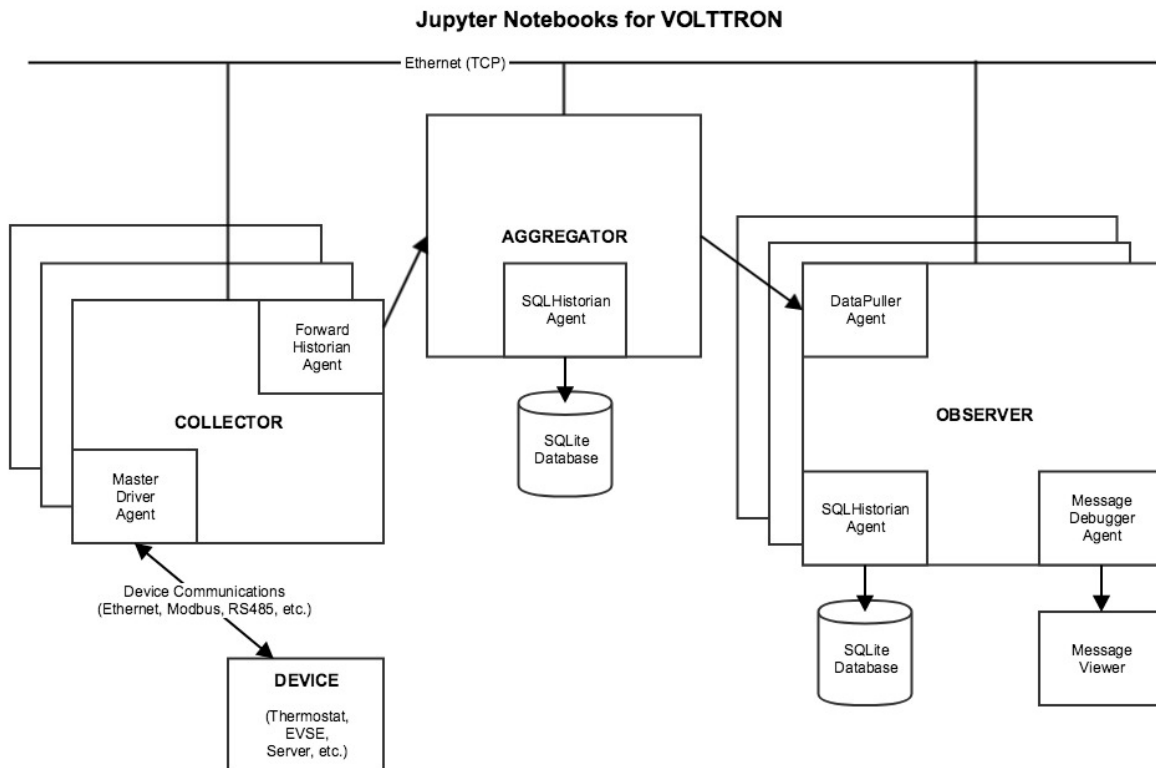
Jupyter is an open-source web application that lets you create and share “notebook” documents. A notebook displays formatted text along with live code that can be executed from the browser, displaying the execution output and preserving it in the document. Notebooks that execute Python code used to be called *iPython Notebooks*. The iPython Notebook project has now merged into Project Jupyter.

### 2.24.1 Using Jupyter to Manage a Set of VOLTTRON Servers

The following Jupyter notebooks for VOLTTRON have been provided as examples:

- **Collector notebooks.** Each Collector notebook sets up a particular type of device driver and forwards device data to another VOLTTRON instance, the Aggregator.
  - **SimulationCollector notebook.** This notebook sets up a group of Simulation device drivers and forwards device data to another VOLTTRON instance, the Aggregator.
  - **BacnetCollector notebook.** This notebook sets up a Bacnet (or Bacnet gateway) device driver and forwards device data to another VOLTTRON instance, the Aggregator.
  - **ChargePointCollector notebook.** This notebook sets up a ChargePoint device driver and forwards device data to another VOLTTRON instance, the Aggregator.
  - **SEP2Collector notebook.** This notebook sets up a SEP2.0 (IEEE 2030.5) device driver and forwards device data to another VOLTTRON instance, the Aggregator. The Smart Energy Profile 2.0 (“SEP2”) protocol implements IEEE 2030.5, and is capable of connecting a wide array of smart energy devices to the Smart Grid. The standard is designed to run over TCP/IP and is physical layer agnostic.
- **Aggregator notebook.** This notebook sets up and executes aggregation of forwarded data from other VOLTTRON instances, using a historian to record the data.
- **Observer notebook.** This notebook sets up and executes a DataPuller that captures data from another VOLTTRON instance, using a Historian to record the data. It also uses the Message Debugger agent to monitor messages flowing across the VOLTTRON bus.

Each notebook configures and runs a set of VOLTTRON Agents. When used as a set they implement a multiple-VOLTTRON-instance architecture that captures remote device data, aggregates it, and reports on it, routing the data as follows:



## 2.24.2 Install VOLTRON and Jupyter on a Server

The remainder of this guide describes how to set up a host for VOLTRON and Jupyter. Use this setup process on a server in order to prepare it to run Jupyter notebook for VOLTRON.

### Set Up the Server and Install VOLTRON

The following is a complete, but terse, description of the steps for installing and running VOLTRON on a server. For more detailed, general instructions, see [Installing Volttron](#).

The VOLTRON server should run on the same host as the Jupyter server.

- Load third-party software:

```
$ sudo apt-get update
$ sudo apt-get install build-essential python-dev openssl libssl-dev libevent-dev git
$ sudo apt-get install sqlite3
```

- Clone the VOLTRON repository from github:

```
$ cd ~
$ mkdir repos
$ cd repos
$ git clone https://github.com/VOLTRON/volttron/
```

- Check out the develop (or master) branch and bootstrap the development environment:

```
$ cd volttron
$ git checkout develop
$ python bootstrap.py
```

- Activate and initialize the VOLTRON virtual environment:

Run the following each time you open a new command-line shell on the server:

```
$ export VOLTRON_ROOT=~/.repos/volttron
$ export VOLTRON_HOME=~/.volttron
$ cd $VOLTRON_ROOT
$ source env/bin/activate
```

### Install Extra Libraries

- Add Python libraries to the VOLTRON virtual environment:

These notebooks use third-party software that's not included in VOLTRON's standard distribution that was loaded by *bootstrap.py*. The following additional packages are required:

- Jupyter
- SQLAlchemy (for the Message Debugger)
- Suds (for the ChargePoint driver, if applicable)
- Numpy and Matplotlib (for plotted output)

**Note:** A Jupyter installation also installs and/or upgrades many dependent libraries. Doing so could disrupt other work on the OS, so it's safest to load Jupyter (and any other library code) in a virtual environment. VOLTRON

runs in a virtual environment during normal operation, so if you're using Jupyter in conjunction with VOLTTRON, it should be installed in your VOLTTRON virtual environment (In other words, be sure to use `cd $VOLTRON_ROOT` and `source env/bin/activate` to activate the virtual environment before running `pip install`.)

---

- Install the third-party software:

```
$ pip install SQLAlchemy==1.1.4
$ pip install suds-jurko==0.6
$ pip install numpy
$ pip install matplotlib
$ pip install jupyter
```

---

**Note:** If `pip install` fails due to an untrusted cert, try using this command instead:

```
$ pip install --trusted-host pypi.python.org <libraryname>
```

An `InsecurePlatformWarning` may be displayed, but it typically won't stop the installation from proceeding.

---

### 2.24.3 Configure VOLTTRON

Use the `vcfg` wizard to configure the VOLTTRON instance. By default, the wizard configures a VOLTTRON instance that communicates with agents only on the local host (ip 127.0.0.1). This set of notebooks manages communications among multiple VOLTTRON instances on different hosts. To enable this cross-host communication on VOLTTRON's web server, replace 127.0.0.1 with the host's IP address, as follows:

```
$ vcfg
```

Accept all defaults, except as follows:

- If a prompt defaults to 127.0.0.1 as an IP address, substitute the *host's IP address* (this may happen multiple times).
- When asked whether this is a volttron central, answer *Y*.
- When prompted for a username and password, use *admin* and *admin*.

### 2.24.4 Start VOLTTRON

Start the main VOLTTRON process, logging to `$VOLTRON_ROOT/volttron.log`:

```
$ volttron -vv -l volttron.log --msgdebug
```

This runs VOLTTRON as a foreground process. To run it in the background, use:

```
$ ./start-volttron --msgdebug
```

This also enables the Message Debugger, a non-production VOLTTRON debugging aid that's used by some notebooks. To run with the Message Debugger disabled (VOLTTRON's normal state), omit the `--msgdebug` flag.

Now that VOLTTRON is running, it's ready for agent configuration and execution. Each Jupyter notebook contains detailed instructions and executable code for doing that.

### 2.24.5 Configure Jupyter

More detailed information about installing, configuring and using Jupyter Notebooks is available on the Project Jupyter site, <http://jupyter.org/>.

- Create a Jupyter configuration file:

```
$ jupyter notebook --generate-config
```

- Revise the Jupyter configuration:

Open `~/jupyter/jupyter_notebook_config.py` in your favorite text editor. Change the configuration to accept connections from any IP address (not just from localhost) and use a specific, non-default port number:

- Un-comment `c.NotebookApp.ip` and set it to: `*` instead of `localhost`
- Un-comment `c.NotebookApp.port` and set it to: `8891` instead of `8888`

Save the config file.

- Open ports for TCP connections:

Make sure that your Jupyter server host's security rules allow inbound TCP connections on port `8891`.

If the VOLTTTRON instance needs to receive TCP requests, for example ForwardHistorian or DataPuller messages from other VOLTTTRON instances, make sure that the host's security rules also allow inbound TCP communications on VOLTTTRON's port, which is usually `22916`.

### 2.24.6 Launch Jupyter

- Start the Jupyter server:

In a separate command-line shell, set up VOLTTTRON's environment variables and virtual environment, and then launch the Jupyter server:

```
$ export VOLTTTRON_HOME=(your voltttron home directory, e.g. ~/.voltttron)
$ export VOLTTTRON_ROOT=(where voltttron was installed; e.g. ~/repos/voltttron)
$ cd $VOLTTTRON_ROOT
$ source env/bin/activate
$ cd examples/JupyterNotebooks
$ jupyter notebook --no-browser
```

- Open a Jupyter client in a web browser:

Look up the host's IP address (e.g., using `ifconfig`). Open a web browser and navigate to the URL that was displayed when you started jupyter, replacing `localhost` with that IP address. A Jupyter web page should display, listing your notebooks.

## 2.25 Python for Matlab Users

Matlab is a popular proprietary programming language and tool suite with built in support for matrix operations and graphically plotting computation results. The purpose of this document is to introduce Python to those already familiar Matlab so it will be easier for them to develop tools and agents in VOLTTTRON.

### 2.25.1 A Simple Function

Python and Matlab are similar in many respects, syntactically and semantically. With the addition of the NumPy library in Python, almost all numerical operations in Matlab can be emulated or directly translated. Here are functions in each language that perform the same operation:

```
% Matlab
function [result] = times_two(number)
    result = number * 2;
end
```

```
# Python
def times_two(number):
    result = number * 2
    return result
```

Some notes about the previous functions:

1. Values are explicitly returned with the *return* statement. It is possible to return multiple values, as in Matlab, but doing this without a good reason can lead to overcomplicated functions.
2. Semicolons are not used to end statements in python, and white space is significant. After a block is started (if, for, while, functions, classes) subsequent lines should be indented with four spaces. The block ends when the programmer stops adding the extra level of indentation.

### 2.25.2 Translating

The following may be helpful if you already have a Matlab file or function that will be translated into Python. Many of the syntax differences between Matlab and Python can be rectified with your text editor's find and replace feature.

Start by copying all of your Matlab code into a new file with a *.py* extension. It is recommended to start by commenting everything out and uncommenting the Matlab code in chunks. This way it is possible to write valid Python and verify it as you translate, instead of waiting till the whole file is "translated". Editors designed to work with Python should be able to highlight syntax errors as well.

1. Comments are created with a *%*. Find and replace these with *#*.

```
def test_function():
    # single line Python comment
    """
    Multi-line Python comment
    """
    pass # inline Python comment
```

1. Change *elseif* blocks to *elif* blocks.

```
if thing == 0:
    do_thing1()
elif thing == 1:
    do_thing2()
else:
    do_the_last_thing()
```

1. Python indexes start at zero instead of one. Array slices and range operations don't include the upper bound, so only the lower bound should decrease by one. The following examples are of Python code in the console:



```
>>> test_array = [0, 1, 2, 3, 4]
>>> test_array[0]
0
>>> test_array[1]
1
>>> test_array[0:2]
[0, 1]
>>>>> test_array[:2]
[0, 1]
>>> test_array[2:]
[2, 3, 4]
>>>
```

1. Semicolons in Matlab are used to suppress output at the end of lines and for organizing array literals. After arranging the arrays into nested lists, all semicolons can be removed.
2. The *end* keyword in Matlab is used both to access the last element in an array and to close blocks. The array use case can be replaced with *-1* and the others can be removed entirely.

```
>>> test_array = [0, 1, 2, 3, 4]
>>> test_array[-1]
4
>>>
```

## A More Concrete Example

In the [Building Economic Dispatch](#) project, a sibling project to VOLTTRON, a number of components written in Matlab would create a matrix out of some collection of columns and perform least squares regression using the *matrix division* operator. This is straightforward and very similar in both languages assuming that all of the columns are defined and are the same length.

```
% Matlab
XX = [U, xbp, xbp2, xbp3, xbp4, xbp5];
AA = XX \ ybp;
```

```
# Python
import numpy as np

XX = np.column_stack((U, xbp, xbp2, xbp3, xbp4, xbp5))
AA, resid, rank, s = np.linalg.lstsq(XX, ybp)
```

This pattern also included the creation of the *U* column, a column of ones used as the bias term in the linear equation. In order to make the Python version more readable and more robust, the pattern was removed from each component and replaced with a single function call to *least\_squares\_regression*.

This function does some validation on the input parameters, automatically creates the bias column, and returns the least squares solution to the system. Now if we want to change how the solution is calculated we only have to change the one function, instead of each instance where the pattern was written originally.

```
def least_squares_regression(inputs=None, output=None):
    if inputs is None:
        raise ValueError("At least one input column is required")
    if output is None:
        raise ValueError("Output column is required")
```

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```
if type(inputs) != tuple:
    inputs = (inputs,)

ones = np.ones(len(inputs[0]))
x_columns = np.column_stack((ones,) + inputs)

solution, resid, rank, s = np.linalg.lstsq(x_columns, output)
return solution
```

### 2.25.3 Lessons Learned (sometimes the hard way)

#### Variable Names

Use descriptive function and variable names whenever possible. The most important things to consider here are reader comprehension and searching. Consider a variable called *hdr*. Is it *header* without any vowels, or is it short for *high-dynamic-range*? Spelling out full words in variable names can save someone else a lot of guesswork.

Searching comes in when we're looking for instances of a string or variable. Single letter variable names are impossible to search for. Variables names describing the value being stored in a concise but descriptive manner are preferred.

#### Matlab load/save

Matlab has built-in functions to automatically save and load variables from your programs to disk. Using these functions can lead to poor program design and should be avoided if possible. It would be best to refactor as you translate if they are being used. Few operations are so expensive that that cannot be redone every time the program is run. For part of the program that saves variables, consider making a function that simply returns them instead.

If your Matlab program is loading csv files then use the Pandas library when working in python. Pandas works well with NumPy and is the go-to library when using csv files that contain numeric data.

### 2.25.4 More Resources

[NumPy for Matlab Users](#) Has a nice list of common operations in Matlab and NumPy.

[NumPy Homepage](#)

[Pandas Homepage](#)

## 2.26 Bootstrap Process

The *bootstrap.py* Python script in the root directory of the VOLTTRON repository may be used to create VOLTTRON's Python virtual environment and install or update service agent dependencies.

The first running of *bootstrap.py* will be against the systems *python3* executable. During this initial step a virtual environment is created using the *venv* module. Additionally, all requirements for running a base volttron instance are installed. A user can specify additional arguments to the *bootstrap.py* script allowing a way to quickly install dependencies for service agents (e.g. *bootstrap.py --mysql*).

```
# bootstrap with additional dependency requirements for web enabled agents.
user@machine$ python3 bootstrap.py --web
```

After activating an environment (source env/bin/activate) one can use the *bootstrap.py* script to install more service agent dependencies by executing the same bootstrap.py command.

**Note:** In the following example one can tell the environment is activated based upon the (volttron) prefix to the command prompt

```
# Adding additional database requirement for crate
(volttron) user@machine$ python3 bootstrap.py --crate
```

If a fresh install is necessary one can use the `--force` argument to rebuild the virtual environment from scratch.

```
# Rebuild the environment from the system's python3
user@machine$ python3 bootstrap.py --force
```

**Note:** Multiple options can be specified on the command line *python3 bootstrap.py --web --crate* installs dependencies for web enabled agents as well as the Crate database historian.

### 2.26.1 Bootstrap Options

The *bootstrap.py* script takes several options that allow customization of the environment, installing and update packages, and setting the package locations. The following sections can be reproduced by executing:

```
# Show the help output from bootstrap.py
user@machine$ python3 bootstrap --help
```

The options for customizing the location of the virtual environment are as follows.

```
--envdir VIRTUAL_ENV  alternate location for virtual environment
--force                force installing in non-empty directory
-o, --only-virtenv     create virtual environment and exit (skip install)
--prompt PROMPT        provide alternate prompt in activated environment
                        (default: volttron)
```

Additional options are available for customizing where an environment will retrieve packages installed.

```
update options:
  --offline             install from cache without downloading
  -w, --wheel           build wheels in the pip wheelhouse
```

To help bootstrap an environment in the shortest number of steps we have grouped dependency packages under named collections. For example, the `--web` argument will install six different packages from a single call to *bootstrap.py --web*. The following collections are available to use.

```
...

Extra packaging options:
  --all                All dependency groups.
  --crate              Crate database adapter
  --databases          All of the databases (crate, mysql, postgres, etc).
  --dnp3               Dependencies for the dnp3 agent.
  --documentation      All dependency groups to allow generation of documentation.
  ↪without error.
```

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```

--drivers          All drivers known to the platform driver.
--influxdb         Influx database adapter
--market           Base market agent dependencies
--mongo            Mongo database adapter
--mysql            Mysql database adapter
--pandas           Pandas numerical analysis tool
--postgres         Postgres database adapter
--testing          A variety of testing tools for running unit/integration tests.
--web              Packages facilitating the building of web enabled agents.
--weather          Packages for the base weather agent

rabbitmq options:
  --rabbitmq [RABBITMQ]
                        install rabbitmq server and its dependencies. optional
                        argument: Install directory that exists and is
                        writeable. RabbitMQ server will be installed in a
                        subdirectory. Defaults to /home/osboxes/rabbitmq_server
...

```

## 2.27 Platform Configuration

Each instance of the VOLTRON platform includes a *config* file which is used to configure the platform instance on startup. This file is kept in *VOLTRON\_HOME* and is created using the *volttron-cfg* (*vcfg*) command, or will be created with default values on start up of the platform otherwise.

Following is helpful information about the *config* file and the *vcfg* command.

### 2.27.1 VOLTRON\_HOME

By default, the VOLTRON project bases its files out of *VOLTRON\_HOME* which defaults to *~/volttron*. This directory features directories and files used by the platform for important operation and management tasks as well as containing packaged agents and their individual runtime environments (including data directories, identity files, etc.)

- **\$VOLTRON\_HOME/agents** - contains the agents installed on the platform
- **\$VOLTRON\_HOME/auth.json** - file containing authentication and authorization rules for agents connecting to the VOLTRON instance.
- **\$VOLTRON\_HOME/certificates** - contains the certificates for use with the Licensed VOLTRON code.
- **\$VOLTRON\_HOME/configuration\_store** - agent configuration store files are stored in this directory. Each agent may have a file here in which JSON representations of their stored configuration files are stored.
- **\$VOLTRON\_HOME/run** - contains files create by the platform during execution. The main ones are the ZMQ files created for publish and subscribe functionality.
- **\$VOLTRON\_HOME/ssh** - keys used by agent mobility in the Licensed VOLTRON code
- **\$VOLTRON\_HOME/config** - Default location to place a config file to override any platform settings.
- **\$VOLTRON\_HOME/packaged** - agent packages created with *volttron-pkg* are created in this directory
- **\$VOLTRON\_HOME/VOLTRON\_PID** - File containing the Unix process ID for the VOLTRON platform - used for tracking platform status.

## 2.27.2 VOLTTRON Config File

The *config* file in *VOLTTRON\_HOME* is the config file used by the platform. This configuration file specifies the behavior of the platform at runtime, including which message bus it uses, the name of the platform instance, and the address bound to by *VIP*. The *VOLTTRON Config* wizard (explained below) can be used to configure an instance for the first time. The user may run the wizard again or edit the config file directly as necessary for operations. The following is a simple example *config* for a multi-platform deployment:

```
[volttron]
message-bus = zmq
vip-address = tcp://127.0.0.1:22916
bind-web-address = <web service bind address>
web-ssl-cert = <VOLTTRON_HOME>/certificates/certs/platform_web-server.crt
web-ssl-key = <VOLTTRON_HOME>/certificates/private/platform_web-server.pem
instance-name = volttron1
volttron-central-address = <VC address>
```

The example consists of the following entries:

- **message-bus** - message bus being used for this instance (rmq/zmq)
- **vip-address** - address bound to by VIP for message bus communication
- **bind-web-address** - Optional, needed if platform has to support web feature. Represents address bound to by the platform web service for handling HTTP(s) requests. Typical address would be `https://<hostname>:8443`
- **web-ssl-cert** - Optional, needed if platform has to support web feature. Represents path to the certificate for the instance's web service
- **web-ssl-key** - Optional, needed if platform has to support web feature. Represents secret key or path to secret key file used by web service authenticate requests
- **instance-name** - name of this VOLTTRON platform instance, should be unique for the deployment
- **volttron-central-address** - Optional, needed if instance is running Volttron Central. Represents web address of VOLTTRON Central agent managing this platform instance. Typical address would be `https://<hostname>:8443`

## 2.27.3 VOLTTRON Config

The *volttron-cfg* or *vcfg* command allows for an easy configuration of the VOLTTRON environment. The command includes the ability to set up the platform configuration, an instance of the platform historian, VOLTTRON Central UI, and VOLTTRON Central Platform agent.

Running *vcfg* will create a *config* file in *VOLTTRON\_HOME* which will be populated according to the answers to prompts. This process should be repeated for each platform instance, and can be re-run to reconfigure a platform instance.

---

**Note:** To create a simple instance of VOLTTRON, leave the default response, or select yes (y) if prompted for a yes or no response [Y/N]. You must choose a username and password for the VOLTTRON Central admin account if selected.

---

A set of example responses are included here (*username* is *user*, *localhost* is *volttron-pc*):

```
(voltttron) user@voltttron-pc:~/voltttron$ vcfg

Your VOLTTTRON_HOME currently set to: /home/user/.voltttron

Is this the voltttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]: y
What is the protocol for this instance? [https]:
Web address set to: https://voltttron-pc
What is the port for this instance? [8443]:
Would you like to generate a new web certificate? [Y]:
WARNING! CA certificate does not exist.
Create new root CA? [Y]:

Please enter the following details for web server certificate:
  Country: [US]:
  State: WA
  Location: Richland
  Organization: PNNL
  Organization Unit: VOLTTTRON
Created CA cert
Creating new web server certificate.
Is this an instance of voltttron central? [N]: y
Configuring /home/user/voltttron/services/core/VoltttronCentral.
Installing voltttron central.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
VC admin and password are set up using the admin web interface.
After starting VOLTTTRON, please go to https://voltttron-pc:8443/admin/login.html to
→complete the setup.
Will this instance be controlled by voltttron central? [Y]:
Configuring /home/user/voltttron/services/core/VoltttronCentralPlatform.
What is the name of this instance? [voltttron1]:
Voltttron central address set to https://voltttron-pc:8443
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
Would you like to install a platform historian? [N]: y
Configuring /home/user/voltttron/services/core/SQLHistorian.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
Would you like to install a platform driver? [N]: y
Configuring /home/user/voltttron/services/core/PlatformDriverAgent.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Would you like to**install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: y
Would you like to install a listener agent? [N]: y
Configuring examples/ListenerAgent.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
Finished configuration!

You can now start the voltttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/user/.voltttron/config
```

Once this is finished, run VOLTTRON and test the new configuration.

## Optional Arguments

- **-v, --verbose** - Enables verbose output in standard-output (PIP output, etc.)
- **--vhome VHOME** - Provide a path to set *VOLTTRON\_HOME* for this instance
- **--instance-name INSTANCE\_NAME** - Provide a name for this instance. Required for running secure agents mode
- **--list-agents** - Display a list of configurable agents (Listener, Platform Driver, Platform Historian, VOLTTRON Central, VOLTTRON Central Platform)
- **--agent AGENT [AGENT ...]** - Configure listed agents
- **--agent-isolation-mode** - Require that agents run as their own Unix users (this requires running *scripts/secure\_user\_permissions.sh* as *sudo*)

## RabbitMQ Arguments

vcfg command to configure a single RabbitMQ instance of VOLTTRON.

Usage:

```
vcfg rabbitmq single [--config Optional path to rabbitmq config file]``
```

vcfg command to configure a federation instance of RabbitMQ VOLTTRON.

Usage:

```
vcfg rabbitmq federation [--config Optional path to rabbitmq federation_
↪config file] [--max-retries Optional maximum CSR retry attempt]``
```

vcfg command to create shovel to send messages from one RabbitMQ instance of VOLTTRON to another.

Usage:

```
vcfg rabbitmq shovel [--config Optional path to shovel config file] [--max-
↪retries Optional maximum CSR retry attempt]``
```

## 2.28 Planning a Deployment

The 3 major installation types for VOLTTRON are doing development, doing research using VOLTTRON, and collecting and managing physical devices.

Development and Research installation tend to be smaller footprint installations. For development, the data is usually synthetic or copied from another source. The existing documentation covers development installs in significant detail.

Other deployments will have a better installation experience if they consider certain kinds of questions while they plan their installation.

### 2.28.1 Questions

- Do you want to send commands to the machines ?
- Do you want to store the data centrally ?
- How many machines do you expect to collect data from on each “collector” ?
- How often will the machines collect data ?
- Are all the devices visible to the same network ?
- What types of VOLTTRON applications do you want to run ?

### Commands

If you wish to send commands to the devices, you will want to install and configure the Volttron Central agent. If you are only using VOLTTRON to securely collect the data, you can turn off the extra agents to reduce the footprint.

### Storing Data

VOLTTRON supports multiple historians. MySQL and MongoDB are the most commonly used. As you plan your installation, you should consider how quickly you need access to the data and where. If you are looking at the health and well-being of an entire suite of devices, its likely that you want to do that from a central location. Analytics can be performed at the edge by VOLTTRON applications or can be performed across the data usually from a central data repository. The latency that you can tolerate in your data being available will also determine choices in different agents (ForwardHistorian versus Data Mover)

### How Many

The ratio of how many devices-to-collector machine is based on several factors. These include:

- how much memory and network bandwidth the collection machine has. More = More devices
- how fast the local storage is can affect how fast the data cache can be written. Very slow storage devices can fall behind

The second half of the “how many” question is how many collector platforms are writing to a single VOLTTRON platform to store data - and whether that storage is local, remote, big enough, etc.

If you are storing more than moderate amount of data, you will probably benefit from installing your database on a different machine than your concrete historian machine.

---

**Note:** This is contra-indicated if you have a slow network connection between you concrete historian and your database machine.

---

In synthetic testing up to 6 virtual machines hosting 500 devices each (18 points) were easily supported by a single centralized platform writing to a Mongo database - using a high speed network. That central platform experienced very little CPU or memory load when the VOLTTRON Central agent was disabled.



## How Often

This question is closely related to the last. A higher sampling frequency will create more data. This will place more work in the storage phase.

## Networks

In many cases, there are constraints on how networks can interact with each other. In many cases, these include security considerations. On some sites, the primary network will be protected from less secure networks and may require different installation considerations. For example, if a data collector machine and the database machine are on the same network with sufficient security, you may choose to have the data collector write directly to the database. If the collector is on an isolated building network then you will likely need to use the ForwardHistorian to bridge the two networks.

## Other Considerations

Physical location and maintenance of collector machines must be considered in all live deployments. Although the number of data points may imply a heavy load on a data collection box, the physical constraints may limit the practicality of having more than a single box. The other side of that discussion is deploying many collector boxes may be simpler initially, but may create a maintenance challenge if you don't plan ahead on how you apply patches, etc.

Naming conventions should also be considered. The ability to trace data through the system and identify the collector machine and device can be invaluable in debugging and analysis.

## 2.28.2 Deployment Options

There are several ways to deploy the VOLTTRON platform in a Linux environment. It is up to the user to determine which is right for them. The following assumes that the platform has already been bootstrapped and is ready to run.

### Simple Command Line

With the VOLTTRON environment activated the platform can be started simply by running VOLTTRON on the command line.

```
$volttron -vv
```

This will start the platform in the current terminal with very verbose logging turned on. This is most appropriate for testing Agents or testing a deployment for problems before switching to a more long term solution. This will print all log messages to the console in real time.

This should not be used for long term deployment. As soon as an SSH session is terminated for whatever reason the processes attached to that session will be killed. This also will not capture log message to a file.

## Running VOLTTRON as a Background Process

A simple, more long term solution, is to run volttron in the background and disown it from the current terminal.

**Warning:** If you plan on running VOLTTRON in the background and detaching it from the terminal with the `disown` command be sure to redirect `stderr` and `stdout` to `/dev/null`. Even if logging to a file is used some libraries which VOLTTRON relies on output directly to `stdout` and `stderr`. This will cause problems if those file descriptors are not redirected to `/dev/null`.

```
$volttron -vv -l volttron.log > /dev/null 2>&1&
```

Alternatively:

```
``./start-volttron``
```

---

**Note:** If you are not in an activated environment, this script will start the platform running in the background in the correct environment, however the environment will not be activated for you, you must activate it yourself.

---

**If there are other jobs running in your terminal be sure to disown the correct one.**

```
$jobs
[1]+  Running                  something else
[2]+  Running                  ./start-volttron

#Disown VOLTTRON
$disown %2
```

This will run the VOLTTRON platform in the background and turn it into a daemon. The log output will be directed to a file called `volttron.log` in the current directory.

To keep the size of the log under control for more longer term deployments us the rotating log configuration file `examples/rotatinglog.py`.

```
$volttron -vv --log-config examples/rotatinglog.py > /dev/null 2>&1&
```

This will start a rotate the log file at midnight and limit the total log data to seven days worth.

The main downside to this approach is that the VOLTTRON platform will not automatically resume if the system is restarted. It will need to be restarted manually after reboot.

## Setting up VOLTTRON as a System Service

### Systemd

An example service file `scripts/admin/volttron.service` for `systemd` can be used as a starting point for setting up VOLTTRON as a service. Note that as this will redirect all the output that would be going to `stdout` - to the `syslog`. This can be accessed using *journalctl*. For systems that run all the time or have a high level of debugging turned on, we recommend checking the system's `logrotate` settings.

```
[Unit]
Description=VOLTTRON Platform Service
After=network.target
```

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```
[Service]
Type=simple

#Change this to the user that VOLTRON will run as.
User=volttron
Group=volttron

#Uncomment and change this to specify a different VOLTRON_HOME
#Environment="VOLTRON_HOME=/home/volttron/.volttron"

#Change these to settings to reflect the install location of VOLTRON
WorkingDirectory=/var/lib/volttron
ExecStart=/var/lib/volttron/env/bin/volttron -vv
ExecStop=/var/lib/volttron/env/bin/volttron-ctl shutdown --platform

[Install]
WantedBy=multi-user.target
```

After the file has been modified to reflect the setup of the platform you can install it with the following commands. These need to be run as root or with `sudo` as appropriate.

```
#Copy the service file into place
cp scripts/admin/volttron.service /etc/systemd/system/

#Set the correct permissions if needed
chmod 644 /etc/systemd/system/volttron.service

#Notify systemd that a new service file exists (this is crucial!)
systemctl daemon-reload

#Start the service
systemctl start volttron.service
```

## Init.d

An example init script `scripts/admin/volttron` can be used as a starting point for setting up VOLTRON as a service on `init.d` based systems.

Minor changes may be needed for the file to work on the target system. Specifically the `USER`, `VLHOME`, and `VOLTRON_HOME` variables may need to be changed.

```
...
#Change this to the user VOLTRON will run as.
USER=volttron
#Change this to the install location of VOLTRON
VLHOME=/var/lib/volttron

...

#Uncomment and change this to specify a different VOLTRON_HOME
#export VOLTRON_HOME=/home/volttron/.volttron
```

The script can be installed with the following commands. These need to be run as root or with `sudo` as appropriate.

```
#Copy the script into place
cp scripts/admin/volttron /etc/init.d/

#Make the file executable
chmod 755 /etc/init.d/volttron

#Change the owner to root
chown root:root /etc/init.d/volttron

#These will set it to startup automatically at boot
update-rc.d volttron defaults

#Start the service
/etc/init.d/volttron start
```

## 2.29 Single Machine

The purpose of this demonstration is to show the process of setting up a simple VOLTTRON instance for use on a single machine.

---

**Note:** The simple deployment example below considers only the ZeroMQ deployment scenario. For RabbitMQ deployments, read and perform the RabbitMQ installation steps from the *platform installation* instructions and configuration steps from *VOLTTRON Config*.

---

### 2.29.1 Install and Build VOLTTRON

First, *install* VOLTTRON:

For a quick reference for Ubuntu machines:

```
sudo apt-get update
sudo apt-get install build-essential libffi-dev python3-dev python3-venv openssl_
↳libssl-dev libevent-dev git
git clone https://github.com/VOLTTRON/volttron/
cd volttron
python3 bootstrap.py --drivers --databases
```

---

**Note:** For additional detail and more information on installing in other environments, please see the *platform install* section. See the *bootstrap process* docs for more information on its operation and available options.

---

## Activate the Environment

After the build is complete, activate the VOLTTTRON environment.

```
source env/bin/activate
```

## Run VOLTTTRON Config

The *volttron-cfg* or *vcfg* commands can be used to configure platform communication. For an example single machine deployment, most values can be left at their default values. The following is a simple case example of running *vcfg*:

```
(voltttron) user@voltttron-pc:~/voltttron$ vcfg

Your VOLTTTRON_HOME currently set to: /home/james/.voltttron

Is this the voltttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]:
Will this instance be controlled by voltttron central? [Y]: N
Would you like to install a platform historian? [N]:
Would you like to install a platform driver? [N]:
Would you like to install a listener agent? [N]:
Finished configuration!

You can now start the voltttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/james/.voltttron/config
```

To learn more, read the *voltttron-config* section of the Platform Features docs.

**Note:** Steps below highlight manually installing some example agents. To skip manual install, supply *y* or *Y* for the platform historian, platform driver and listener agent installation options.

## Start VOLTTTRON

The most convenient way to start the platform is with the *.start-voltttron* command (from the voltttron root directory).

```
./start-voltttron
```

The output following the platform starting successfully will appear like this:

```
2020-10-27 11:34:33,593 () voltttron.platform.agent.utils DEBUG: value from env None
2020-10-27 11:34:33,593 () voltttron.platform.agent.utils DEBUG: value from config_
↪False
2020-10-27 11:34:35,656 () root DEBUG: Creating ZMQ Core config.store
2020-10-27 11:34:35,672 () voltttron.platform.store INFO: Initializing configuration_
↪store service.
2020-10-27 11:34:35,717 () root DEBUG: Creating ZMQ Core platform.auth
2020-10-27 11:34:35,728 () voltttron.platform.auth INFO: loading auth file /home/james/
↪.voltttron/auth.json
```

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```

2020-10-27 11:34:35,731 () volttron.platform.auth INFO: auth file /home/james/.
↳volttron/auth.json loaded
2020-10-27 11:34:35,732 () volttron.platform.agent.utils INFO: Adding file watch for /
↳home/james/.volttron/auth.json dirname=/home/james/.volttron, filename=auth.json
2020-10-27 11:34:35,734 () volttron.platform.agent.utils INFO: Added file watch for /
↳home/james/.volttron/auth.json
2020-10-27 11:34:35,734 () volttron.platform.agent.utils INFO: Adding file watch for /
↳home/james/.volttron/protected_topics.json dirname=/home/james/.volttron,
↳filename=protected_topics.json
2020-10-27 11:34:35,736 () volttron.platform.agent.utils INFO: Added file watch for /
↳home/james/.volttron/protected_topics.json
2020-10-27 11:34:35,737 () volttron.platform.vip.pubsubservice INFO: protected-topics
↳loaded
2020-10-27 11:34:35,739 () volttron.platform.vip.agent.core INFO: Connected to
↳platform: router: fc054c9f-aa37-4842-a618-6e70d53530f0 version: 1.0 identity:
↳config.store
2020-10-27 11:34:35,743 () volttron.platform.vip.agent.core INFO: Connected to
↳platform: router: fc054c9f-aa37-4842-a618-6e70d53530f0 version: 1.0 identity:
↳platform.auth
2020-10-27 11:34:35,746 () volttron.platform.vip.pubsubservice INFO: protected-topics
↳loaded
2020-10-27 11:34:35,750 () volttron.platform.vip.agent.subsystems.configstore DEBUG:
↳Processing callbacks for affected files: {}
2020-10-27 11:34:35,879 () root DEBUG: Creating ZMQ Core control
2020-10-27 11:34:35,908 () root DEBUG: Creating ZMQ Core keydiscovery
2020-10-27 11:34:35,913 () root DEBUG: Creating ZMQ Core pubsub
2020-10-27 11:34:35,924 () volttron.platform.auth INFO: loading auth file /home/james/
↳.volttron/auth.json
2020-10-27 11:34:38,010 () volttron.platform.vip.agent.core INFO: Connected to
↳platform: router: fc054c9f-aa37-4842-a618-6e70d53530f0 version: 1.0 identity:
↳control
2020-10-27 11:34:38,066 () volttron.platform.vip.agent.core INFO: Connected to
↳platform: router: fc054c9f-aa37-4842-a618-6e70d53530f0 version: 1.0 identity: pubsub
2020-10-27 11:34:38,069 () volttron.platform.vip.agent.core INFO: Connected to
↳platform: router: fc054c9f-aa37-4842-a618-6e70d53530f0 version: 1.0 identity:
↳keydiscovery
2020-10-27 11:34:38,429 () volttron.platform.auth WARNING: Attempt 1 to get peerlist
↳failed with exception 0.5 seconds
2020-10-27 11:34:38,430 () volttron.platform.auth WARNING: Get list of peers from
↳subsystem directly
2020-10-27 11:34:38,433 () volttron.platform.auth INFO: auth file /home/james/.
↳volttron/auth.json loaded
2020-10-27 11:34:38,434 () volttron.platform.auth INFO: loading auth file /home/james/
↳.volttron/auth.json
2020-10-27 11:34:40,961 () volttron.platform.auth WARNING: Attempt 1 to get peerlist
↳failed with exception 0.5 seconds
2020-10-27 11:34:40,961 () volttron.platform.auth WARNING: Get list of peers from
↳subsystem directly
2020-10-27 11:34:40,969 () volttron.platform.auth INFO: auth file /home/james/.
↳volttron/auth.json loaded

```

**Note:** While running the platform with verbose logging enabled, the *volttron.log* file is useful for confirming successful platform operations or debugging. It is commonly recommended to open a new terminal window and run the following command to view the VOLTTRON logs as they are created:

```
tail -f volttron.log
```

## 2.29.2 Install Agents and Historian

Out of the box, VOLTRON includes a number of agents which may be useful for single machine deployments:

- **historians** - Historians automatically record a data from a number of topics published to the bus. For more information on the historian framework or one of the included concrete implementations, view the [Historian Framework](#)
- **Listener** - This example agent can be useful for debugging drivers or other agents publishing to the bus. For more details please read [Listener Agent](#)
- **Platform Driver** - The [Platform Driver](#) is responsible for managing device communication on a platform instance.
- **weather agents** - weather agents can be used to collect weather data from sources like [weather.gov](http://weather.gov)

**Note:** The *services/core*, *services/ops*, and *examples* directories in the repository contain additional agents to use to fit individual use cases.

For a simple setup example, a Platform Driver, SQLite Historian, and Listener are installed using the following steps:

1. Create a configuration file for the Platform Driver and SQLite Historian (it is advised to create a *configs* directory in volttron root to keep configs for a deployment). For information on how to create configurations for these agents, view their docs:
  - [Platform Driver](#)
  - [SQLite Historian](#)
  - [Listener](#)

For a simple example, the configurations can be copied as-is to the *configs* directory:

```
mkdir configs
```

```
cp services/core/PlatformDriverAgent/platform-driver.agent configs/
cp services/core/SQLHistorian/config.sqlite configs/
cp examples/ListenerAgent/config configs/listener.config
```

2. Use the *install-agent.py* script to install the agent on the platform:

```
python scripts/install-agent.py -s services/core/SQLHistorian -c configs/config.
↪sqlite --tag platform_historian
python scripts/install-agent.py -s services/core/PlatformDriverAgent -c configs/
↪platform-driver.agent --tag platform_driver
python scripts/install-agent.py -s examples/ListenerAgent -c configs/listener.config -
↪tag listener
```

**Note:** The *volttron.log* file will contain logging indicating that the agent has installed successfully.

```

2020-10-27 11:42:08,882 () volttron.platform.auth INFO: AUTH: After authenticate user_
↳ id: control.connection, b'c61dff8e-f362-4906-964f-63c32b99b6d5'
2020-10-27 11:42:08,882 () volttron.platform.auth INFO: authentication success:_
↳ userid=b'c61dff8e-f362-4906-964f-63c32b99b6d5' domain='vip', address=
↳ 'localhost:1000:1000:3249', mechanism='CURVE', credentials=[
↳ 'ZrDvPG4JNLE26GoPUrTP22rV0PV8uGCnrXThrNFk_Ec'], user='control.connection'
2020-10-27 11:42:08,898 () volttron.platform.aip DEBUG: Using name template
↳ "listeneragent-3.3_{n}" to generate VIP ID
2020-10-27 11:42:08,899 () volttron.platform.aip INFO: Agent b3e7053c-28e8-414f-b685-
↳ 8522eb230c7a setup to use VIP ID listeneragent-3.3_1
2020-10-27 11:42:08,899 () volttron.platform.agent.utils DEBUG: missing file /home/
↳ james/.volttron/agents/b3e7053c-28e8-414f-b685-8522eb230c7a/listeneragent-3.3/
↳ listeneragent-3.3.dist-info/keystore.json
2020-10-27 11:42:08,899 () volttron.platform.agent.utils INFO: creating file /home/
↳ james/.volttron/agents/b3e7053c-28e8-414f-b685-8522eb230c7a/listeneragent-3.3/
↳ listeneragent-3.3.dist-info/keystore.json
2020-10-27 11:42:08,899 () volttron.platform.keystore DEBUG: calling generate from_
↳ keystore
2020-10-27 11:42:08,909 () volttron.platform.auth INFO: loading auth file /home/james/
↳ .volttron/auth.json
2020-10-27 11:42:11,415 () volttron.platform.auth WARNING: Attempt 1 to get peerlist_
↳ failed with exception 0.5 seconds
2020-10-27 11:42:11,415 () volttron.platform.auth WARNING: Get list of peers from_
↳ subsystem directly
2020-10-27 11:42:11,419 () volttron.platform.auth INFO: auth file /home/james/.
↳ volttron/auth.json loaded

```

3. Use the `vctl status` command to ensure that the agents have been successfully installed:

```
vctl status
```

```

(volttron)user@volttron-pc:~/volttron$ vctl status
AGENT                                IDENTITY                                TAG                                STATUS                                _
↳ HEALTH
8 listeneragent-3.2                  listeneragent-3.2_1 listener
0 platform_driveragent-3.2           platform.driver                        platform_driver
3 sqlhistorianagent-3.7.0            platform.historian                    platform_historian

```

**Note:** After installation, the *STATUS* and *HEALTH* columns of the `vctl status` command will be vacant, indicating that the agent is not running. The `--start` option can be added to the `install-agent.py` script arguments to automatically start agents after they have been installed.

### 2.29.3 Install a Fake Driver

The following are the simplest steps for installing a fake driver for example use. For more information on installing concrete drivers such as the BACnet or Modbus drivers, view their respective documentation in the [Driver framework](#) section.

**Note:** This section will assume the user is currently in the volttron root directory and has created a `configs` directory, activated the Python virtual environment, and started the platform as noted above.



```
cp examples/configurations/drivers/fake.config configs/
cp examples/configurations/drivers/fake.csv configs/
vctl config store platform.driver devices/campus/building/fake configs/fake.config
vctl config store platform.driver fake.csv configs/fake.csv --csv
```

**Note:** For more information on the fake driver, or the configurations used in the above example, view the [docs](#)

## 2.29.4 Testing the Deployment

To test that the configuration was successful, start an instance of VOLTRON in the background:

```
./start-volttron
```

**Note:** This command must be run from the root VOLTRON directory.

Having following the examples above, the platform should be ready for demonstrating the example deployment. Start the Listener, SQLite historian and Platform Driver.

```
vctl start --tag listener platform_historian platform_driver
```

The output should look similar to this:

```
(volttron)user@volttron-pc:~/volttron$ vctl status
```

AGENT	IDENTITY	TAG	STATUS	
↪HEALTH				
8 listeneragent-3.2	listeneragent-3.2_1	listener	running [2810]	GOOD
0 platform_driveragent-3.2	platform.driver	platform_driver	running [2813]	↪GOOD
3 sqlhistorianagent-3.7.0	platform.historian	platform_historian	running [2811]	GOOD

**Note:** The *STATUS* column indicates whether the agent is running. The *HEALTH* column indicates whether the current state of the agent is within intended parameters (if the Platform Driver is publishing, the platform historian has not been backlogged, etc.)

You can further verify that the agents are functioning correctly with `tail -f volttron.log`.

ListenerAgent:

```
2020-10-27 11:43:33,997 (listeneragent-3.3 3294) __main__ INFO: Peer: pubsub, Sender: ↪
↪listeneragent-3.3_1:, Bus: , Topic: heartbeat/listeneragent-3.3_1, Headers: {
↪'TimeStamp': '2020-10-27T18:43:33.988561+00:00', 'min_compatible_version': '3.0',
↪'max_compatible_version': ''}, Message:
'GOOD'
```

Platform Driver with Fake Driver:

```
2020-10-27 11:47:50,037 (listeneragent-3.3 3294) __main__ INFO: Peer: pubsub, Sender:
→platform.driver:, Bus: , Topic: devices/campus/building/fake/all, Headers: {'Date':
→'2020-10-27T18:47:50.005349+00:00', 'TimeStamp': '2020-10-27T18:47:50.005349+00:00',
→'SynchronizedTimeStamp': '2020-10-27T18:47:50.000000+00:00', 'min_compatible_
→version': '3.0', 'max_compatible_version': ''}, Message:
[{'EKG': -0.8660254037844386,
'EKG_Cos': -0.8660254037844386,
'EKG_Sin': -0.8660254037844386,
'Heartbeat': True,
'OutsideAirTemperature1': 50.0,
'OutsideAirTemperature2': 50.0,
'OutsideAirTemperature3': 50.0,
'PowerState': 0,
'SampleBool1': True,
'SampleBool2': True,
'SampleBool3': True,
'SampleLong1': 50,
...}]
```

#### SQLite Historian:

```
2020-10-27 11:50:25,021 (platform_driveragent-4.0 3535) platform_driver.driver DEBUG:
→finish publishing: devices/campus/building/fake/all
2020-10-27 11:50:25,052 (sqlhistorianagent-3.7.0 3551) volttron.platform.dbutils.
→sqlitefuncts DEBUG: Managing store - timestamp limit: None GB size limit: None
```

## 2.30 Multi-Platform Connection

There are multiple ways to establish connection between external VOLTTRON platforms. Given that VOLTTRON now supports ZeroMq and RabbitMQ type of message bus with each using different type authentication mechanism, the number of different ways that agents can connect to external platforms has significantly increased. Various multi-platform deployment scenarios will be covered in this section.

1. Agents can directly connect to external platforms to send and receive messages. Forward historian, Data Mover agents fall under this category. The deployment steps for forward historian is described in [Forward Historian Deployment](#) and data mover historian in [DataMover Historian Deployment](#)
2. The platforms maintain the connection with other platforms and agents can send to and receive messages from external platforms without having to establish connection directly. The deployment steps is described in [Multi Platform Router Deployment](#)
3. RabbitMQ has ready made plugins such as shovel and federation to connect to external brokers. This feature is leveraged to make connections to external platforms. This is described in [Multi Platform RabbitMQ Deployment](#)
4. A web based admin interface to authenticate multiple instances (ZeroMq or RabbitMQ) wanting to connect to single central instance is now available. The deployment steps is described in [Multi Platform Multi-Bus Deployment](#)
5. VOLTTRON Central is a platform management web application that allows platforms to communicate and to be managed from a centralized server. The deployment steps is described in [VOLTTRON Central Demo](#)

### 2.30.1 Assumptions

- *Data Collector* is the deployment box that has the drivers and is collecting data from devices which will be forwarded to a *VOLTTRON Central*.
- *Volttron Central (VC)* is the deployment box that has the historian which will save data from all Data Collectors to the central database.
- *VOLTTRON\_HOME* is assumed to the default on both boxes (*/home/<user>/volttron*).

---

**Note:** *VOLTTRON\_HOME* is the directory used by the platform for managing state and configuration of the platform and agents installed locally on the platform. Auth keys, certificates, the configuration store, etc. are stored in this directory by the platform.

---

### Forward Historian

The primary use case for the Forward Historian or Forwarder is to send data to another instance of VOLTTRON as if the data were live. This allows agents running on a more secure and/or more powerful machine to run analysis on data being collected on a potentially less secure/powerful board.

Given this use case, it is not optimized for batching large amounts of data when “live-ness” is not needed. For this use case, please see the *Data Mover Historian*.

---

**Note:** The Forward Historian is located within the **core** directory.

```
services/core/ForwardHistorian/
```

---

Forward Historian can be used to forward data between two ZMQ instances, two RMQ instances, or between ZMQ and RMQ instances. For Forward Historian to establish a successful connection to the destination VOLTTRON instance:

1. forward historian should be configured to connect and authenticate the destination instance, and
2. the remote instance should be configured to accept incoming connection from the forward historian

How we setup the above two depends on the message bus used in source instance and destination instance

### Setup for two ZMQ VOLTTRON instance or a ZMQ and RabbitMQ VOLTTRON instance

When forwarder is used between two ZeroMQ instances it relies on the CurveMQ authentication mechanism used by ZMQ based VOLTTRON. When the communication is between a ZeroMQ and RabbitMQ instance, the forward historian uses the proxy ZMQ router agent on the RabbitMQ instance and hence once again uses the CurveMQ authentication

**See also:**

For more details about VIP authentication in ZMQ based VOLTTRON refer to *VIP Authentication*

## Configuring Forwarder Agent

At a minimum, a forward historian's configuration should contain enough details to connect to and authenticate the remote destination. For this it needs

1. the destination's *VIP address* (*destination-vip*)
2. the public key of the destination server (*destination-serverkey*)

There are two ways to provide these information

### Minimum configuration: Option 1

Provide the needed information in the configuration file. For example

```
{  
  "destination-vip": "tcp://172.18.0.4:22916"  
  "destination-serverkey": "D3tIAPOFf7wS3787FgEOLjoPfXUT9rAGpv80ryloZGE"  
}
```

The destination server key can be found by running the following command on the **destination volttron instance**:

```
vctl auth serverkey
```

---

**Note:** The example above uses the local IP address, the IP address for your configuration should match the intended target

---

An example configuration with above parameters is available at *services/core/ForwardHistorian/config*.

### Minimum configuration: Option 2

If the destination volttron instance is web enabled then the forward historian can find the destination's vip address and public key using the destination's web discovery page. All web enabled volttron instances provide a **<instance's web address>/discovery/** page that provides the following server information

1. server key
2. vip address
3. instance name
4. RabbitMQ server's AMQP address (Only on RabbitMQ instances)
5. RabbitMQ server's CA cert (Only on RabbitMQ instances)

To forward data to a web enabled volttron instance, forwarder can configured with the destination's web address instead of destination's vip address and public key. For example

```
{  
  "destination-address": "https://centvolttron2:8443"  
}
```

An example configuration with above parameters is available at *services/core/ForwardHistorian/config\_web\_address*.

## Optional Configurations

The most common use case for a forwarder is to forward data to a remote historian. Therefore, forward historians' by default forward the default topics a historian subscribes to - devices, analysis, log, and record. However, a forward historian can be configured to forward any custom topic or disable forwarding devices, analysis, log and/or record topic data. For example

```
{
  "destination-address": "https://centvolttron2:8443",
  "custom_topic_list": ["heartbeat"],
  "capture_log_data": false
}
```

See [Configuration Options](#) for all available forward historian configuration

Since forward historian extends BaseHistorian all BaseHistorian's configuration can be added to forwarder. Please see [BaseHistorian Configurations](#) for the list of available BaseHistorian configurations

## Installation

Once we have our configuration file ready we can install the forwarder agent using the command

```
vctl install --agent-config <path to config file> services/core/ForwardHistorian
```

But before we start the agent we should configure the destination volttron instance to accept the connection from the forwarder.

## Configuring destination volttron instance

When a forwarder tries to connect to a destination volttron instance, the destination instance will check the ip address of the source and public key of connecting agent against its list of accepted peers. So before forwarder can connect to the destination instance, we should add these two details to the destination's auth.json file.

To do this we can use the command

```
vctl auth add --address <address of source instance where forwarder is installed> --
↪credentials <publickey of installed forwarder agent>
```

Only the address and credential keys are mandatory. You can add additional fields such as comments or user id for reference. In the above command address is the ip address of the source instance in which the forwarder is installed. Credentials is the public key of the installed forwarder agent. You can get the forwarder agent's public key by running the following command on the **source instance**

```
vctl auth publickey <agent uuid or name>
```

### See also:

For more details about VIP authentication in ZMQ based VOLTTRON refer to [VIP Authentication](#)

## Setup for two RabbitMQ VOLTTRON instances

RabbitMQ based VOLTTRON instances use x509 certificate based authentication. A forward historian that forwards data from one RMQ instance to another RMQ instance would need a x509 certificate that is signed by the destination volttron instance's root certificate for authentication. To obtain a signed certificate, on start, the forward historian creates a certificate signing request (CSR) and sends it to destination's instance for approval. An admin on the destination end, needs to login into the admin web interface and approve the request. On approval a certificate signed by the destination CA is returned to the forward historian and the forward historian can use this certificate for communication.

### See also:

For more details about CSR approval process see [Agent communication to Remote RabbitMQ instance](#) For an example CSR approval process see [VOLTTRON Central Multi-Platform Multi-Bus Demo](#)

## Forwarder Configuration

Since destination instance would have web enabled to approve the incoming CSR requests, forward historian can be configured with just the destination instance web address similar to ref:*Minimum configuration: Option 2*<config\_option\_2>

```
{
  "destination-address": "https://centvolttron2:8443"
}
```

On start, the forwarder makes Certificate signing request and retries periodically till the certificate is approved.

## Testing Forward Historian

Once forward historian is configured and installed and the destination is configured to accept incoming connection from the forwarder (either by adding to destination's auth.json as in the case of ZMQ or after CSR is approved in case of RMQ) forwarder can forward any message published to the configured set of topics and re-publish on the destination's messagebus.

## Testing with custom topic

1. Configure Forward historian to forward the topic heartbeat by adding the following to the forward historian's configuration

```
"custom_topic_list": ["heartbeat"],
```

2. If forwarder is not already running start the forwarder agent. If it is already running the configuration change should get picked up automatically in a few seconds.
3. If there are no other agent in the source volttron instance, install a listener agent that periodically publishes to the topic 'heartbeat'

```
vctl install examples/ListenerAgent
```

---

**Note:** As of VOLTTRON 8.0, all agents by default publish a heartbeat message periodically unless the agent explicitly opted out of it. So if you already have other installed agents that publish heartbeat message you don't have to add the listener agent

---

4. On the destination instance install a listener agent and tail the volttron log file. You should be able to see the listener or any other source agent's heartbeat message on the destination volttron's log file

### Testing with default topics

Forward historian by default forwards the default topics a historian subscribes to - devices, analysis, log, and record. On the source instance, we can install a platform driver and configure it with a fake device to publish data to the devices topic. Once the platform driver is started and data gets published to the devices topic, forwarder can re-publish these to the destination message bus

1. Configure and install forward historian as explained in the sections above
2. Configure destination to accept incoming connection as explained in the above sections
3. Shutdown source volttron instance

```
vctl shutdown --platform
```

4. On source install platform driver using the below vcfg command. When prompted, choose to configure a fake device for the platform driver

```
vcfg --agent platform_driver
```

Below is an example command with prompts

```
(volttron) [volttron@centvolttron1 myvolttron]$ vcfg --agent platform_driver

Your VOLTTRON_HOME currently set to: /home/volttron/vhomes/rmq_instance1

Is this the volttron you are attempting to setup? [Y]:
Configuring /home/volttron/git/myvolttron/services/core/PlatformDriverAgent.
['volttron', '-vv', '-l', '/home/volttron/vhomes/rmq_instance1/volttron.cfg.log']
Would you like to install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: n
```

5. Start source volttron instance

```
./start-volttron
```

6. Start platform driver and forwarder on source volttron instance
7. On the destination volttron instance install a listener agent and tail the volttron log. You should see the devices data periodically getting logged in the destination volttron instance.

### DataMover Historian

This guide describes how a DataMover historian can be used to transfer data from one VOLTTRON instance to another. The DataMover historian is different from Forward historian in the way it sends the data to the remote instance. It first batches the data and makes a RPC call to a remote historian instead of publishing data on the remote message bus instance. The remote historian then stores the data into it's database.

The walk-through below demonstrates how to setup DataMover historian to send data from one VOLTTRON instance to another.

## **VOLTTRON instance 1 sends data to platform historian on VOLTTRON instance 2**

As an example two VOLTTRON instances will be created and to send data from one VOLTTRON instance running a fake driver (subscribing to publishes from a fake device) and sending the values to a remote historian running on the second VOLTTRON instance.

### **VOLTTRON instance 1**

- `vctl shutdown -platform` (if the platform is already working)
- `volttron-cfg` (this helps in configuring the volttron instance [http://volttron.readthedocs.io/en/releases-4.1/core\\_services/control/VOLTTRON-Config.html](http://volttron.readthedocs.io/en/releases-4.1/core_services/control/VOLTTRON-Config.html))
  - Specify the *VIP address* of the instance: `tcp://127.0.0.1:22916`
  - Install Platform Driver Agent with a fake driver for the instance.
  - Install a listener agent so see the topics that are coming from the diver agent
- Then run the volttron instance by using the following command: `./start-volttron`

### **VOLTTRON instance 2**

- `vctl shutdown -platform` (if the platform is already working)
- `volttron-cfg` (this helps in configuring the volttron instance) [http://volttron.readthedocs.io/en/releases-4.1/core\\_services/control/VOLTTRON-Config.html](http://volttron.readthedocs.io/en/releases-4.1/core_services/control/VOLTTRON-Config.html)
  - Specify the VIP address of the instance: `tcp://127.0.0.2:22916`
  - Install a platform historian. `volttron-cfg` installs a default SQL historian.
- Start the VOLTTRON instance by using following command: `./start-volttron`

### **DataMover Configuration**

An example config file is available in `services/core/DataMover/config`. We need to update the *destination-vip*, *destination-serverkey*, and *destination-historian-identity* entries as per our setup.

---

**Note:** Here the topics from the driver on VOLTTRON instance 1 will be sent to instance 2.

- **destination-vip:** The VIP address of the volttron instance to which we need to send data. Example : `tcp://127.0.0.2:22916`
- **destination-serverkey:** The server key of remote VOLTTRON instance - Get the server key of VOLTTRON instance 2 and set *destination-serverkey* property with the server key

```
vctl auth serverkey
```

- **destination-historian-identity:** Identity of remote platform historian. Default is “platform.historian”
-



## Running DataMover Historian

- Install the DataMover historian on the VOLTRON instance 1

```
python scripts/install-agent.py -s services/core/DataMover -c services/core/DataMover/
↪config -i datamover --start
```

- Add the public key of the DataMover historian on VOLTRON instance 2 to enable authentication of the DataMover on VOLTRON instance 2.
  - Get the public key of the DataMover. Run the below command on instance 1 terminal.

```
vctl auth publickey --name datamoveragent-0.1
```

- Add the credentials of the DataMover historian in VOLTRON instance 2

```
vctl auth add --credentials <public key of data mover>
```

## Check data in SQLite database

To check if data is transferred and stored in the database of remote platform historian, we need to check the entries in the database. The default location of SQL database (if not explicitly specified in the config file) will be in the *data* directory inside the platform historian's installed directory within its *\$VOLTRON\_HOME*.

- Get the uuid of the platform historian. This can be found by running the `vctl status` on the terminal of instance 2. The first column of the data mover historian entry in the status table gives the first alphabet/number of the uuid.
- Go the *data* directory of platform historian's install directory. For example, */home/ubuntu/.platform2/agents/6292302c-32cf-4744-bd13-27e78e96184f/sqlhistorianagent-3.7.0/data*
- **Run the SQL command to see the data**

```
sqlite3 platform.historian.sqlite
select * from data;
```

- You will see similar entries

```
2020-10-27T15:07:55.006549+00:00|14|true
2020-10-27T15:07:55.006549+00:00|15|10.0
2020-10-27T15:07:55.006549+00:00|16|20
2020-10-27T15:07:55.006549+00:00|17|true
2020-10-27T15:07:55.006549+00:00|18|10.0
2020-10-27T15:07:55.006549+00:00|19|20
2020-10-27T15:07:55.006549+00:00|20|true
2020-10-27T15:07:55.006549+00:00|21|0
2020-10-27T15:07:55.006549+00:00|22|0
```

## Multi-Platform Between Routers

Multi-Platform between routers alleviates the need for an agent in one platform to connect to another platform directly in order for it to send/receive messages from the other platform. Instead with this new type of connection, connections to external platforms will be maintained by the platforms itself and agents do not have the burden to manage the connections directly. This guide will show how to connect three VOLTTRON instances with a fake driver running on VOLTTRON instance 1 publishing to topic with prefix="devices" and listener agents running on other 2 VOLTTRON instances subscribed to topic "devices".

- *Getting Started*
- *Multi-Platform Configuration*
- *Configuration and Authentication in Setup Mode*
- *Setup Configuration and Authentication Manually*
- *Start Platform driver on VOLTTRON instance 1*
- *Start Listener agents on VOLTTRON instance 2 and 3*
- *Stopping All the Platforms*

## Getting Started

Modify the subscribe annotate method parameters in the listener agent (examples/ListenerAgent/listener/agent.py in the VOLTTRON root directory) to include `all_platforms=True` parameter to receive messages from external platforms.

```
@PubSub.subscribe('pubsub', '')
```

to

```
@PubSub.subscribe('pubsub', 'devices', all_platforms=True)
```

or add below line in the *onstart* method

```
self.vip.pubsub.subscribe('pubsub', 'devices', self.on_match, all_platforms=True)
```

---

**Note:** If using the *onstart* method remove the `@PubSub.subscribe('pubsub', '')` from the top of the method.

---

After *installing VOLTTRON*, open three shells with the current directory the root of the VOLTTRON repository. Then activate the VOLTTRON environment and export the *VOLTTRON\_HOME* variable. The home variable needs to be different for each instance.

```
$ source env/bin/activate
$ export VOLTTRON_HOME=~/.volttron1
```

Run *vcfg* in all the three shells. This command will ask how the instance should be set up. Many of the options have defaults and that will be sufficient. Enter a different VIP address for each platform. Configure fake platform driver in the first shell and listener agent in second and third shell.

```

binbash 82d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ export VOLTRON_HOME=~/volttron1
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ volttron-cfg

Your VOLTRON_HOME currently set to: /home/volttron/.volttron1

Is this the volttron you are attempting to setup? [Y]:
What is the external instance ipv4 address? [tcp://127.0.0.1]:
What is the instance port for the vip address? [22916]:
Is this instance a volttron central? [N]:
Will this instance be controlled by volttron central? [Y]: n
Would you like to install a platform historian? [N]:
Would you like to install a master driver? [N]: y
Configuring /home/volttron/git/volttron-2/services/core/MasterDriverAgent
Install a fake device on the master driver? [N]: y
Should agent autostart? [N]: n
Would you like to install a listener agent? [N]: n
Finished configuration

You can now start the volttron instance.

If you need to change the instance configuration you can edit
the config file at /home/volttron/.volttron1/config
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

binbash 55d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ export VOLTRON_HOME=~/volttron2
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ volttron-cfg

Your VOLTRON_HOME currently set to: /home/volttron/.volttron2

Is this the volttron you are attempting to setup? [Y]:
What is the external instance ipv4 address? [tcp://127.0.0.1]: tcp://127.0.0.1
What is the instance port for the vip address? [22916]:
Is this instance a volttron central? [N]:
Will this instance be controlled by volttron central? [Y]: n
Would you like to install a platform historian? [N]:
Would you like to install a master driver? [N]: y
Configuring examples/ListenerAgent
Should agent autostart? [N]:
Finished configuration

You can now start the volttron instance.

If you need to change the instance configuration you can edit
the config file at /home/volttron/.volttron2/config
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

binbash 84d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ source env/bin/activate
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ export VOLTRON_HOME=~/volttron3
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ volttron-cfg

Your VOLTRON_HOME currently set to: /home/volttron/.volttron3

Is this the volttron you are attempting to setup? [Y]:
What is the external instance ipv4 address? [tcp://127.0.0.1]: tcp://127.0.0.1
What is the instance port for the vip address? [22916]:
Is this instance a volttron central? [N]:
Will this instance be controlled by volttron central? [Y]: n
Would you like to install a platform historian? [N]:
Would you like to install a master driver? [N]: y
Configuring examples/ListenerAgent
Should agent autostart? [N]:
Finished configuration

You can now start the volttron instance.

If you need to change the instance configuration you can edit
the config file at /home/volttron/.volttron3/config
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

```

## Multi-Platform Configuration

For each instance, specify the instance name in platform config file under its `VOLTRON_HOME` directory. If the platform supports web server, add the `bind-web-address` as well.

Here is an example,

Path of the config: `$VOLTRON_HOME/config`

```
[volttron]
vip-address = tcp://127.0.0.1:22916
instance-name = "platform1"
bind-web-address = http://127.0.0.1:8080
```

Instance name and bind web address entries added into each VOLTRON platform's config file is shown below.

```

binbash 83d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/volttron1/config
[volttron]
vip-address = tcp://127.0.0.1:22916
instance-name = "platform1"
bind-web-address = http://127.0.0.1:8080
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

binbash 84d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/volttron2/config
[volttron]
vip-address = tcp://127.0.0.2:22916
instance-name = "platform2"
bind-web-address = http://127.0.0.2:8080
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

binbash 84d52
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/volttron3/config
[volttron]
vip-address = tcp://127.0.0.3:22916
instance-name = "platform3"
bind-web-address = http://127.0.0.3:8080
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ █

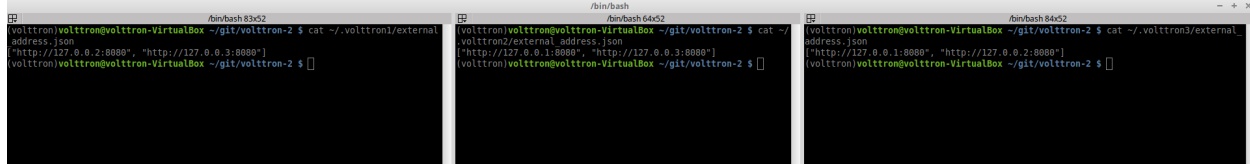
```

Next, each instance needs to know the VIP address, platform name and server keys of the remote platforms that it is connecting to. In addition, each platform has to authenticate or accept the connecting instances' public keys. We can do this step either by running VOLTRON in setup mode or configure the information manually.

## Configuration and Authentication in Setup Mode

**Note:** It is necessary for **each** platform to have a web server if running in setup mode

Add list of web addresses of remote platforms in `$VOLTRON_HOME/external_address.json`

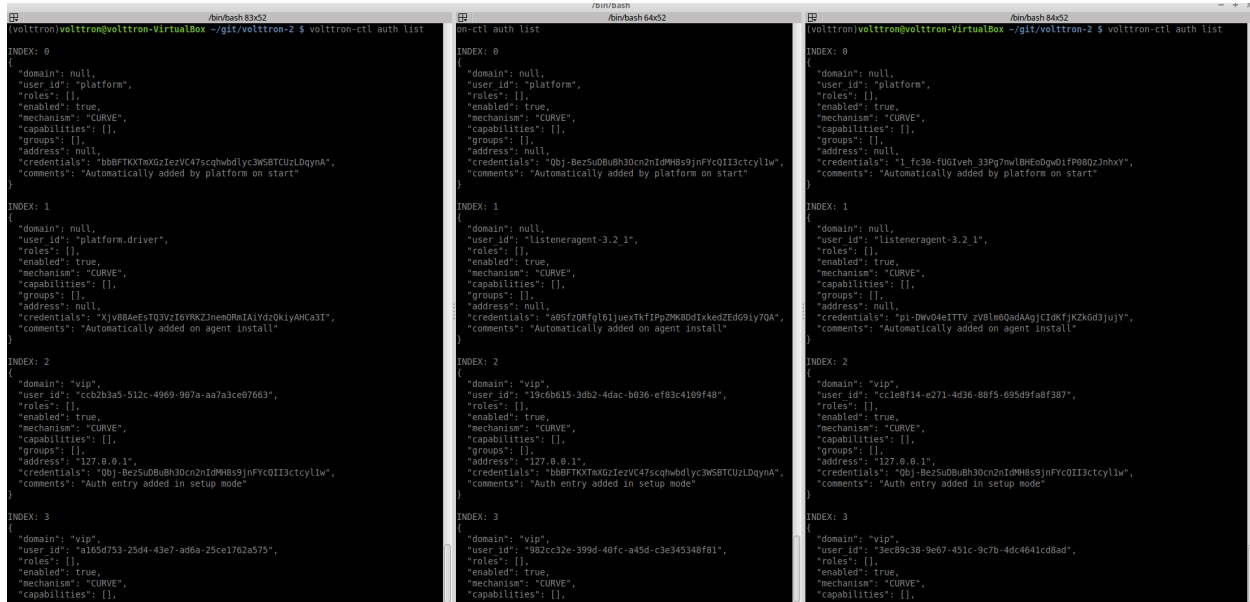


Start VOLTTRON instances in setup mode in the three terminal windows. The “-l” option in the following command tells VOLTTRON to log to a file. The file name should be different for each instance.

```
$ volttron -vv -l volttron.log --setup-mode > volttron.log 2>&1 &
```

A new auth entry is added for each new platform connection. This can be checked with below command in each terminal window.

```
$ vctl auth list
```



After all the connections are authenticated, we can start the instances in normal mode.

```
$ ./stop-volttron
$ ./start-volttron
```

## Setup Configuration and Authentication Manually

If you do not need web servers in your setup, then you will need to build the platform discovery config file manually. The config file should contain an entry containing VIP address, instance name and serverkey of each remote platform connection.

Name of the file: `external_platform_discovery.json`

Directory path: Each platform's VOLTRON\_HOME directory.

For example, since VOLTRON instance 1 is connecting to VOLTRON instance 2 and 3, contents of `external_platform_discovery.json` will be

```
{
  "platform2": { "vip-address": "tcp://127.0.0.2:22916",
    "instance-name": "platform2",
    "serverkey": "YFyIgXy2H7gIKC1x6uPMdDOB_i9lzfAPB1IgbxfXLGc"},
  "platform3": { "vip-address": "tcp://127.0.0.3:22916",
    "instance-name": "platform3",
    "serverkey": "hzU2bnlacAhZSaI0rI8a6XK_bqLSpA0JRK4jq8ttZxw"}
}
```

We can obtain the serverkey of each platform using below command in each terminal window:

```
$ vctl auth serverkey
```

Contents of `external_platform_discovery.json` of VOLTRON instance 1, 2, 3 is shown below.

```
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/.volttron1/external_platform_discovery.json
{"platform2":{"vip-address":"tcp://127.0.0.2:22916","instance-name":"platform2","serverkey":"Obj-BezSuDBuBh30cn2nIdMH8s9jnFYcQII3ctcyllw"},
"platform3":{"vip-address":"tcp://127.0.0.3:22916","instance-name":"platform3","serverkey":"1_fc30-fUGIveh_33Pg7nwlBHEoDgwDifP08QzJnhxY"}}
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/.volttron2/external_platform_discovery.json
{"platform3":{"vip-address":"tcp://127.0.0.3:22916","instance-name":"platform3","serverkey":"1_fc30-fUGIveh_33Pg7nwlBHEoDgwDifP08QzJnhxY"},
"platform1":{"vip-address":"tcp://127.0.0.1:22916","instance-name":"platform1","serverkey":"bbBFTKXTmXGzIezVC47scqhwdlyc3WSBTCUzLDqynA"}}
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ cat ~/.volttron3/external_platform_discovery.json
{"platform2":{"vip-address":"tcp://127.0.0.2:22916","instance-name":"platform2","serverkey":"Obj-BezSuDBuBh30cn2nIdMH8s9jnFYcQII3ctcyllw"},
"platform1":{"vip-address":"tcp://127.0.0.1:22916","instance-name":"platform1","serverkey":"bbBFTKXTmXGzIezVC47scqhwdlyc3WSBTCUzLDqynA"}}
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $ nano ~/.volttron3/external_platform_discovery.json
(volttron)volttron@volttron-VirtualBox ~/git/volttron-2 $
```

After this, you will need to add the server keys of the connecting platforms using the `vctl` utility. Type `vctl auth add` command on the command prompt and simply hit Enter to select defaults on all fields except **credentials**. Here, we can either add serverkey of connecting platform or type `./*` to allow ALL connections.

**Warning:** `./*` allows ALL agent and platform connections without authentication.

```
$ vctl auth add
domain []:
address []:
user_id []:
capabilities (delimit multiple entries with comma) []:
roles (delimit multiple entries with comma) []:
groups (delimit multiple entries with comma) []:
```

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```
mechanism [CURVE]:
credentials []: ./.*//
comments []:
enabled [True]:
added entry domain=None, address=None, mechanism='CURVE', credentials=u'./.*//', user_
↪id=None
```

For more information on authentication see [authentication](#).

Once the initial configuration are setup, you can start all the VOLTTRON instances in normal mode.

```
$ ./start-volttron
```

Next step is to start agents in each platform to observe the multi-platform PubSub communication behavior.

## Start Platform driver on VOLTTRON instance 1

If platform driver is not configured to auto start when the instance starts up, we can start it explicitly with this command.

```
$ vctl start --tag platform_driver
```

## Start Listener agents on VOLTTRON instance 2 and 3

If the listener agent is not configured to auto start when the instance starts up, we can start it explicitly with this command.

```
$ vctl start --tag listener
```

We should start seeing messages with prefix=”devices” in the logs of VOLTTRON instances 2 and 3.

The top row of screenshots shows the initial startup of VOLTTRON instances 2 and 3. The first terminal window shows the start of the platform driver agent, which is configured to start automatically. The second terminal window shows the start of the listener agent, which is also configured to start automatically. The third terminal window shows the start of the listener agent, which is configured to start automatically.

The bottom row of screenshots shows the logs of these agents receiving and processing messages from the platform driver. The first terminal window shows the platform driver agent sending a message to the listener agent, which is received and processed. The second terminal window shows the listener agent sending a message to the platform driver, which is received and processed. The third terminal window shows the listener agent sending a message to the platform driver, which is received and processed.

## Stopping All the Platforms

We can stop all the VOLTTTRON instances by executing below command in each terminal window.

```
$ vctl shutdown --platform
```

## Platform External Address Configuration

In the configuration file located in `$VOLTTTRON_HOME/config` add `vip-address=tcp://ip:port` for each address you want to listen on:

```
Example
vip-address=tcp://127.0.0.102:8182
vip-address=tcp://127.0.0.103:8083
vip-address=tcp://127.0.0.103:8183
```

**Note:** The config file is generated after running the `vcfg` command. The VIP-address is for the local platform, NOT the remote platform.

## Multi-platform RabbitMQ Deployment

With ZeroMQ based VOLTTTRON, multi-platform communication was accomplished in three different ways described below. Similar behavior can be accomplished with RabbitMQ-VOLTTTRON as well.

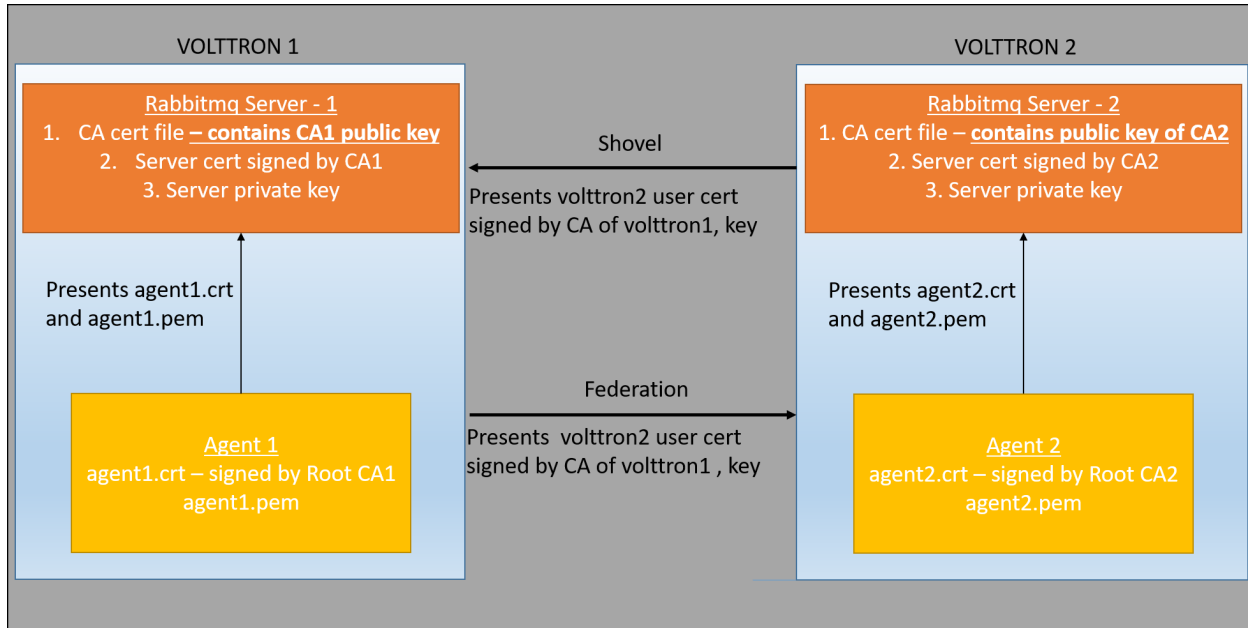
1. Direct connection to remote instance - Write an agent that would connect to a remote instance directly.
2. Special agents - Use special agents such as forward historian/data puller agents that would forward/receive messages to/from remote instances. In RabbitMQ-VOLTTTRON, we make use of the *Shovel Plugin* to achieve this behavior.
3. Multi-Platform RPC and PubSub - Configure *VIP* address of all remote instances that an instance has to connect to its `$VOLTTTRON_HOME/external_discovery.json` and let the router module in each instance manage the connection and take care of the message routing for us. In RabbitMQ-VOLTTTRON, we make use of the *Federation Plugin* to achieve this behavior.

## Terminology

For all the three different ways of setting up multiplatform links, we first need to identify the upstream server and downstream server. The upstream server is the node that is publishing some message of interest; we shall refer to this node as the publisher node. The downstream server is the node that will receive messages from the upstream server; we shall refer to this node as the subscriber node. Note that upstream server & publisher node and downstream server & subscriber node will be used interchangeably for the rest of this guide.

## Multi-Platform Communication With RabbitMQ SSL

RabbitMQ-VOLTTRON uses SSL based authentication for connection to the platform. This feature is extended to connection between multiple VOLTTRON platforms. The below figure shows the 2 remote VOLTTRON platforms can establish authentication connection to the other.



Suppose there are two virtual machines (VOLTTRON1 and VOLTTRON2) running single instances of RabbitMQ; VOLTTRON1 and VOLTTRON2 want to talk to each other via the federation or shovel plugins. For shovel/federation to have authenticated connection to the remote instance, it needs to have its public certificate signed by the remote instance's CA. So as part of the shovel or federation creation steps, a certificate signing request is made to the remote instance. The admin of the remote instance should be ready to accept/reject such a request through VOLTTRON's admin web interface. To facilitate this process, the VOLTTRON platform exposes a web-based server API for requesting, listing, approving, and denying certificate requests. For more detailed description, refer to [Agent communication to Remote RabbitMQ instance](#). After the CSR request is accepted, an authenticated shovel/federation connection can be established.

### Using the Federation Plugin

**Note:** Please make sure that a single instance of RabbitMQ VOLTTRON is setup before attempting to create a federation link [platform installation steps for RMQ](#)

Connecting multiple VOLTTRON instances can be done using the federation plugin. To create a RabbitMQ federation, we have to configure the downstream volttron instance to create federated exchange. A federated exchange links to other exchanges. In this case, the downstream federated exchange links to the upstream exchange. Conceptually, messages published to the upstream exchanges are copied to the federated exchange, as though they were published directly to the federated exchange.

Path: `$VOLTRON_HOME/rabbitmq_federation_config.yml`

```
# Mandatory parameters for federation setup
federation-upstream:
```

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```

volttron4: # hostname of upstream server
port: '5671'
virtual-host: volttron4
certificates:
  csr: true
  private_key: "path to private key" # For example, /home/volttron/vhome/test_
↳ fed/certificates/private/volttron1.federation.pem
  public_cert: "path to public cert" # For example, /home/volttron/vhome/test_
↳ fed/certificates/federation/volttron2.volttron1.federation.crt
  remote_ca: "path to CA cert" # For example, /home/volttron/vhome/test_fed/
↳ certificates/federation/volttron2_ca.crt
  federation-user: volttron4.federation #<local instance name>.federation
volttron5: # hostname of upstream server
port: '5671'
virtual-host: volttron5
certificates:
  csr: true
  private_key: "path to private key"
  public_cert: "path to public cert"
  remote_ca: "path to CA cert"
  federation-user: volttron5.federation #<local instance name>.federation

```

To setup federation on the VOLTTTRON instance, run the following command on the downstream server:

```

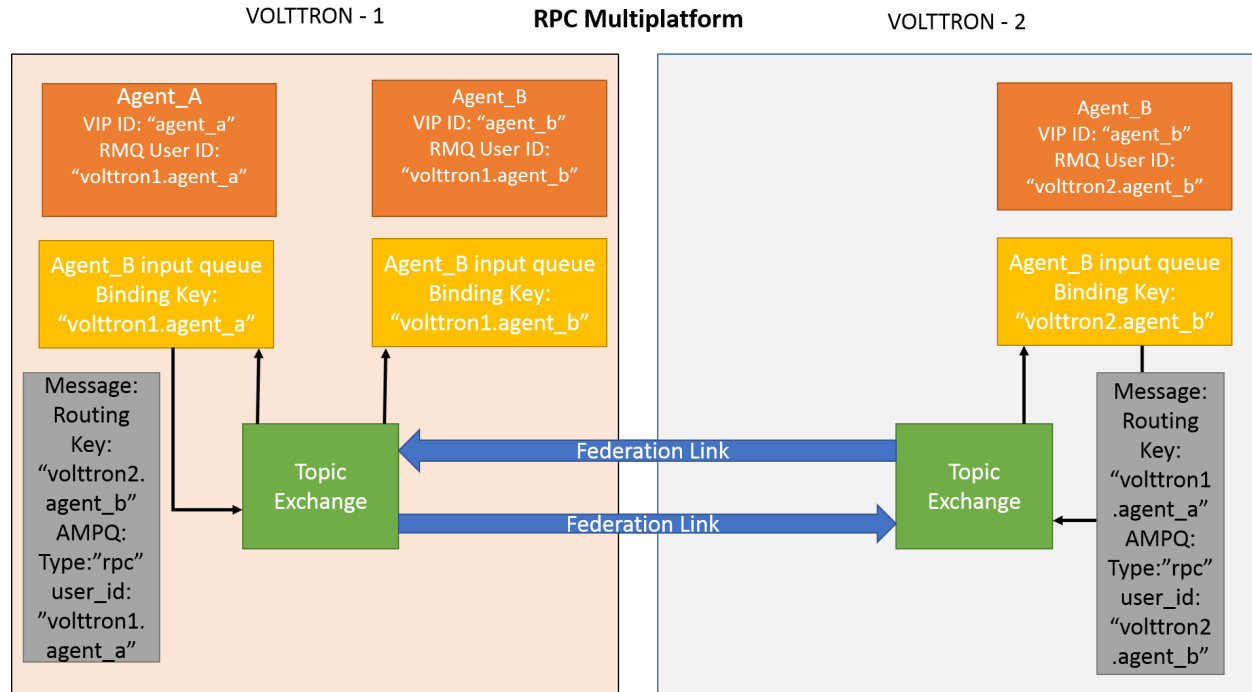
vcfg rabbitmq federation [--config optional path to rabbitmq_federation_config.yml] [-
↳ -max-retries optional maximum CSR retry attempt]

```

This establishes federation links to upstream servers. Here the default maximum retry attempt is set to 15. Once a federation link to the upstream server is established on the downstream server, the messages published on the upstream server become available to the downstream server as if it were published locally.

## Multi-Platform RPC With Federation

For multi-platform RPC communication, federation links need to be established on both the VOLTTTRON nodes. Once the federation links are established, RPC communication becomes fairly simple.



Consider Agent A on VOLTTRON instance "volttron1" on host "host\_A" wants to make RPC call to Agent B on VOLTTRON instance "volttron2" on host "host\_B".

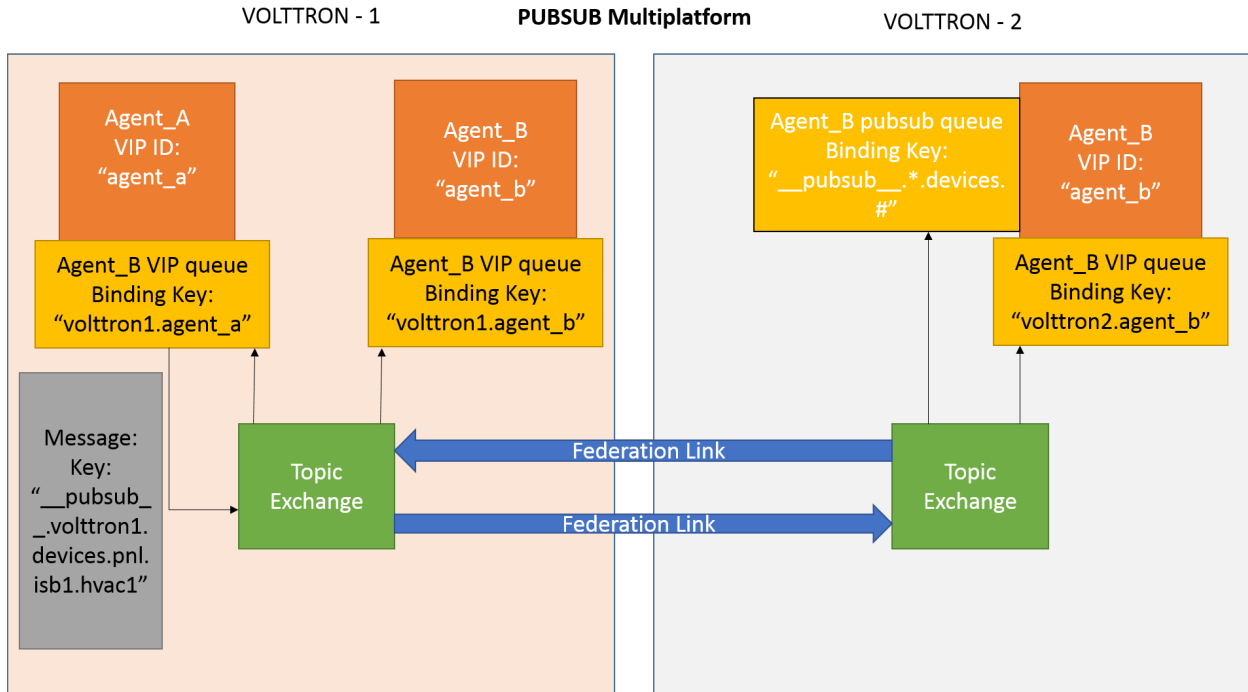
1. Agent A makes RPC call.

```
kwargs = {"external_platform": self.destination_instance_name}
agent_a.vip.rpc.call("agent_b", set_point, "point_name", 2.5, **kwargs)
```

2. The message is transferred over federation link to VOLTTRON instance "volttron2" as both the exchanges are made *federated*.
3. The RPC subsystem of Agent B calls the actual RPC method and gets the result. It encapsulates the message result into a VIP message object and sends it back to Agent A on VOLTTRON instance "volttron1".
4. The RPC subsystem on Agent A receives the message result and gives it to the Agent A application.

### Multi-Platform PubSub With Federation

For multi-platform PubSub communication, it is sufficient to have a single federation link from the downstream server to the upstream server. In case of bi-directional data flow, two links have to be established in both the directions.



Consider Agent B on VOLTTRON instance “volttron2” on host “host\_B” which wants to subscribe to messages from VOLTTRON instance “volttron2” on host “host\_B”. First, a federation link needs to be established from “volttron2” to “volttron1”.

1. Agent B makes a subscribe call:

```
agent_b.vip.subscribe.call("pubsub", prefix="devices", all_platforms=True)
```

2. The PubSub subsystem converts the prefix to `__pubsub__.*.devices.#`. Here, `*` indicates that agent is subscribing to the `devices` topic from all VOLTTRON platforms.
3. A new queue is created and bound to VOLTTRON exchange with the above binding key. Since the VOLTTRON exchange is a *federated exchange*, any subscribed message on the upstream server becomes available on the federated exchange and Agent B will be able to receive it.
4. Agent A publishes message to topic `devices/pnl/isb1/hvac1`
5. The PubSub subsystem publishes this message on its VOLTTRON exchange.
6. The message is received by the Pubsub subsystem of Agent A via the federation link.

## Installation Steps

1. Setup two VOLTTRON instances using the instructions at [platform installation steps for RMQ](#). **Please note that each instance should have a unique instance name and should be running on a machine/VM that has a unique host name.**
2. Identify upstream servers (publisher nodes) and downstream servers (collector nodes). To create a RabbitMQ federation, we have to configure upstream servers on the downstream server and make the VOLTTRON exchange “federated”.
  - a. On the downstream server (collector node)

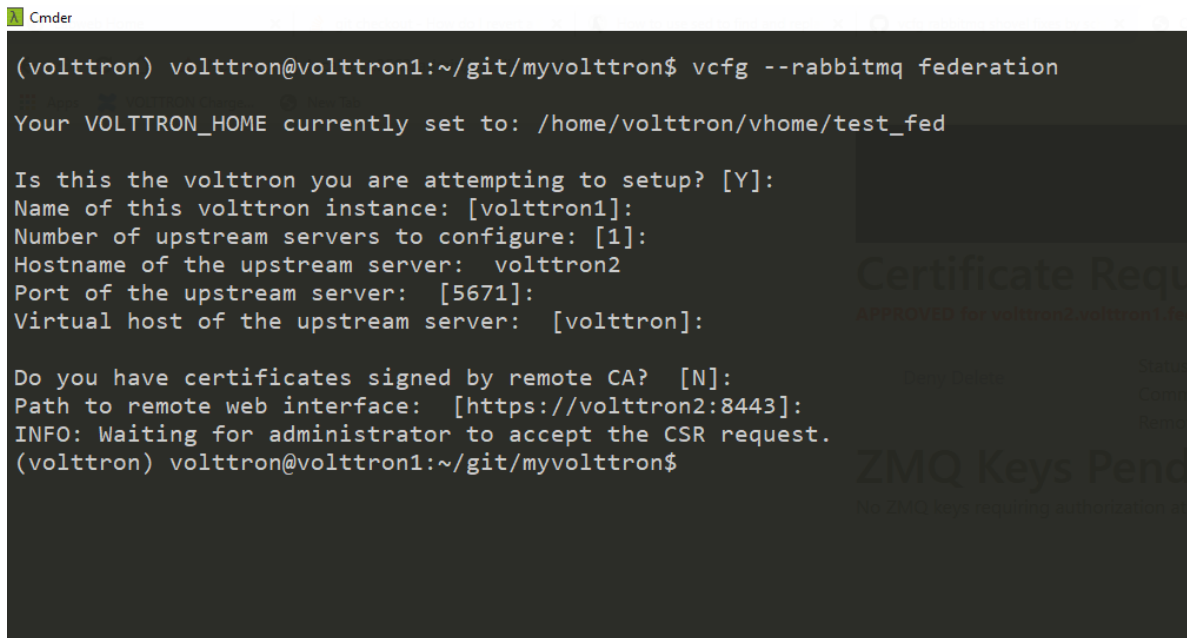
```
vcfg rabbitmq federation [--config optional path to rabbitmq_federation_config.yml
containing the details of the upstream hostname, port and vhost.] [--max-retries_
↪ optional maximum CSR retry attempt]
```

Example configuration for federation is available in `examples/configurations/rabbitmq/rabbitmq_federation_config.yml`

If no config file is provided, the script will prompt for hostname (or IP address), port, and vhost of each upstream node you would like to add and certificates for connecting to upstream server. For bi-directional data flow, we will have to run the same script on both the nodes.

- b. If no config file is provided and certificates for connecting to upstream server have to be generated afresh, then the upstream server should be web enabled and admin should be ready to accept/reject incoming requests. Please refer to [Multiple Platform Multiple Bus connection](#) on how to enable web feature and accept/reject incoming authentication requests. Below image shows steps to follow to create a federation link from downstream instance “volttron1” to upstream instance “volttron2”.

On downstream server (collector node),



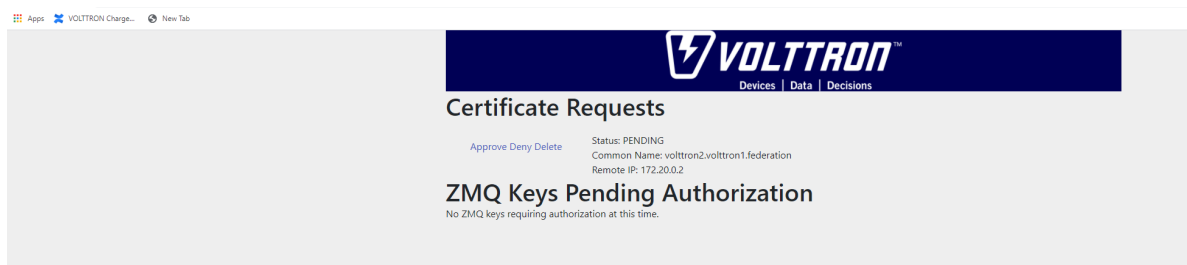
```
Cmder
(volttron) volttron@volttron1:~/git/myvolttron$ vcfg --rabbitmq federation

Your VOLTTRON_HOME currently set to: /home/volttron/vhome/test_fed

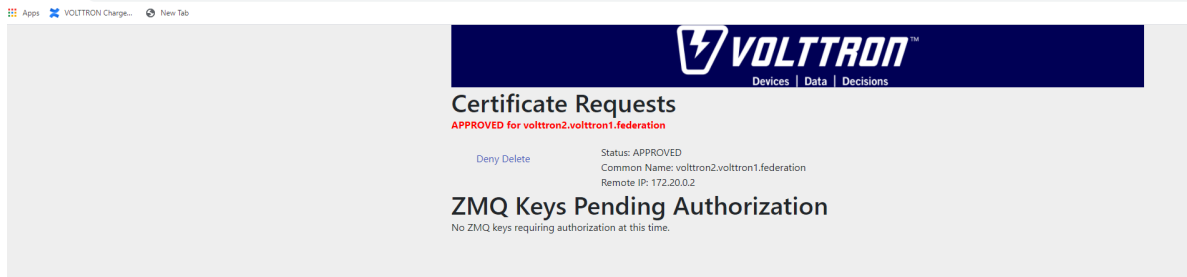
Is this the volttron you are attempting to setup? [Y]:
Name of this volttron instance: [volttron1]:
Number of upstream servers to configure: [1]:
Hostname of the upstream server: volttron2
Port of the upstream server: [5671]:
Virtual host of the upstream server: [volttron]:

Do you have certificates signed by remote CA? [N]:
Path to remote web interface: [https://volttron2:8443]:
INFO: Waiting for administrator to accept the CSR request.
(volttron) volttron@volttron1:~/git/myvolttron$
```

On upstream server (publisher node), Login to “<https://volttron2:8443/index.html>” in a web browser. You will see incoming CSR request from “volttron1” instance.



Accept the incoming CSR request from “volttron1” instance.



You can also find and accept the pending CSR via the command line, using the `vctl auth remote` sub-commands. First list the pending certs and credentials.

```
vctl auth remote list
```

USER_ID	ADDRESS	STATUS
voltage2.voltage1.federation	172.20.0.2	PENDING

Approve the pending CSR using the `approve` command.

```
vctl auth remote approve voltage2.voltage1.federation
```

Run the `list` command again to verify that the CSR has been approved.

USER_ID	ADDRESS	STATUS
voltage2.voltage1.federation	172.20.0.2	APPROVED

## 5. Test the federation setup.

- a. On the downstream server run a listener agent which subscribes to messages from all platforms

```
vctl install examples/ListenerAgent --agent-config examples/ListenerAgent/
↩config --start
```

- b. Install platform driver, configure fake device on upstream server and start volttron and platform driver.

```
./stop-volttron
vcfg --agent platform_driver
./start-volttron
vctl start --tag platform_driver
```

- c. Verify that the listener agent in downstream VOLTRON instance is able to receive the messages. The downstream volttron instance's `volttron.log` should display device data scrapped by platform driver agent in upstream volttron instance.
6. Open ports and https service if needed. On Redhat based systems, ports used by RabbitMQ (defaults to 5671, 15671 for SSL, 5672 and 15672 otherwise) might not be open by default. Please contact system administrator to get ports opened on the downstream server.

Following are commands used on centos 7.

```
sudo firewall-cmd --zone=public --add-port=15671/tcp --permanent
sudo firewall-cmd --zone=public --add-port=5671/tcp --permanent
sudo firewall-cmd --reload
```

## 7. How to remove federation link

- a. Using the management web interface

Log into management web interface using downstream server's admin username. Navigate to admin tab and then to federation management page. The status of the upstream link will be displayed on the page. Click on the upstream link name and delete it.

- b. Using “vctl” command on the upstream server.

```
vctl rabbitmq list-federation-links
NAME                                STATUS
upstream-volttron2-volttron        running
```

Copy the upstream link name and run the below command to remove it.

```
vctl rabbitmq remove-federation-links upstream-volttron2-volttron
Do you wish to delete certificates as well? [Y/n] y
Removing certificate paths from VOLTTRON_HOME and from the config_
↪file
```

**Note:** These commands removes the federation parameter from RabbitMQ, deletes the certificates from VOLTTRON\_HOME and certificate entries from rabbitmq\_federation\_config.yml on the publisher node. The remote admin must delete the remote certificates through admin web interface. If you need to rerun the federation command again for the same setup, then a fresh CSR request is made to the remote instance. The remote admin has to approve the new request as before.

## Using the Shovel Plugin

**Note:** Please make sure that a single instance of RabbitMQ VOLTTRON is setup before attempting to create a shovel link *platform installation steps for RMQ*.

Shovels act as well-written client applications which move messages from a source to a destination broker. The below configuration shows how to setup a shovel to forward PubSub messages or perform multi-platform RPC communication from a local (i.e. publisher node) to a remote instance (i.e. subscriber node). The configuration expects *hostname*, *port* and *virtual host* values of the remote instance. It also needs certificates, namely private certs, public certificate signed by remote instance, and remote CA certificate.

Path: \$VOLTTRON\_HOME/rabbitmq\_shovel\_config.yml

```
# Mandatory parameters for shovel setup
shovel:
  volttron2: # remote hostname
    https-port: 8443
    port: 5671
    shovel-user: volttron1.shovelvolttron2 #<instance_name>.<unique name>
    virtual-host: volttron
    certificates:
      private_cert: "path to private cert" # For example, /home/volttron/vhome/
      ↪test_shovel/certificates/private/volttron1.shovelvolttron2.pem
      public_cert: "path to public cert" # For example, /home/volttron/vhome/
      ↪test_shovel/certificates/shovels/volttron2.volttron1.shovelvolttron2.crt
      remote_ca: "path to CA cert" # For example, /home/volttron/vhome/test_
      ↪shovel/certificates/shovels/volttron2_ca.crt
      # Configuration to forward pubsub topics
    pubsub:
```

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```

# Identity of agent that is publishing the topic
platform.driver:
    # Topic pattern to be forwarded
    - devices

# Configuration to make remote RPC calls
rpc:
    # Remote instance name
    volttron2:
        # List of pair of agent identities (local caller, remote callee)
        - [scheduler, platform.actuator]

```

To forward PubSub messages, the topic and agent identity of the publisher agent is needed. To perform RPC, the instance name of the remote instance and agent identities of the local agent and remote agent are needed.

To configure the VOLTRON instance to setup shovel, run the following command on the local instance.

```

vcfg rabbitmq shovel [--config optional path to rabbitmq_shovel_config.yml] [--max-
↳retries optional maximum CSR retry attempt]

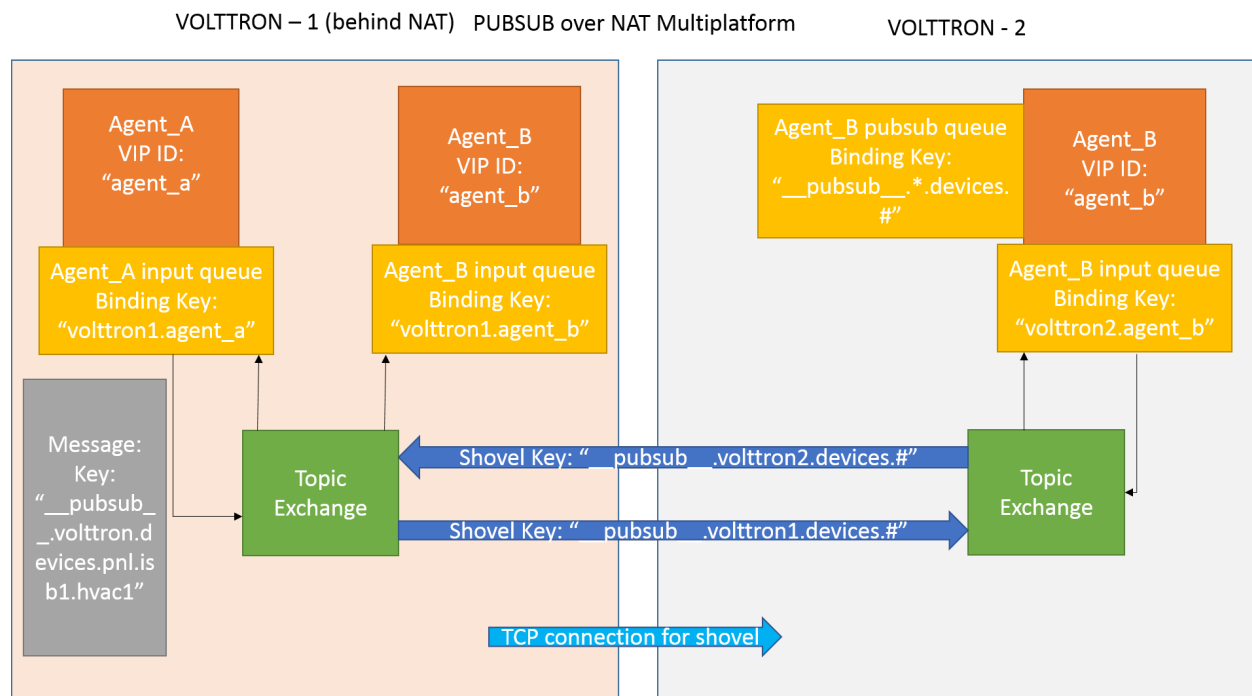
```

This sets up a shovel that forwards messages (either PubSub or RPC) from a local exchange to a remote exchange.

## Multi-Platform PubSub With Shovel

After the shovel link is established for Pubsub, the below figure shows how the communication happens.

**Note:** For bi-directional pubsub communication, shovel links need to be created on both the nodes. The “blue” arrows show the shovel binding key. The pubsub topic configuration in `$VOLTRON_HOME/rabbitmq_shovel_config.yml` gets internally converted to the shovel binding key: “`__pubsub__.<local instance name>.<actual topic>`”.



Now consider a case where shovels are setup in both the directions for forwarding “devices” topic.

1. Agent B makes a subscribe call to receive messages with topic “devices” from all connected platforms.

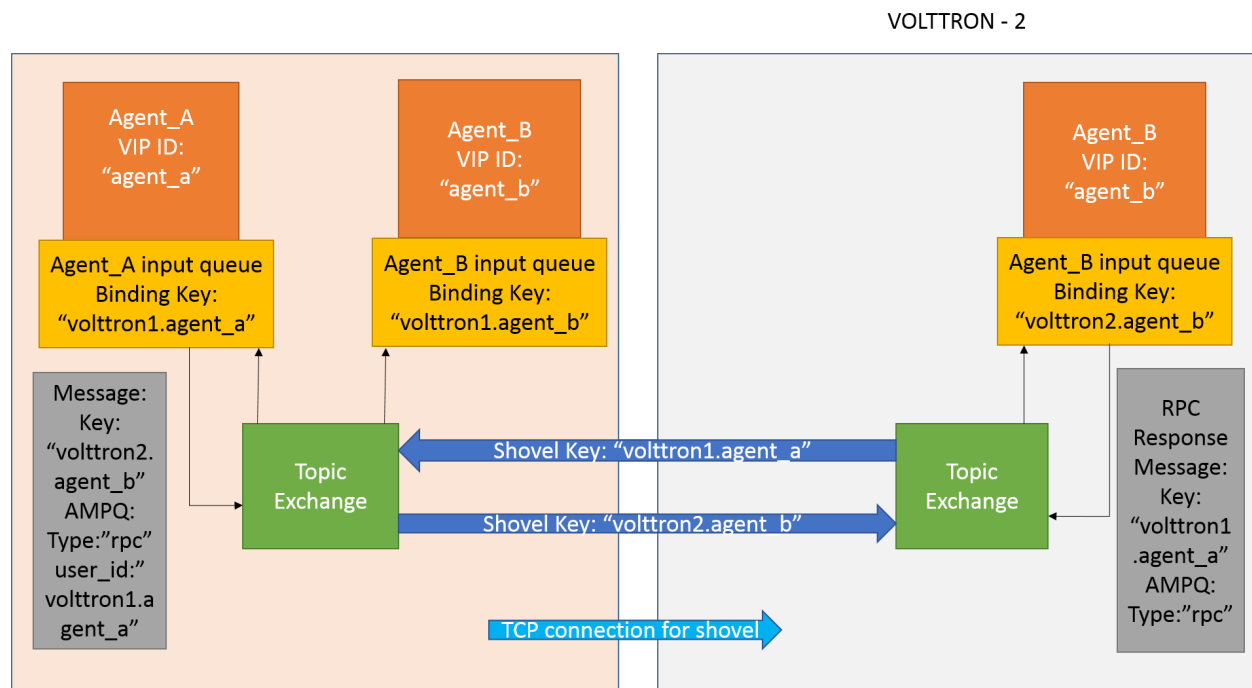
```
agent_b.vip.subscribe.call("pubsub", prefix="devices", all_platforms=True)
```

2. The PubSub subsystem converts the prefix to `__pubsub__.*.devices.#`. The `*` indicates that the agent is subscribing to the “devices” topic from all the VOLTTRON platforms.
3. A new queue is created and bound to VOLTTRON exchange with above binding key.
4. Agent A publishes message to topic `devices/pnnl/isb1/hvac1`
5. PubSub subsystem publishes this message on its VOLTTRON exchange.
6. Because of the shovel link from VOLTTRON instance “volttron1” to “volttron2”, the message is forwarded from VOLTTRON exchange “volttron1” to “volttron2” and is picked up by Agent B on “volttron2”.

## Multi-Platform RPC With Shovel

After the shovel link is established for multi-platform RPC, the below figure shows how the RPC communication happens.

**Note:** It is mandatory to have shovel links in both directions because RPC is a request-response type of communication. We will need to set the agent identities for caller and callee in the `$VOLTTRON_HOME/rabbitmq_shovel_config.yml`. The “blue” arrows show the resulting the shovel binding key.



Consider Agent A on VOLTTRON instance “volttron1” on host “host\_A” wants to make RPC call on Agent B on VOLTTRON instance “volttron2” on host “host\_B”.

1. Agent A makes RPC call:



```
kwargs = {"external_platform": self.destination_instance_name}
agent_a.vip.rpc.call("agent_b", set_point, "point_name", 2.5, **kwargs)
```

2. The message is transferred over shovel link to VOLTTRON instance “volttron2”.
3. The RPC subsystem of Agent B calls the actual RPC method and gets the result. It encapsulates the message result into a VIP message object and sends it back to Agent A on VOLTTRON instance “volttron1”.
4. The RPC subsystem on Agent A receives the message result and gives it to Agent A’s application.

## Installation Steps for Pubsub Communication

For multi-platform communication over shovel, we need the connecting instances to trust each other. As part of the shovel creation process, a certificate signing request is made to the remote instance. The admin of the remote instance has to accept or reject such a request through VOLTTRON admin web interface. If accepted, a bundle containing a certificate signed by the remote CA is sent as a response back to the local instance. Subsequently, shovel connection is established with these certificates. If the user already has certificates signed by the remote CA, then that will be used for connection. Otherwise, the user can run the command `vcfg rabbitmq shovel` and it will prompt the user to make a CSR request as part of shovel setup.

1. Setup two VOLTTRON instances using the steps described in installation section. Please note that each instance should have a unique instance name.

2. Identify the instance that is going to act as the “publisher” instance. Suppose “volttron1” instance is the “publisher” instance and “volttron2” instance is the “subscriber” instance. Then we need to create a shovel on “volttron1” to forward messages matching certain topics to remote instance “volttron2”.

- a. On the publisher node,

```
vcfg rabbitmq shovel [--config optional path to rabbitmq_shovel_
→config.yml] [--max-retries optional maximum CSR retry attempt]
```

`rabbitmq_shovel_config.yml` should contain the details of the remote hostname, port, vhost, certificates for connecting to remote instance and list of topics to forward. Example configuration for shovel is available in `examples/configurations/rabbitmq/rabbitmq_shovel_config.yml`

For this example, let’s set the topic to “devices”

If no config file is provided, the script will prompt for hostname (or IP address), port, vhost, certificates for connecting to remote instance and list of topics for each remote instance you would like to add. For bi-directional data flow, we will have to run the same script on both the nodes.

- b. If no config file is provided and certificates for connecting to remote instance have to be generated afresh, then the remote instance should be web enabled and admin should be ready to accept/reject incoming requests. Please refer to [Multiple Platform Multiple Bus connection](#) on how to enable web feature and accept/reject incoming authentication requests. Below image shows steps to follow to create a shovel to connect from “volttron1” to “volttron2” to publish “devices” topic from “volttron1” to “volttron2”.

On publisher node,

```
(volttron) volttron@volttron1:~/git/370_volttron$ vcfg rabbitmq shovel

Your VOLTTRON_HOME currently set to: /home/volttron/vhome/test_shovel

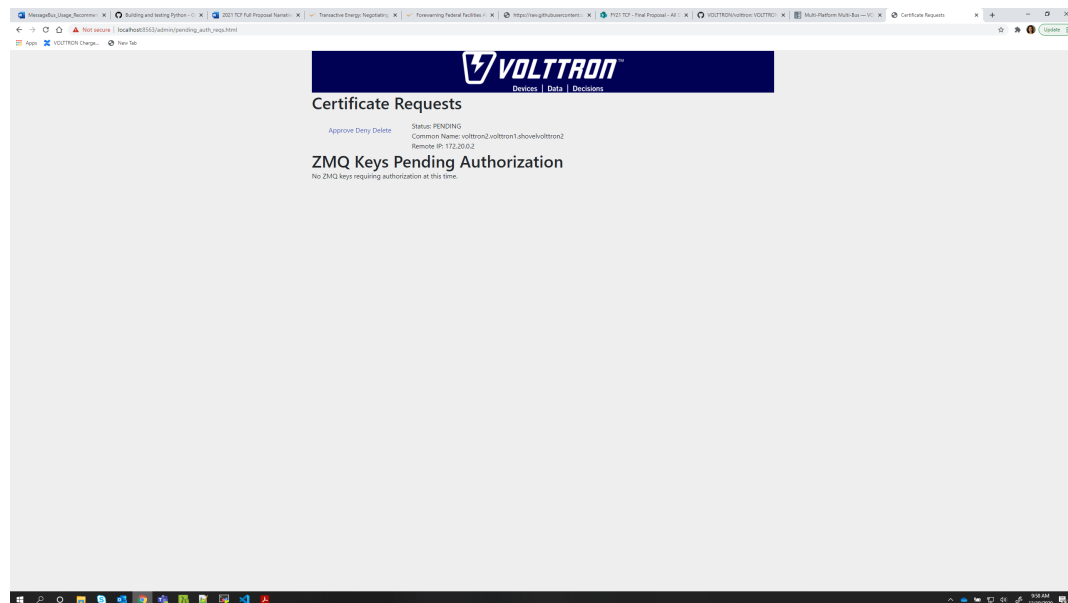
Is this the volttron you are attempting to setup? [Y]:
Name of this volttron instance: [volttron1]:
Number of destination hosts to configure: [1]:
Hostname of the destination server: volttron2
Port of the destination server: [5671]:
Virtual host of the destination server: [volttron]:
Name for the shovel user: shovelvolttron2

Do you have certificates signed by remote CA? [N]:
Path to remote web interface: [https://volttron2:8443]:
INFO: Waiting for administrator to accept the CSR request.

Do you want shovels for PUBSUB communication? [N]: y
VIP identity of the agent publishing the topic: platform.driver
List of PUBSUB topics to publish to this remote instance (comma seperated) devices

Do you want shovels for RPC communication? [N]:
Setup for shovel with name: shovel-volttron2-devices is completed. Status is: running
(volttron) volttron@volttron1:~/git/370_volttron$ |
```

On subscriber node, login to “<https://volttron2:8443/index.html>” in a web browser. You will see an incoming CSR request from “volttron1” instance.



Accept the incoming CSR request from “volttron1” instance.

As before, you can find and accept the pending CSR via the command line, using the `vtctl auth remote` sub-commands.

First list the pending certs and credentials.

```
vtctl auth remote list
```

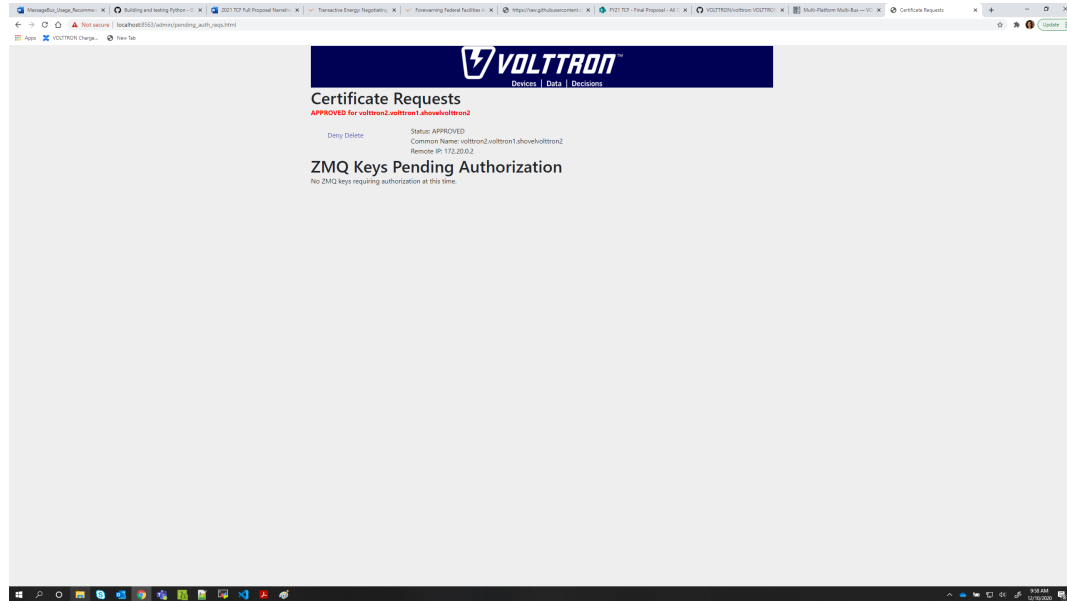
USER_ID	ADDRESS	STATUS
volttron2.volttron1.shovelvolttron2	172.20.0.2	PENDING

Approve the pending CSR using the `approve` command.

```
vctl auth remote approve volttron2.volttron1.shovelvolttron2
```

Run the list command again to verify that the CSR has been approved.

USER_ID	ADDRESS	STATUS
volttron2.volttron1.shovelvolttron2	172.20.0.2	APPROVED



4. Test the shovel setup.
  - a. Start VOLTTRON on publisher and subscriber nodes.
  - b. On the publisher node, install and start a platform driver agent that publishes messages related to a fake device.

```
./stop-volttron
vcfg --agent platform_driver
./start-volttron
vctl start --tag platform_driver
```

- c. On the subscriber node, run a listener agent which subscribes to messages from all platforms.
  - Open the file `examples/ListenerAgent/listener/agent.py`. Search for `@PubSub.subscribe('pubsub', '')` and replace that line with `@PubSub.subscribe('pubsub', 'devices', all_platforms=True)`
  - Install the listener

```
vctl install examples/ListenerAgent --agent-config examples/
↳ ListenerAgent/config --start
```

- d. Verify listener agent in downstream VOLTTRON instance can receive the messages. The downstream volttron instance's `volttron.log` should display device data scrapped by the platform driver agent in the upstream volttron instance.
5. How to remove the shovel setup.
    - a. On the subscriber node, remove the shovel on using the management web interface

Log into management web interface using publisher instance’s admin username. Navigate to admin tab and then to shovel management page. The status of the shovel will be displayed on the page. Click on the shovel name and delete the shovel.

- b. On the publisher node, run the following “vctl” commands:

```
vctl rabbitmq list-shovel-links
NAME                                STATUS  SRC_URI                                DEST_
↔URI                                SRC_EXCHANGE_KEY

shovel-volttron2-devices  running  amqps://volttron1:5671/volttron  ↵
↔amqps://volttron2:5671/volttron  __pubsub__.volttron1.devices.#
```

Copy the shovel name and run following command to remove it.

```
vctl rabbitmq remove-shovel-links shovel-volttron2-devices
Do you wish to delete certificates as well? [Y/n] y
Removing certificate paths from VOLTTRON_HOME and from the config file
```

---

**Note:** These commands removes the shovel parameter from RabbitMQ, deletes the certificates from VOLTTRON\_HOME and certificate entries from rabbitmq\_shovel\_config.yml on the publisher node. The remote admin must delete the remote certificates through admin web interface. If you need to rerun the federation command again for the same setup, then a fresh CSR request is made to the remote instance. The remote admin has to approve the new request as before.

---

## Multi-Platform Multi-Bus

This guide describes the setup process for a multi-platform connection that has a combination of *ZeroMQ* and *RabbitMQ* instances. For this example, we want to use the Forwarder to pass device data from two VOLTTRON instance to a single “central” instance for storage. It will also have a Volttron Central agent running on the “central” instance and Volttron Central Platform agents on all 3 instances and connected to “central” instance to provide operational status of it’s instance to the “central” instance. For this document “node” will be used interchangeably with VOLTTRON instance. The authentication of remote connections can be performed either using admin web interface or using command line interface. We will demonstrate both the approaches.

## Node Setup

For this example we will have two types of nodes; a data collector and a central node. Each of the data collectors will have different message buses (VOLTTRON supports both RabbitMQ and ZeroMQ). The nodes will be configured as in the following table.

Table 32: Node Configuration

	Central	Node-ZMQ	Node-RMQ
Node Type	Central	Data Collector	Data Collector
Platform Driver		yes	yes
Forwarder		yes	yes
SQL Historian	yes		
Volttron Central	yes		
Volttron Central Platform	yes	yes	yes
Exposes RMQ Port	yes		
Exposes ZMQ Port	yes		
Exposes HTTPS Port	yes		

The goal of this is to be able to see the data from Node-ZMQ and Node-RMQ in the Central SQL Historian and on the trending charts of Volttron Central.

## Virtual Machine Setup

The first step in creating a VOLTTRON instance is to make sure the machine is ready for VOLTTRON. Each machine should have its hostname setup. For this walk-through, the hostnames “central”, “node-zmq” and “node-rmq” will be used.

For Central and Node-RMQ follow the instructions [platform installation steps for RMQ](#). For Node-ZMQ use [Platform Installation steps for ZeroMQ](#).

## Instance Setup

The following conventions/assumptions are made for the rest of this document:

- Commands should be run from the VOLTTRON root
- Default values are used for VOLTTRON\_HOME(\$HOME/.volttron), *VIP* port (22916), HTTPS port (8443), RabbitMQ ports (5671 for AMQPs and 15671 for RabbitMQ management interface). If using different *VOLTTRON\_HOME* or ports, please replace accordingly.
- Replace central, node-zmq and node-rmq with your own hostnames.
- user will represent your current user.

The following will use *vcfg* (volttron-cfg) to configure the individual platforms.

## Central Instance Setup

**Note:** This instance must have been bootstrapped using `--rabbitmq` see [RabbitMq installation instructions](#).

Next step would be to configure the instance to have a web interface to accept/deny incoming certificate signing requests from other instances. Additionally, we will need to install a Volttron Central agent, Volttron Central Platform agent, SQL historian agent and a Listener agent. The following shows an example command output for this setup.

```
(volttron)user@central:~/volttron$ vcfg

Your VOLTTRON_HOME currently set to: /home/user/.volttron

Is this the volttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]: rmq
Name of this volttron instance: [volttron1]: central
RabbitMQ server home: [/home/user/rabbitmq_server/rabbitmq_server-3.9.7]:
Fully qualified domain name of the system: [central]:
Would you like to create a new self signed root CA certificate for this instance: [Y]:

Please enter the following details for root CA certificate
  Country: [US]:
  State: WA
  Location: Richland
  Organization: PNNL
  Organization Unit: volttron
Do you want to use default values for RabbitMQ home, ports, and virtual host: [Y]:
2020-04-13 13:29:36,347 rmq_setup.py INFO: Starting RabbitMQ server
2020-04-13 13:29:46,528 rmq_setup.py INFO: Rmq server at /home/user/rabbitmq_server/
↳rabbitmq_server-3.9.7 is running at
2020-04-13 13:29:46,554 volttron.utils.rmq_mgmt DEBUG: Creating new VIRTUAL HOST:
↳volttron
2020-04-13 13:29:46,582 volttron.utils.rmq_mgmt DEBUG: Create READ, WRITE and
↳CONFIGURE permissions for the user: central-admin
Create new exchange: volttron, {'durable': True, 'type': 'topic', 'arguments': {
↳'alternate-exchange': 'undeliverable'}}
Create new exchange: undeliverable, {'durable': True, 'type': 'fanout'}
2020-04-13 13:29:46,600 rmq_setup.py INFO:
Checking for CA certificate

2020-04-13 13:29:46,601 rmq_setup.py INFO:
  Creating root ca for volttron instance: /home/user/.volttron/certificates/certs/
↳central-root-ca.crt
2020-04-13 13:29:46,601 rmq_setup.py INFO: Creating root ca with the following info: {
↳'C': 'US', 'ST': 'WA', 'L': 'Richland', 'O': 'PNNL', 'OU': 'VOLTTRON', 'CN':
↳'central-root-ca'}
Created CA cert
2020-04-13 13:29:49,668 rmq_setup.py INFO: **Stopped rmq server
2020-04-13 13:30:00,556 rmq_setup.py INFO: Rmq server at /home/user/rabbitmq_server/
↳rabbitmq_server-3.9.7 is running at
2020-04-13 13:30:00,557 rmq_setup.py INFO:

#####

Setup complete for volttron home /home/user/.volttron with instance name=central
Notes:
```

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```

- On production environments, restrict write access to /home/user/.voltttron/
↳certificates/certs/central-root-ca.crt to only admin user. For example: sudo chown_
↳root /home/user/.voltttron/certificates/certs/central-root-ca.crt and /home/user/.
↳voltttron/certificates/certs/central-trusted-cas.crt
- A new admin user was created with user name: central-admin and password=default_
↳passwd.
  You could change this user's password by logging into https://central:15671/_
↳Please update /home/user/.voltttron/rabbitmq_config.yml if you change password

#####

The rmq message bus has a backward compatibility
layer with current zmq instances. What is the
zmq bus's vip address? [tcp://127.0.0.1]: tcp://192.168.56.101
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]: y
Web address set to: https://central
What is the port for this instance? [8443]:
Is this an instance of volttrtron central? [N]: y
Configuring /home/user/voltttron/services/core/VoltttronCentral.
Installing volttrtron central.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
VC admin and password are set up using the admin web interface.
After starting VOLTTTRON, please go to https://central:8443/admin/login.html to_
↳complete the setup.
Will this instance be controlled by volttrtron central? [Y]:
Configuring /home/user/voltttron/services/core/VoltttronCentralPlatform.
What is the name of this instance? [central]:
Volttrtron central address set to https://central:8443
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]:
Would you like to install a platform historian? [N]: y
Configuring /home/user/voltttron/services/core/SQLHistorian.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
Would you like to install a platform driver? [N]:
Would you like to install a listener agent? [N]: y
Configuring examples/ListenerAgent.
['voltttron', '-vv', '-l', '/home/user/.voltttron/voltttron.cfg.log']
Should the agent autostart? [N]: y
Finished configuration!

You can now start the volttrtron instance.

If you need to change the instance configuration you can edit
the config file is at /home/user/.voltttron/config

```

Start VOLTTTRON instance and check if the agents are installed.

```

./start-voltttron
vctl status

```

### Using the web interface:

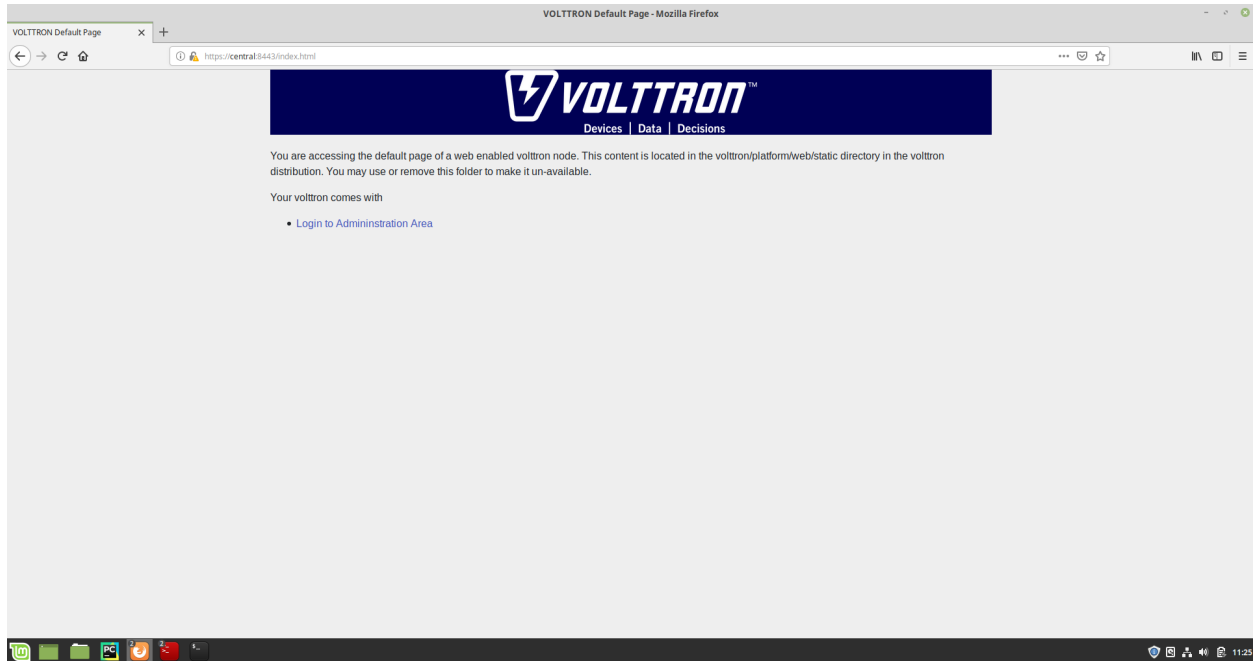
Open browser and go to the platform web admin authentication page *https://central:8443/index.html* to accept/reject incoming certificate signing request (CSR) from other platforms.

---

**Note:** Replace “central” with the proper hostname of VC instance in the admin page URL. If opening the admin page from a different system, then please make that the hostname is resolvable in that machine.

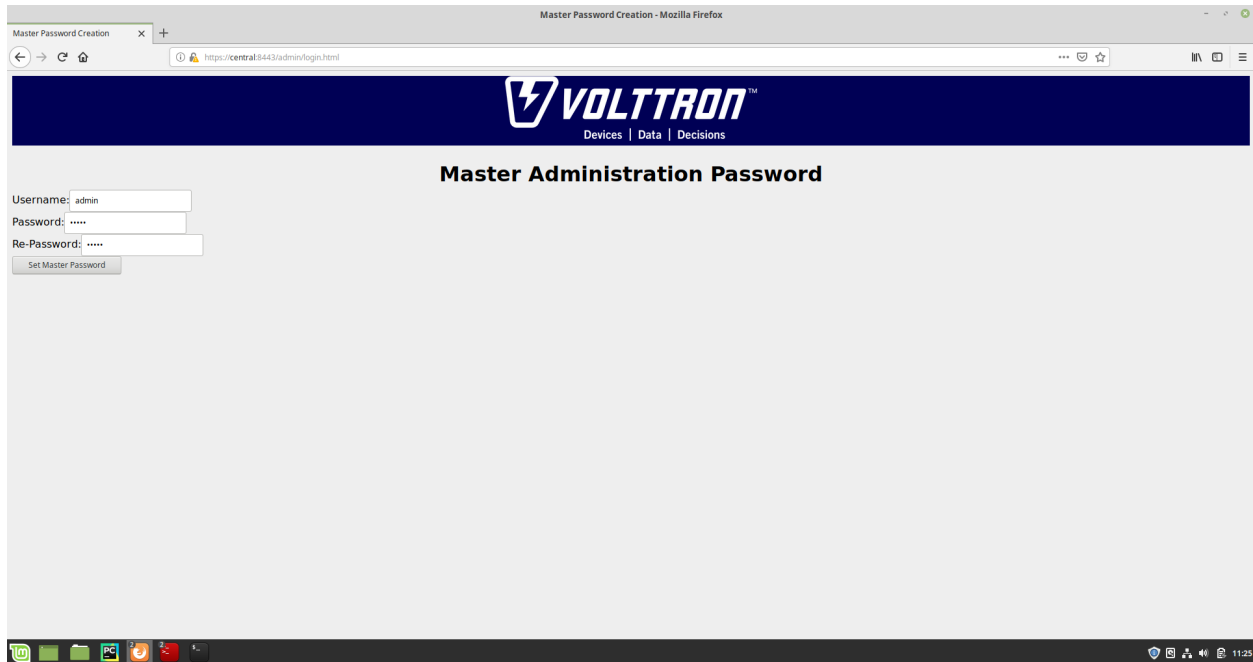
---

Click on “Login To Administration Area”.

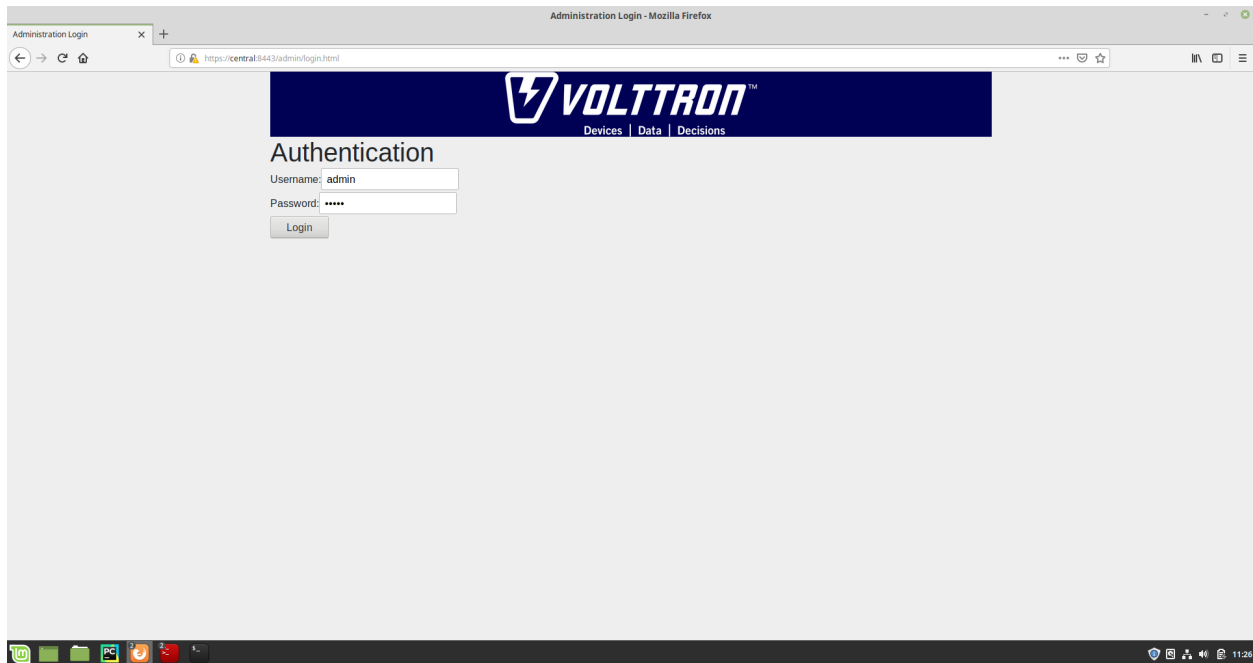


Set the platform web admin username and password. This can be later used to login into the web admin authentication page. This username and password will also be used to log in to Volttron Central.

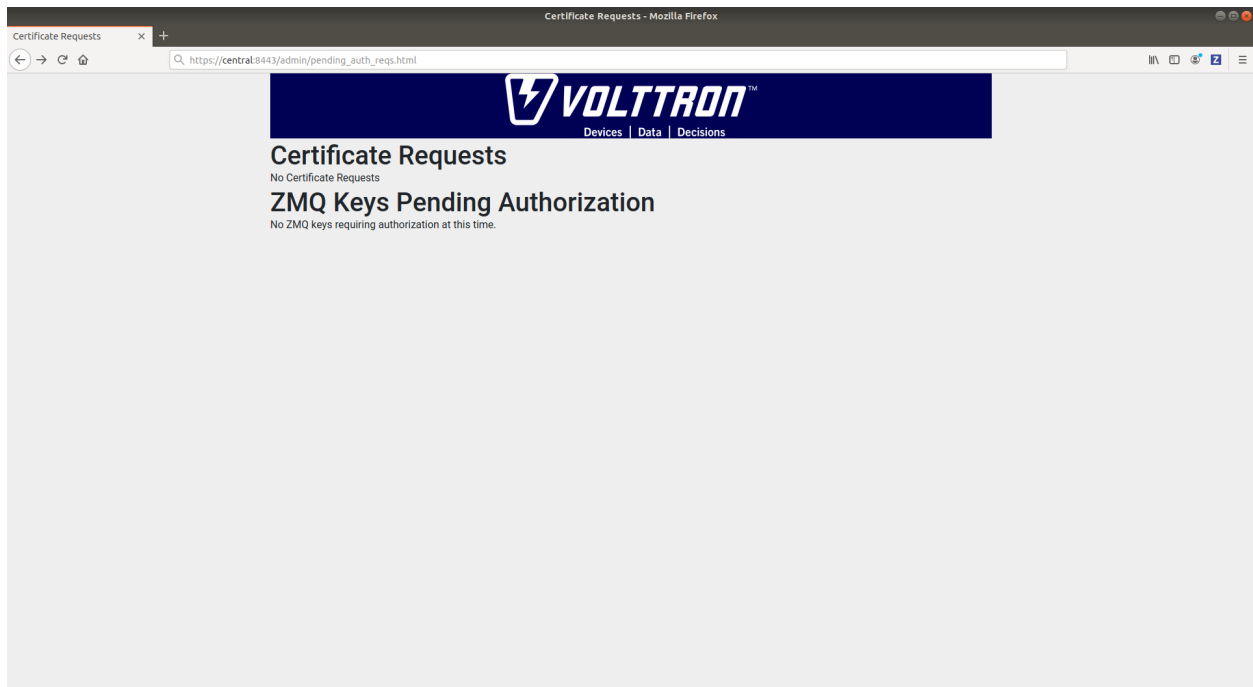




Login into the platform web admin page.



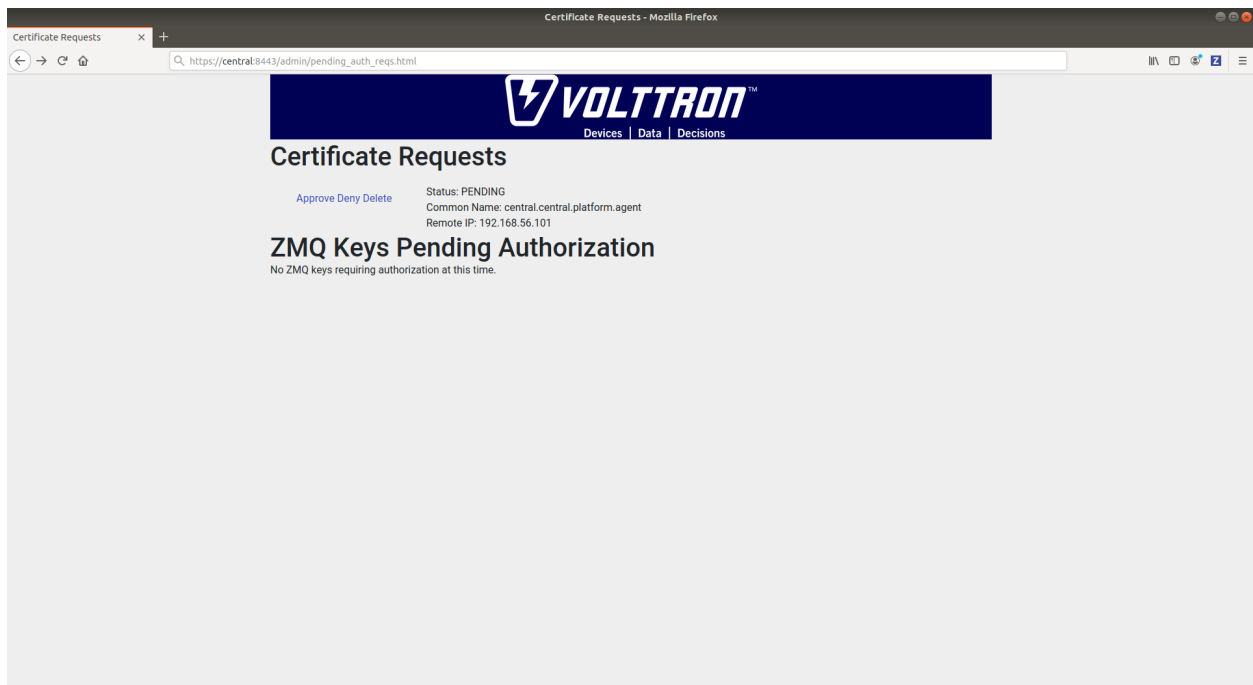
After logging in, you will see no CSR requests initially.



Go back to the terminal and start Volttron Central Platform agent on the “central” instance. The agent will send a CSR request to the web interface.

```
vctl start --tag vcp
```

Now go to the platform web admin page to check if there is a new pending CSR request. You will see a “PENDING” request from “central.central.platform.agent”



Approve the CSR request to allow authenticated SSL based connection to the “central” instance.

Go back to the terminal and check the status of Volttron Central Platform agent. It should be set to “GOOD”.

## Using command line:

Alternatively, you can also check the status of pending CSRs via the command line.

After starting the Volttron Central Platform agent, use the auth remote sub-command's `list` to display the current pending certs.

```
vctl auth remote list
```

You will see the pending CSR appear in the list.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	PENDING

Approve the pending CSR using the approve command.

```
vctl auth remote approve central.central.platform.agent
```

Run the `list` command again to verify that the CSR has been approved.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED

## Node-ZMQ Instance Setup

On the “node-zmq” VM, setup a ZeroMQ based VOLTTRON instance. Using “vcfg” command, install Volttron Central Platform agent, a platform driver agent with a fake driver.

**Note:** This instance will use old ZeroMQ based authentication mechanism using CURVE keys.

```
(volttron)user@node-zmq:~/volttron$ vcfg

Your VOLTTRON_HOME currently set to: /home/user/.volttron

Is this the volttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]:
Will this instance be controlled by volttron central? [Y]:
Configuring /home/user/volttron/services/core/VolttronCentralPlatform.
What is the name of this instance? [volttron1]: collector1
What is the hostname for volttron central? [http://node-zmq]: https://central
What is the port for volttron central? [8080]: 8443
['volttron', '-vv', '-l', '/home/user/.volttron/volttron.cfg.log']
Should the agent autostart? [N]:
Would you like to install a platform historian? [N]:
Would you like to install a platform driver? [N]: y
Configuring /home/user/volttron/services/core/PlatformDriverAgent.
['volttron', '-vv', '-l', '/home/user/.volttron/volttron.cfg.log']
Would you like to install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: y
Would you like to install a listener agent? [N]:
Finished configuration!
```

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```
You can now start the volttron instance.
```

```
If you need to change the instance configuration you can edit
the config file is at /home/user/.volttron/config
```

Please note the Volttron Central web-address should point to that of the “central” instance.

Start VOLTTRON instance and check if the agents are installed.

```
./start-volttron
vctl status
```

Start Volttron Central Platform on this platform manually.

```
vctl start --tag vcp
```

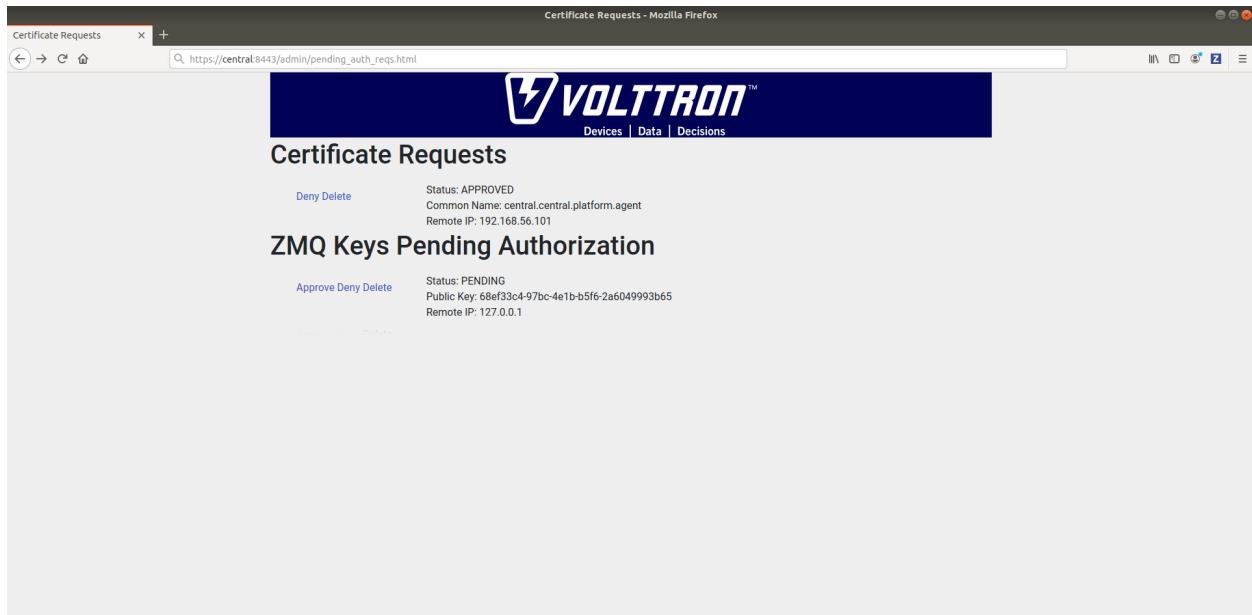
Check the VOLTTRON log in the “central” instance, you will see “authentication failure” entry from the incoming connection. You will need to add the public key of VCP agent on the “central” instance.

```
2019-06-13 11:37:52,023 () volttron.platform.auth INFO: authentication failure: domain='vip', address
='172.20.214.69', mechanism='CURVE', credentials=['f5XjmsCN n4MLV5uKpZmWn49ZzleRYinGrMpgeYmQwg']
```

At this point, you can either accept the connection through the admin page or the command line.

### Using the admin page:

Navigate back to the platform web admin authentication page. You should see a pending request under the ZMQ Keys Pending Authorization header.



Accept the credential in the same method as a CSR.

### Using the command line:

As with the pending CSR, list the current pending certs and credentials.

```
vctl auth remote list
```

You will see the pending ZMQ credential has been added to the list.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	PENDING

Approve the pending ZMQ credential using the approve command.

```
vctl auth remote approve 68ef33c4-97bc-4e1b-b5f6-2a6049993b65
```

Run the list command again to verify that the credential has been approved.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED

Complete similar steps to start a forwarder agent that connects to “central” instance. Modify the configuration in *services/core/ForwardHistorian/rmq\_config.yml* to have a destination *VIP address* pointing to VIP address of the “central” instance and server key of the “central” instance.

```
---
destination-vip: tcp://<ip>:22916
destination-serverkey: <serverkey>
```

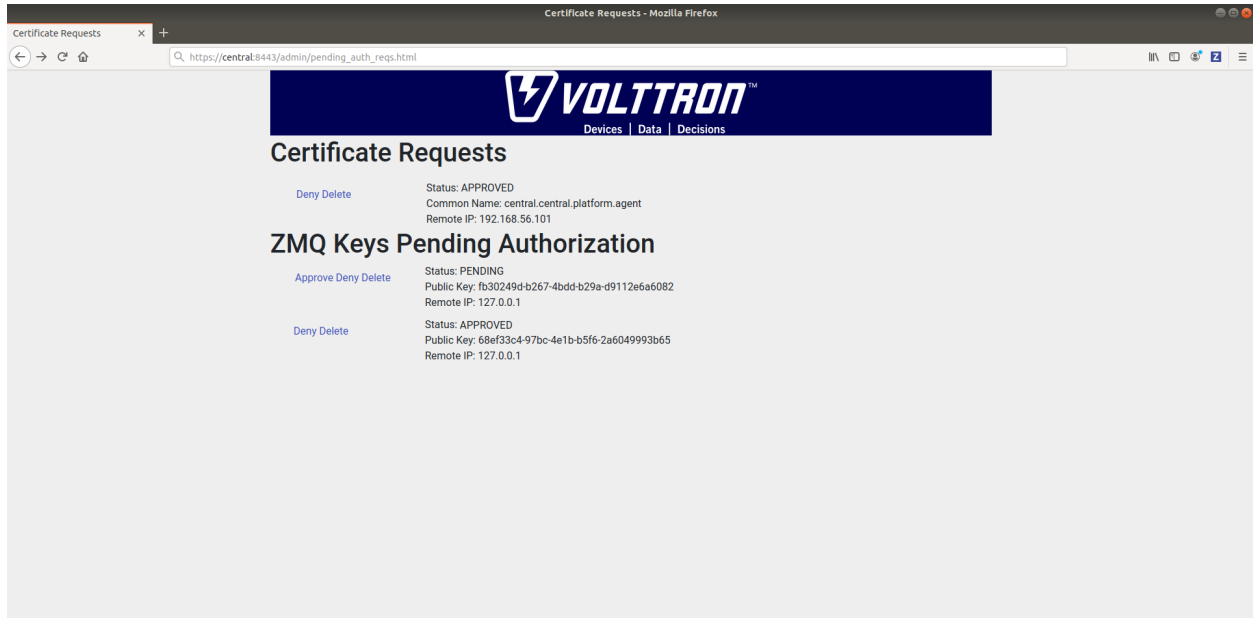
**Note:** Replace <ip> with public facing IP-address of “central” instance and <serverkey> with serverkey of “central” instance. Use the command **vctl auth serverkey** on the “central” instance to get the server key of the instance

Install and start forwarder agent.

```
python scripts/install-agent.py -s services/core/ForwardHistorian -c services/core/
↪ForwardHistorian/rmq_config.yml --start
```

## Using the admin page:

To accept the credential, navigate back to the platform web admin authentication page. You should see another pending request under the ZMQ Keys Pending Authorization header.



Accept this credential in the same method as before.

## Using the command line:

To accept the credential via the command line,

```
vctl auth remote list
```

You will see the pending ZMQ credential has been added to the list.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	PENDING

Approve the pending ZMQ credential using the approve command.

```
vctl auth remote approve fb30249d-b267-4bdd-b29a-d9112e6a6082
```

Run the list command again to verify that the credential has been approved.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	APPROVED

In either case, you should start seeing messages from “collector1” instance on the “central” instance’s VOLTTRON log now.

```

2019-06-13 12:02:45.099 (listeneragent-3.2 10405) listener.agent INFO: Peer: pubsub, Sender: proxy router:, Bus: , Topic: devices/fake-campus/fake-building/fake-device/
all, Headers: {'X-Forwarded': True, 'SynchronizedTimeStamp': '2019-06-13T19:02:45.000000+00:00', 'TimeStamp': '2019-06-13T19:02:45.001920+00:00', 'X-Forwarded-From': 'c
ollector1', 'Date': '2019-06-13T19:02:45.001920+00:00', 'min_compatible_version': '5.0', 'max_compatible_version': u''}, Message:
[{'Heartbeat': True, 'PowerState': 0, 'ValveState': 0, 'temperature': 50.0},
 {'Heartbeat': {'type': 'integer', 'tz': 'US/Pacific', 'units': 'On/Off'},
  'PowerState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
  'ValveState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
  'temperature': {'type': 'integer',
                  'tz': 'US/Pacific',
                  'units': 'Fahrenheit'}}]
2019-06-13 12:02:45.097 (listeneragent-3.2 10403) listener.agent INFO: Peer: pubsub, Sender: proxy router:, Bus: , Topic: devices/fake-campus/fake-building/fake-device/
all, Headers: {'X-Forwarded': True, 'SynchronizedTimeStamp': '2019-06-13T19:02:45.000000+00:00', 'TimeStamp': '2019-06-13T19:02:45.001920+00:00', 'X-Forwarded-From': 'c
ollector1', 'Date': '2019-06-13T19:02:45.001920+00:00', 'min_compatible_version': '5.0', 'max_compatible_version': u''}, Message:
[{'Heartbeat': True, 'PowerState': 0, 'ValveState': 0, 'temperature': 50.0},
 {'Heartbeat': {'type': 'integer', 'tz': 'US/Pacific', 'units': 'On/Off'},
  'PowerState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
  'ValveState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
  'temperature': {'type': 'integer',
                  'tz': 'US/Pacific',
                  'units': 'Fahrenheit'}}]

```

## Node-RMQ Instance Setup

**Note:** This instance must have been bootstrapped using `--rabbitmq` see [RabbitMq installation instructions](#).

Using “`vcfg`” command, install Volttron Central Platform agent, a platform driver agent with fake driver. The instance name is set to “`collector2`”.

```

(volttron)user@node-rmq:~/volttron$ vcfg

Your VOLTTRON_HOME currently set to: /home/user/.volttron

Is this the volttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]: rmq
Name of this volttron instance: [volttron1]: collector2
RabbitMQ server home: [/home/user/rabbitmq_server/rabbitmq_server-3.9.7]:
Fully qualified domain name of the system: [node-rmq]:
Would you like to create a new self signed root CA certificate for this instance: [Y]:

Please enter the following details for root CA certificate
  Country: [US]:
  State: WA
  Location: Richland
  Organization: PNNL
  Organization Unit: volttron
Do you want to use default values for RabbitMQ home, ports, and virtual host: [Y]:
2020-04-13 13:29:36,347 rmq_setup.py INFO: Starting RabbitMQ server
2020-04-13 13:29:46,528 rmq_setup.py INFO: Rmq server at /home/user/rabbitmq_server/
↳rabbitmq_server-3.9.7 is running at
2020-04-13 13:29:46,554 volttron.utils.rmq_mgmt DEBUG: Creating new VIRTUAL HOST:
↳volttron
2020-04-13 13:29:46,582 volttron.utils.rmq_mgmt DEBUG: Create READ, WRITE and
↳CONFIGURE permissions for the user: collector2-admin
Create new exchange: volttron, {'durable': True, 'type': 'topic', 'arguments': {
↳'alternate-exchange': 'undeliverable'}}
Create new exchange: undeliverable, {'durable': True, 'type': 'fanout'}
2020-04-13 13:29:46,600 rmq_setup.py INFO:
Checking for CA certificate

2020-04-13 13:29:46,601 rmq_setup.py INFO:
  Creating root ca for volttron instance: /home/user/.volttron/certificates/certs/
↳collector2-root-ca.crt
2020-04-13 13:29:46,601 rmq_setup.py INFO: Creating root ca with the following info: {
↳'C': 'US', 'ST': 'WA', 'L': 'Richland', 'O': 'PNNL', 'OU': 'VOLTTRON', 'CN':
↳'collector2-root-ca'}

```

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(continued from previous page)

```

Created CA cert
2020-04-13 13:29:49,668 rmq_setup.py INFO: **Stopped rmq server
2020-04-13 13:30:00,556 rmq_setup.py INFO: Rmq server at /home/user/rabbitmq_server/
↳rabbitmq_server-3.9.7 is running at
2020-04-13 13:30:00,557 rmq_setup.py INFO:

#####

Setup complete for volttron home /home/user/.volttron with instance name=collector2
Notes:
- On production environments, restrict write access to /home/user/.volttron/
↳certificates/certs/collector2-root-ca.crt to only admin user. For example: sudo_
↳chown root /home/user/.volttron/certificates/certs/collector2-root-ca.crt and /home/
↳user/.volttron/certificates/certs/collector2-trusted-cas.crt
- A new admin user was created with user name: collector2-admin and password=default_
↳passwd.
  You could change this user's password by logging into https://node-rmq:15671/_
↳Please update /home/user/.volttron/rabbitmq_config.yml if you change password

#####

The rmq message bus has a backward compatibility
layer with current zmq instances. What is the
zmq bus's vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]:
Will this instance be controlled by volttron central? [Y]:
Configuring /home/user/volttron/services/core/VolttronCentralPlatform.
What is the name of this instance? [collector2]:
What is the hostname for volttron central? [http://node-rmq]: https://central
What is the port for volttron central? [8443]:
['volttron', '-vv', '-l', '/home/user/.volttron/volttron.cfg.log']
Should the agent autostart? [N]:
Would you like to install a platform historian? [N]:
Would you like to install a platform driver? [N]: y
Configuring /home/user/volttron/services/core/PlatformDriverAgent.
['volttron', '-vv', '-l', '/home/user/.volttron/volttron.cfg.log']
Would you like to install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: y
Would you like to install a listener agent? [N]:
Finished configuration!

You can now start the volttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/user/.volttron/config

```

**Note:** The Volttron Central web-address should point to that of the “central” instance.

Start VOLTTRON instance and check if the agents are installed.

```

./start-volttron
vctl status

```

Start Volttron Central Platform on this platform manually.

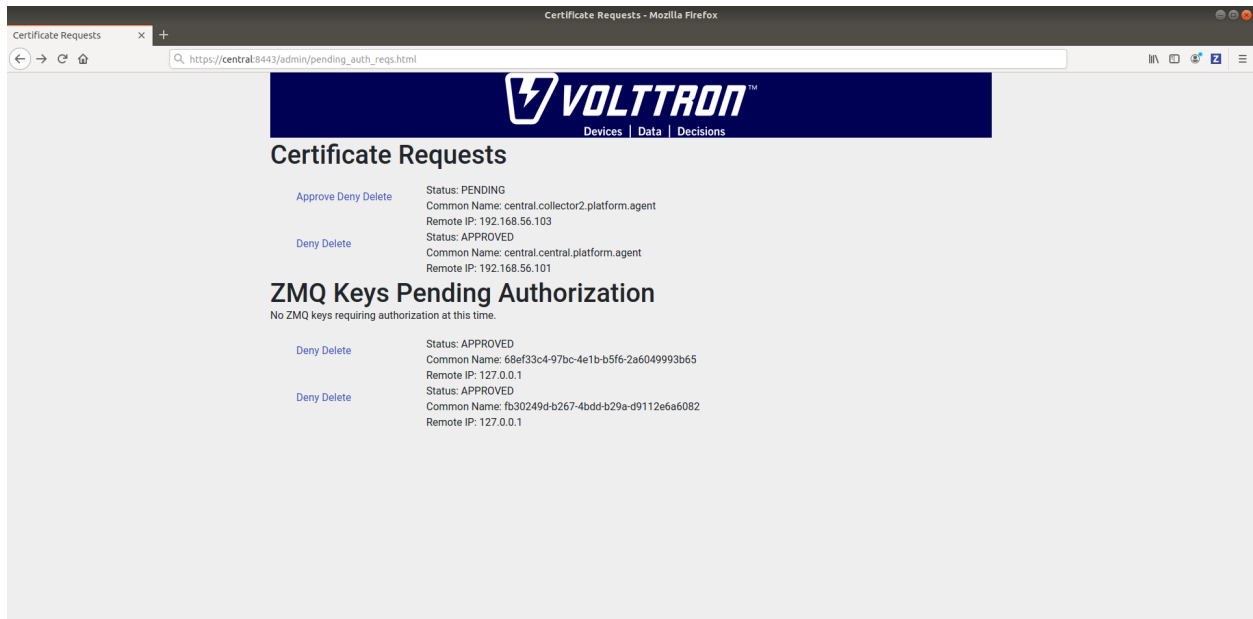


```
vctl start --tag vcp
```

Accept the pending CSR request.

### Using the admin page:

Go to the master admin authentication page and check if there is a new pending CSR request from VCP agent of “collector2” instance.



Approve the CSR request to allow authenticated SSL based connection to the “central” instance.

### Using the command line:

As before, this can be done via the command line as follows:

```
vctl auth remote list
```

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
central.collector2.forwarderagent-5.1_1	192.168.56.101	PENDING
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	APPROVED

Approve the pending CSR using the approve command.

```
vctl auth remote approve central.collector2.forwarderagent-5.1_1
```

Run the list command again to verify that the CSR has been approved.

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
central.collector2.forwarderagent-5.1_1	192.168.56.101	APPROVED

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68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	APPROVED

Now go back to the terminal and check the status of Volttron Central Platform agent. It should be set to “GOOD”.

Let’s now install a forwarder agent on this instance to forward local messages matching “devices” topic to external “central” instance. Modify the configuration in `services/core/ForwardHistorian/rmq_config.yml` to have a destination address pointing to web address of the “central” instance.

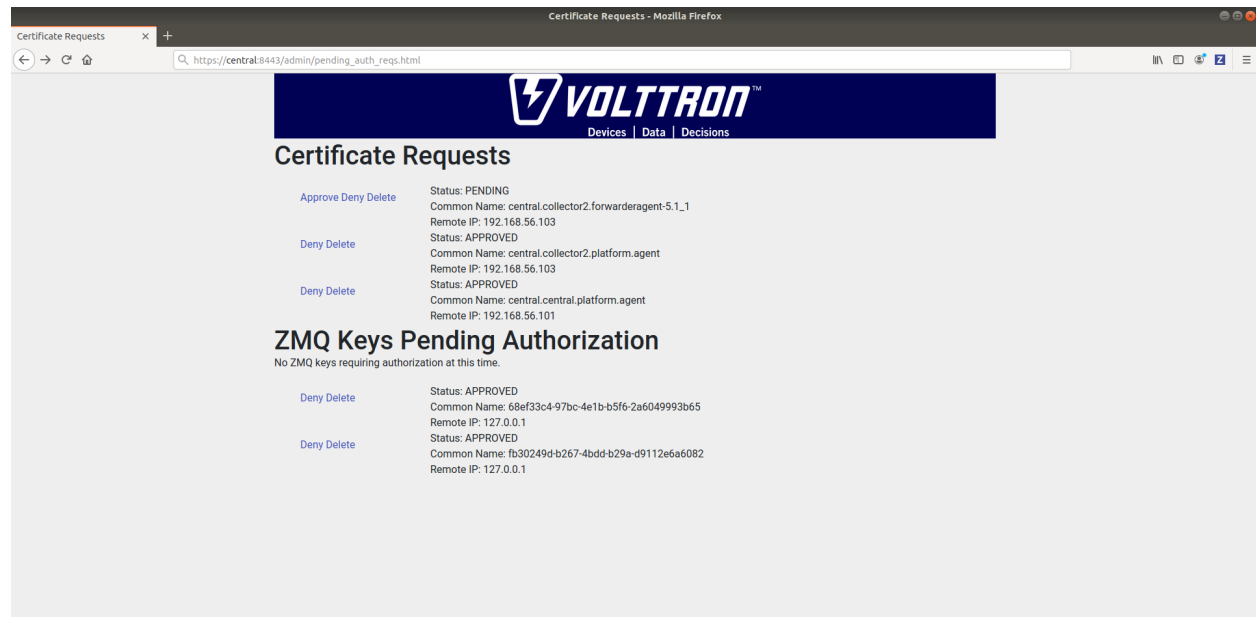
```
---
destination-address: https://central:8443
```

Start forwarder agent.

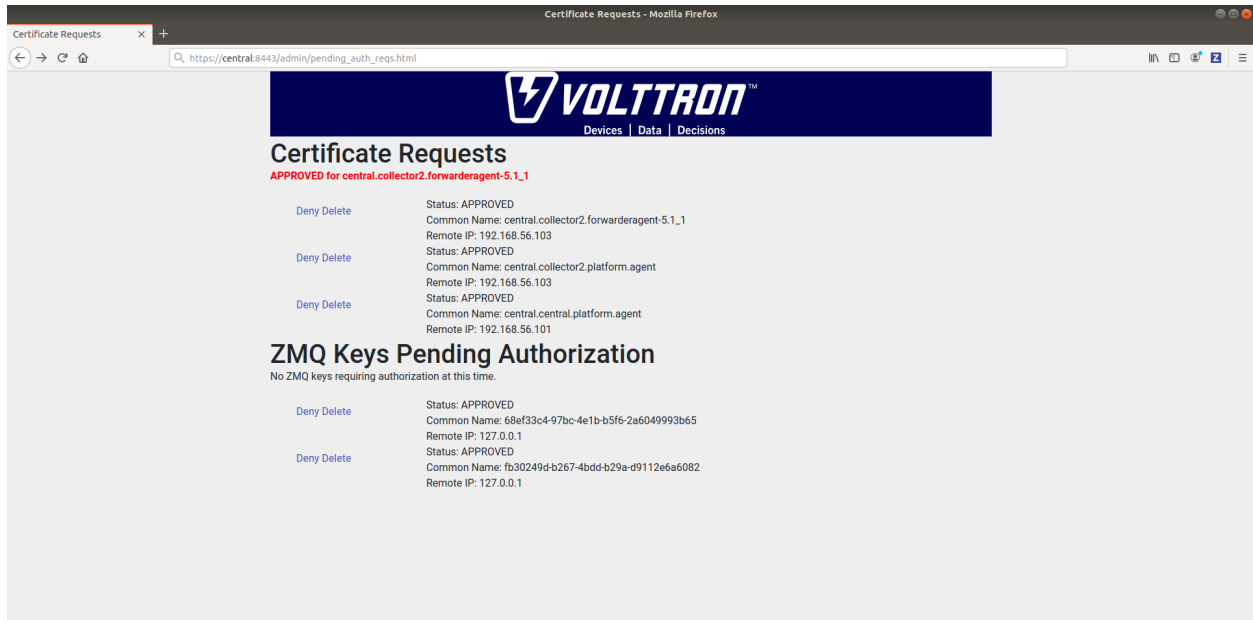
```
python scripts/install-agent.py -s services/core/ForwardHistorian -c services/core/
  ↪ForwardHistorian/rmq_config.yml --start
```

## Using the admin page:

Go the master admin authentication page and check if there is a new pending CSR request from forwarder agent of “collector2” instance.



Approve the CSR request to allow authenticated SSL based connection to the “central” instance.



## Using the command line:

If using command line for this process:

```
vctl auth remote list
```

USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
central.collector2.platform.agent	192.168.56.103	APPROVED
central.collector2.forwarderagent-5.1_1	192.168.56.103	PENDING
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	APPROVED

Approve the pending CSR using the approve command.

```
vctl auth remote approve central.collector2.forwarderagent-5.1_1
```

Run the list command again to verify that the CSR has been approved.

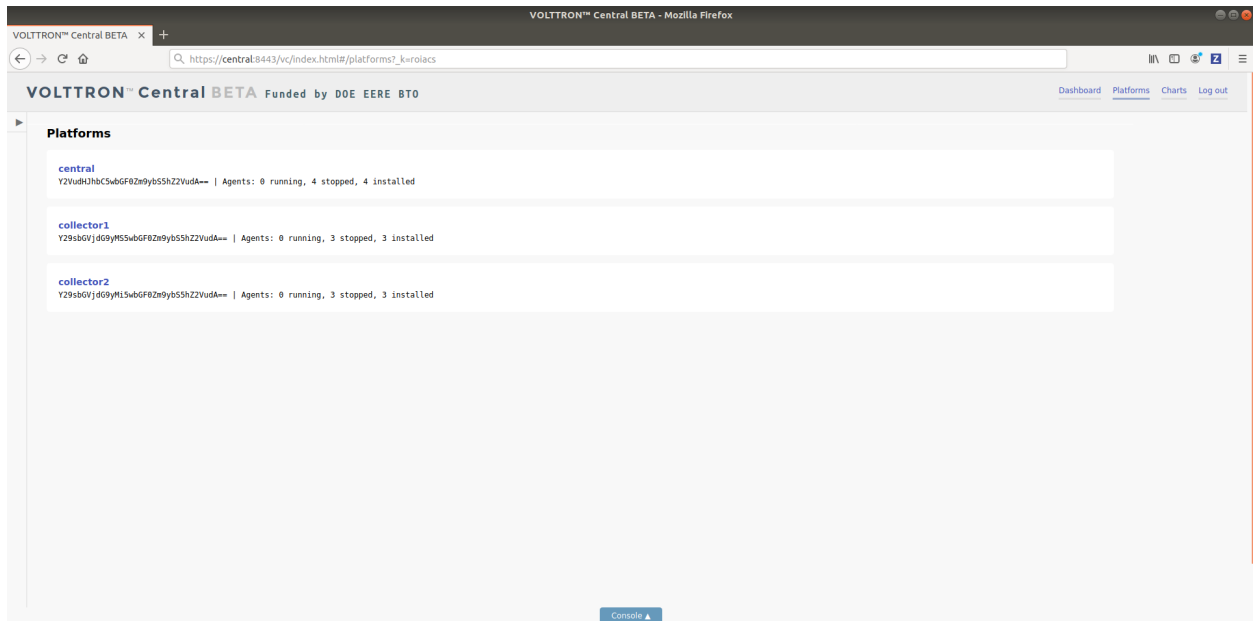
USER_ID	ADDRESS	STATUS
central.central.platform.agent	192.168.56.101	APPROVED
central.collector2.platform.agent	192.168.56.103	APPROVED
central.collector2.forwarderagent-5.1_1	192.168.56.103	APPROVED
68ef33c4-97bc-4e1b-b5f6-2a6049993b65	127.0.0.1	APPROVED
fb30249d-b267-4bdd-b29a-d9112e6a6082	127.0.0.1	APPROVED

Now go back to the terminal and check the status of forwarder agent. It should be set to “GOOD”.

Check the VOLTTRON log of “central” instance. You should see messages with “devices” topic coming from “collector2” instance.

```
2019-06-13 12:00:00.025 [listeneragent-3.2 10403] listener.agent INFO: Peer: pubsub, Sender: collector2.forwarderagent-5.1_1, Bus: , Topic: devices/fake-campus/fake-building/fake-device/all, Headers: {X-Forwarded: True, 'SynchronizedTimestamp': '2019-06-13T19:00:00.000000+00:00', 'Timestamp': '2019-06-13T19:00:00.004159+00:00', 'X-Forwarded-From': 'collector2', 'Date': '2019-06-13T19:00:00.004159+00:00', 'min_compatible_version': '5.0', 'max_compatible_version': 'u'}), Message:
[{'Heartbeat': True, 'PowerState': 0, 'ValveState': 0, 'temperature': 50.0},
{'Heartbeat': {'type': 'integer', 'tz': 'US/Pacific', 'units': 'On/Off'},
'PowerState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
'ValveState': {'type': 'integer', 'tz': 'US/Pacific', 'units': '1/0'},
'temperature': {'type': 'integer',
'tz': 'US/Pacific',
'units': 'Fahrenheit'}}]
```

To confirm that VolttronCentral is monitoring the status of all the 3 platforms, open a browser and type this URL <https://central:8443/vc/index.html>. Login using credentials (username and password) earlier set during the VC configuration step (using `vcfg` command in “central” instance). Click on “platforms” tab in the far right corner. You should see all three platforms listed in that page. Click on each of the platforms and check the status of the agents.



## VOLTTRON Central Deployment

VOLTTRON Central is a platform management web application that allows platforms to communicate and to be managed from a centralized server. This agent alleviates the need to ssh into independent nodes in order to manage them. The demo will start up three different instances of VOLTTRON with three historians and different agents on each host. The following entries will help to navigate around the VOLTTRON Central interface.

### Contents

- *VOLTTRON Central Deployment*
  - *Getting Started*
  - *Remote Platform Configuration*
  - *Starting the Demo*
  - *VOLTTRON Admin*
  - *Stopping the Demo*
  - *Log In*
  - *Log Out*
    - \* *Platforms Tree*
  - *Loading the Tree*
  - *Health Status*
  - *Filter the Tree*

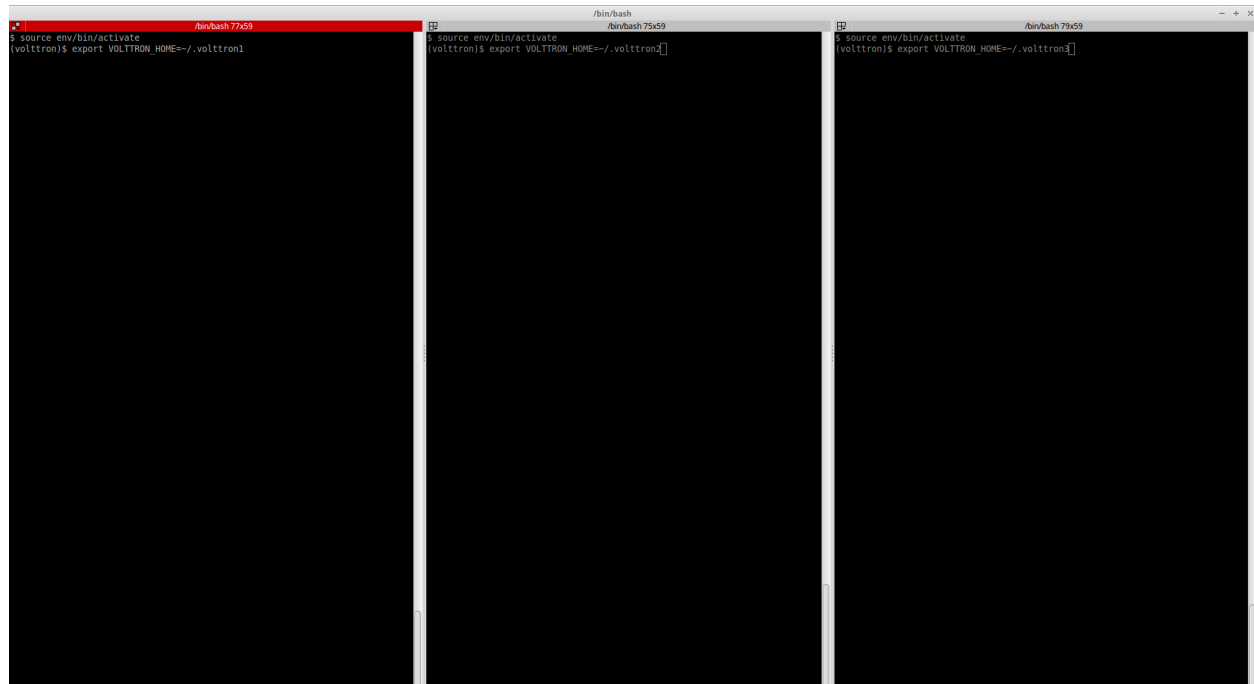
- \* *Platforms Screen*
- \* *Platform View*
- \* *Add Charts*
- *Dashboard Charts*
- *Remove Charts*
- \* *VOLTRON Central*

## Getting Started

After *installing VOLTRON*, open three shells with the current directory the root of the VOLTRON repository. Then activate the VOLTRON environment and export the *VOLTRON\_HOME* variable. The home variable needs to be different for each instance.

If you are using Terminator you can right click and select “Split Vertically”. This helps us keep from losing terminal windows or duplicating work.

```
$ source env/bin/activate
$ export VOLTRON_HOME=~/.volttron1
```



One of our instances will have a VOLTRON Central agent. We will install a platform agent and a historian on all three platforms. Please note, for this demo all the instances run on the ZeroMQ message bus. For multi-platform, multi-bus deployment setup please follow the steps described in *Multi Platform Multi-Bus Deployment*.

Run *vcfg* in the first shell. This command will ask how the instance should be set up. Many of the options have defaults that will be sufficient. When asked if this instance is a VOLTRON Central enter *y*. Read through the options and use the enter key to accept default options. There are no default credentials for VOLTRON Central. You can have it install the agents at this time. Below is an example configuration. In this case, username is *user* and localhost is *volttron-pc*.

```

(voltttron)user@voltttron-pc:~/voltttron$ vcfg

Your VOLTTTRON_HOME currently set to: /home/user/.voltttron1

Is this the voltttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]:
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]: y
What is the protocol for this instance? [https]:
Web address set to: https://voltttron-pc
What is the port for this instance? [8443]:
Would you like to generate a new web certificate? [Y]:
WARNING! CA certificate does not exist.
Create new root CA? [Y]:

Please enter the following details for web server certificate:
    Country: [US]:
    State: WA
    Location: Richland
    Organization: PNNL
    Organization Unit: VOLTTTRON
Created CA cert
Creating new web server certificate.
Is this an instance of voltttron central? [N]: y
Configuring /home/user/voltttron/services/core/VoltttronCentral.
Installing voltttron central.
Should the agent autostart? [N]: y
VC admin and password are set up using the admin web interface.
After starting VOLTTTRON, please go to https://voltttron-pc:8443/admin/login.
→html to complete the setup.
Will this instance be controlled by voltttron central? [Y]: y
Configuring /home/user/voltttron/services/core/VoltttronCentralPlatform.
What is the name of this instance? [voltttron1]:
Voltttron central address set to https://voltttron-pc:8443
Should the agent autostart? [N]: y
Would you like to install a platform historian? [N]: y
Configuring /home/user/voltttron/services/core/SQLHistorian.
Should the agent autostart? [N]: y
Would you like to install a platform driver? [N]: y
Configuring /home/user/voltttron/services/core/PlatformDriverAgent.
Would you like to install a fake device on the platform driver? [N]: y
Should the agent autostart? [N]: y
Would you like to install a listener agent? [N]: y
Configuring examples/ListenerAgent.
Should the agent autostart? [N]: y
Finished configuration!

You can now start the voltttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/user/.voltttron1/config

(voltttron)user@voltttron-pc:~/voltttron$

```

VOLTTTRON Central needs to accept the connecting instances' public keys. For this example we'll allow any CURVE credentials to be accepted. After *starting*, the command **vtcl auth add** will prompt the user for information about how the credentials should be used. We can simply hit Enter to select defaults on all fields except **credentials**, where we

will type `./.*`

```
$ vctl auth add --credentials "/*.*/"
added entry domain=None, address=None, mechanism='CURVE', credentials=u'/*.*/', user_
↪id='63b126a7-2941-4ebe-8588-711d1e6c70d1'
```

For more information on authorization see [authentication](#).

## Remote Platform Configuration

The next step is to configure the instances that will connect to VOLTTTRON Central. In the second and third terminal windows run `vcfg`. Like the `VOLTTTRON_HOME` variable, these instances need to have a unique [VIP address](#) and a unique instance name.

Install a platform agent and a historian as before. Since we used the default options when configuring VOLTTTRON Central, we can use the default options when configuring these platform agents as well. The configuration will be a little different. The example below is for the second voltttron instance. Note the unique VIP address and instance name. Please ensure the web-address of the voltttron central is configured correctly.

```
(voltttron)user@voltttron-pc:~/voltttron$ vcfg

Your VOLTTTRON_HOME currently set to: /home/user/.voltttron2

Is this the voltttron you are attempting to setup? [Y]:
What type of message bus (rmq/zmq)? [zmq]:
What is the vip address? [tcp://127.0.0.1]: tcp://127.0.0.2
What is the port for the vip address? [22916]:
Is this instance web enabled? [N]:
Will this instance be controlled by voltttron central? [Y]:
Configuring /home/user/voltttron/services/core/VoltttronCentralPlatform.
What is the name of this instance? [voltttron1]: voltttron2
What is the hostname for voltttron central? [https://voltttron-pc]:
What is the port for voltttron central? [8443]:
Should the agent autostart? [N]: y
Would you like to install a platform historian? [N]: y
Configuring /home/user/voltttron/services/core/SQLHistorian.
Should the agent autostart? [N]: y
Would you like to install a platform driver? [N]:
Would you like to install a listener agent? [N]:
Finished configuration!

You can now start the voltttron instance.

If you need to change the instance configuration you can edit
the config file is at /home/user/.voltttron2/config

(voltttron)user@voltttron-pc:~/voltttron$
```

### Starting the Demo

Start each Volttron instance after configuration. You have two options.

Option 1: The following command starts the volttron process in the background. The “-l” option tells volttron to log to a file. The file name should be different for each instance.

```
$ volttron -vv -l volttron.log&
```

Option 2: Use the utility script start-volttron. This will override the default log file each time the script is ran unless the script is modified with a different filename for each instance.

```
$ ./start-volttron
```

---

**Note:** If you chose to not start your agents with their platforms they will need to be started by hand.

---

List the installed agents with

```
$ vctl status
```

A portion of each agent’s uuid makes up the leftmost column of the status output. This is all that is needed to start or stop the agent. If any installed agents share a common prefix then more of the uuid will be needed to identify it.

```
$ vctl start uuid
```

or

```
$ vctl start --tag tag
```

---

**Note:** In each of the above examples one could use \* suffix to match more than one agent.

---

### VOLTTRON Admin

The admin page is used to set the master username and password for both admin page and VOLTTRON Central page. Admin page can then be used to manage RMQ and ZMQ certificates and credentials.

Open a web browser and navigate to <https://volttron-pc:8443/admin/login.html>

There may be a message warning about a potential security risk. Check to see if the certificate that was created in vcfg is being used. The process below is for firefox.





## Warning: Potential Security Risk Ahead

Firefox detected a potential security threat and did not continue to `volttron-pc`. If you visit this site, attackers could try to steal information like your passwords, emails, or credit card details.

### What can you do about it?

The issue is most likely with the website, and there is nothing you can do to resolve it.

If you are on a corporate network or using anti-virus software, you can reach out to the support teams for assistance. You can also notify the website's administrator about the problem.

[Learn more...](#)

Go Back (Recommended)

Advanced...

☐ Report errors like this to help Mozilla identify and block malicious sites



Someone could be trying to impersonate the site and you should not continue.

Websites prove their identity via certificates. Firefox does not trust `volttron-pc :8443` because its certificate issuer is unknown, the certificate is self-signed, or the server is not sending the correct intermediate certificates.

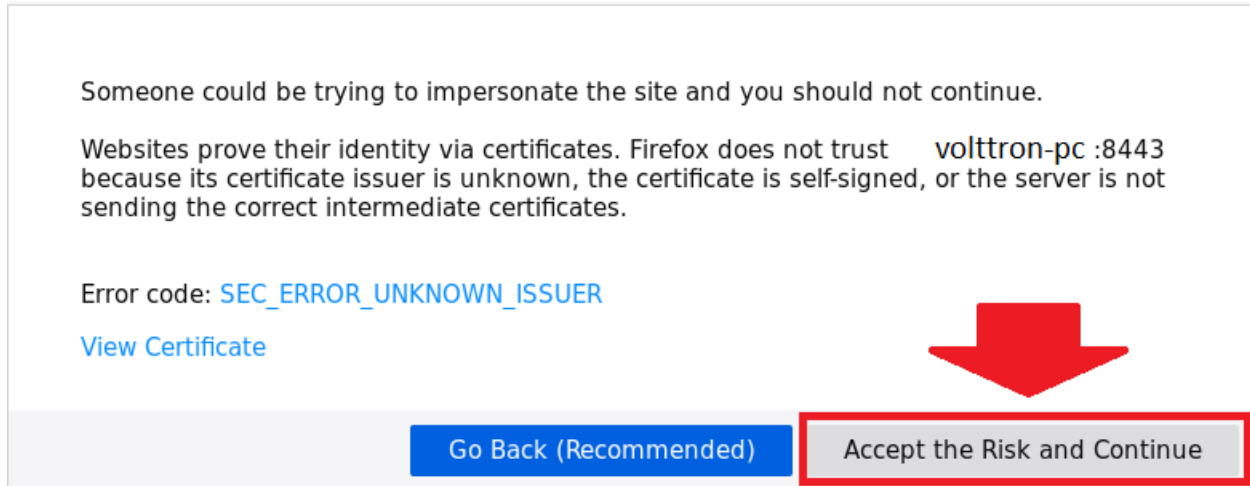
Error code: [SEC\\_ERROR\\_UNKNOWN\\_ISSUER](#)

[View Certificate](#)

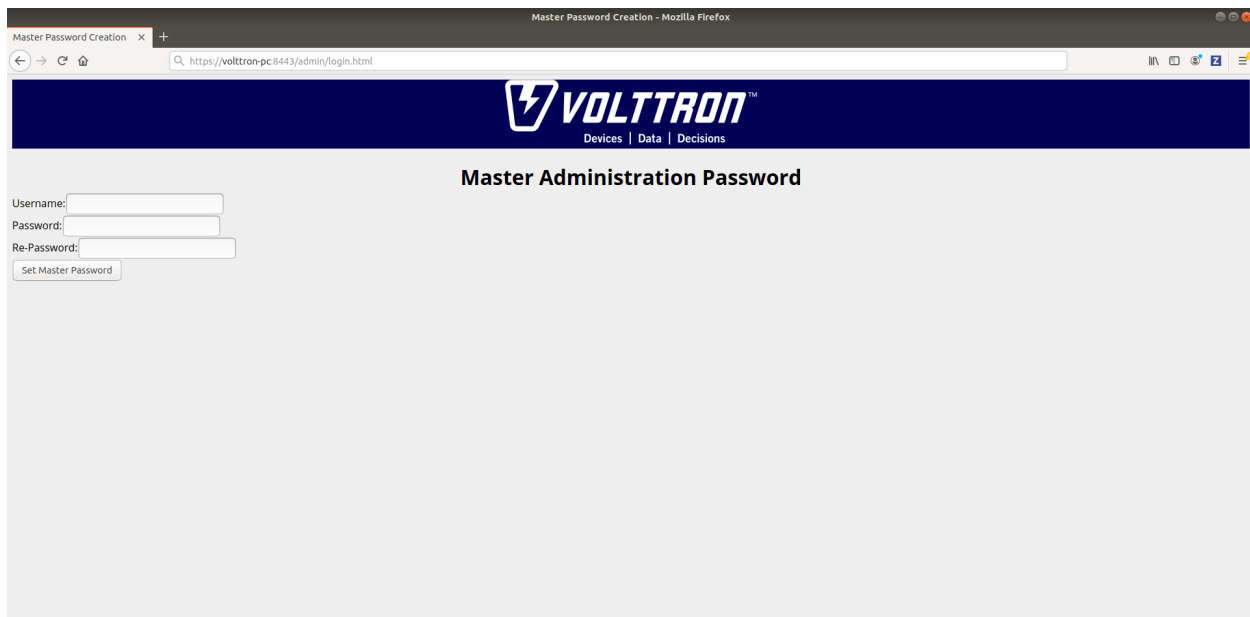
Go Back (Recommended)

Accept the Risk and Continue





When the admin page is accessed for the first time, the user will be prompted to set up a master username and password.



Open your browser to the web address that you specified for the VOLTTRON Central agent that you configured for the first instance. In the above examples, the configuration file would be located at `~/.volttron1/config` and the VOLTTRON Central address would be defined in the “volttron-central-address” field. The VOLTTRON Central address takes the pattern: `https://<localhost>:8443/vc/index.html`, where localhost is the hostname of your machine. In the above examples, our hostname is `volttron-pc`; thus our VC interface would be `https://volttron-pc:8443/vc/index.html`.

You will need to provide the username and password set earlier through admin web page.

## Stopping the Demo

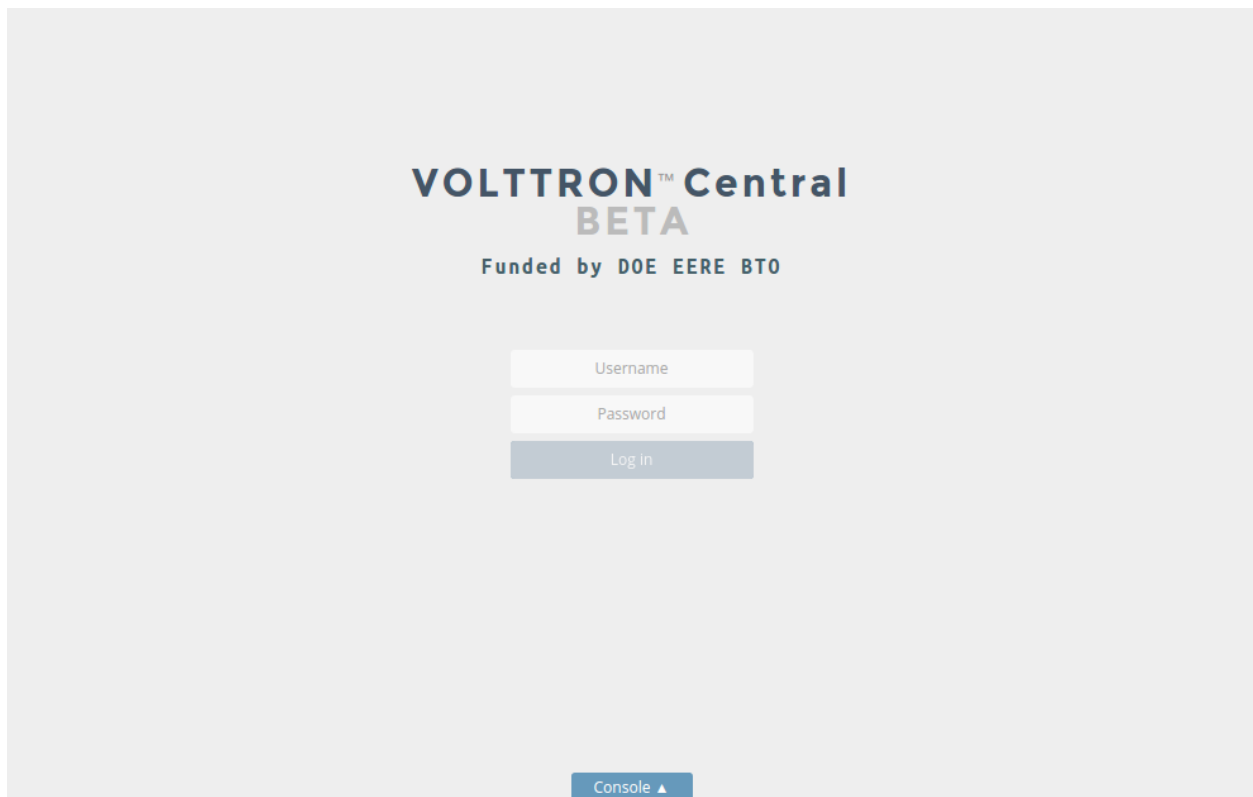
Once you have completed your walk through of the different elements of the VOLTTRON Central demo you can stop the demos by executing the following command in each terminal window.

```
$ ./stop-volttron
```

Once the demo is complete you may wish to see the *VOLTTRON Central Management Agent* page for more details on how to configure the agent for your specific use case.

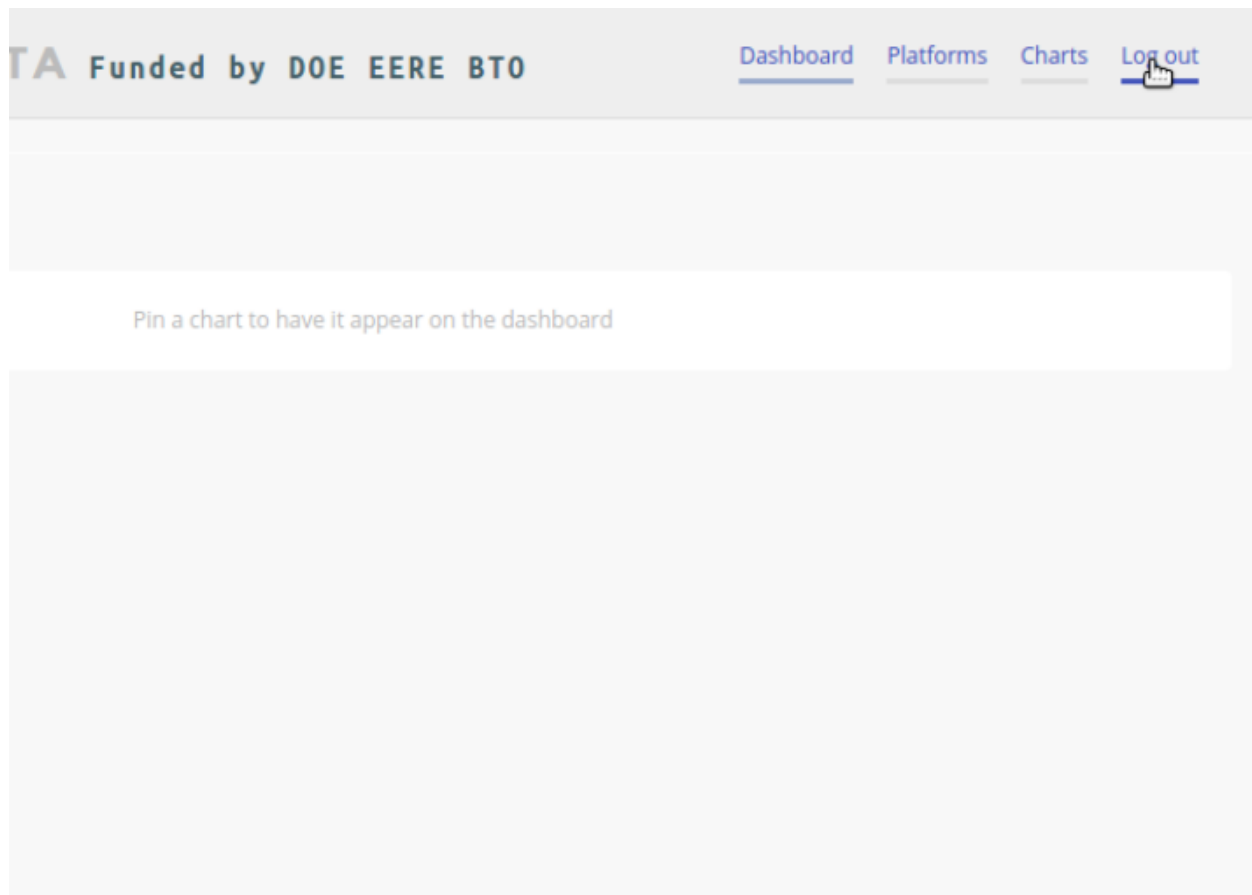
## Log In

To log in to VOLTTRON Central, open a browser and login to the Volttron web interface, which takes the form <https://localhost:8443/vc/index.html> where localhost is the hostname of your machine. In the above example, we open the following URL in which our localhost is “volttron-pc”: <https://volttron-pc:8443/vc/index.html> and enter the user name and password on the login screen.



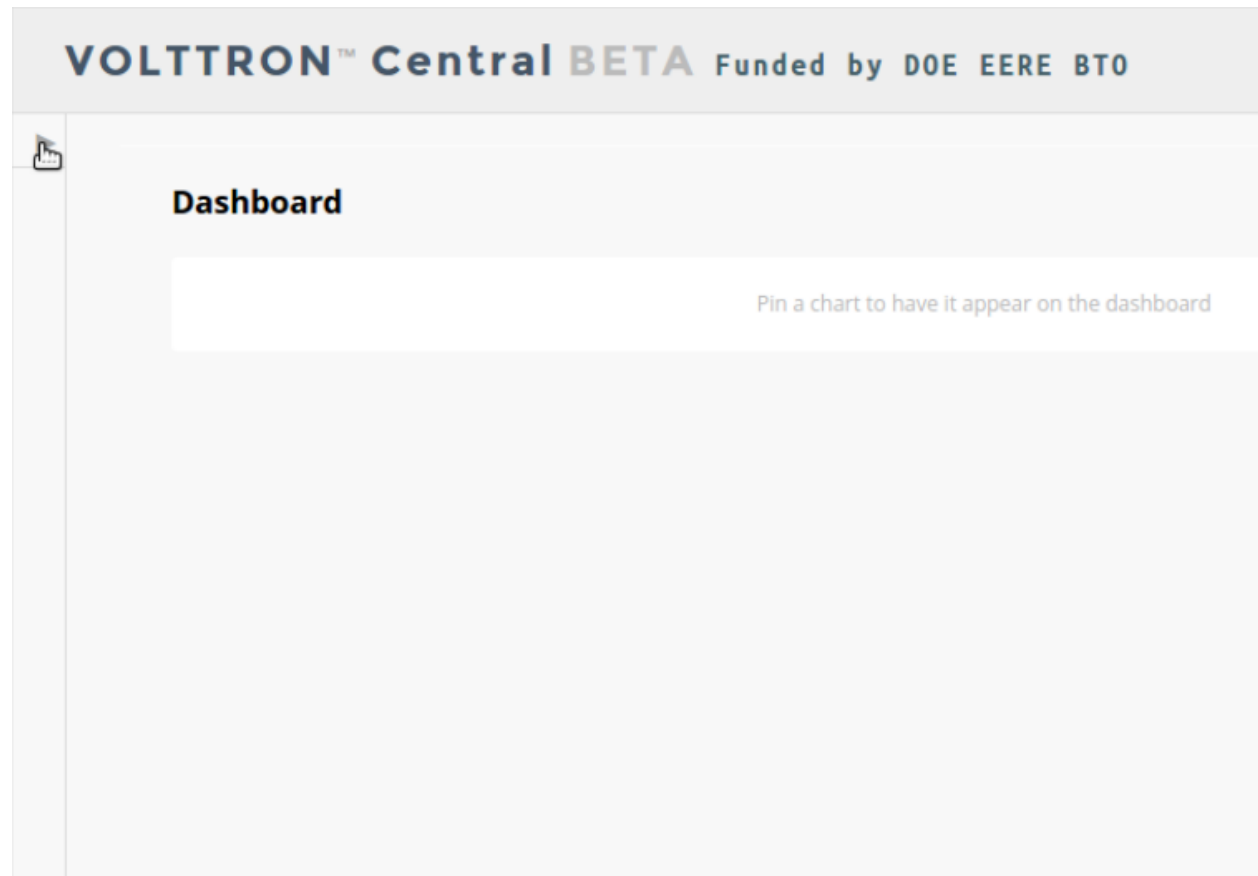
## Log Out

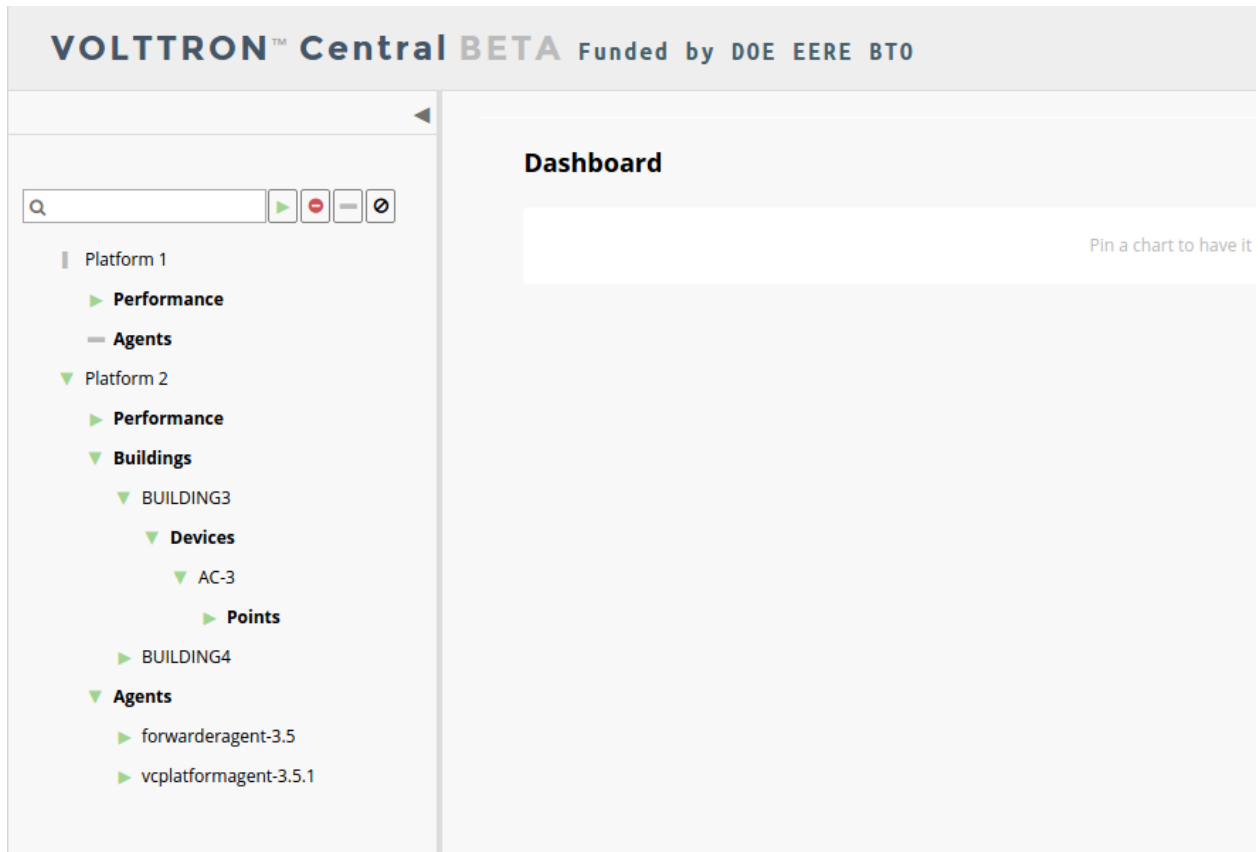
To log out of VOLTTRON Central, click the link at the top right of the screen.



## Platforms Tree

The side panel on the left of the screen can be extended to reveal the tree view of registered platforms.

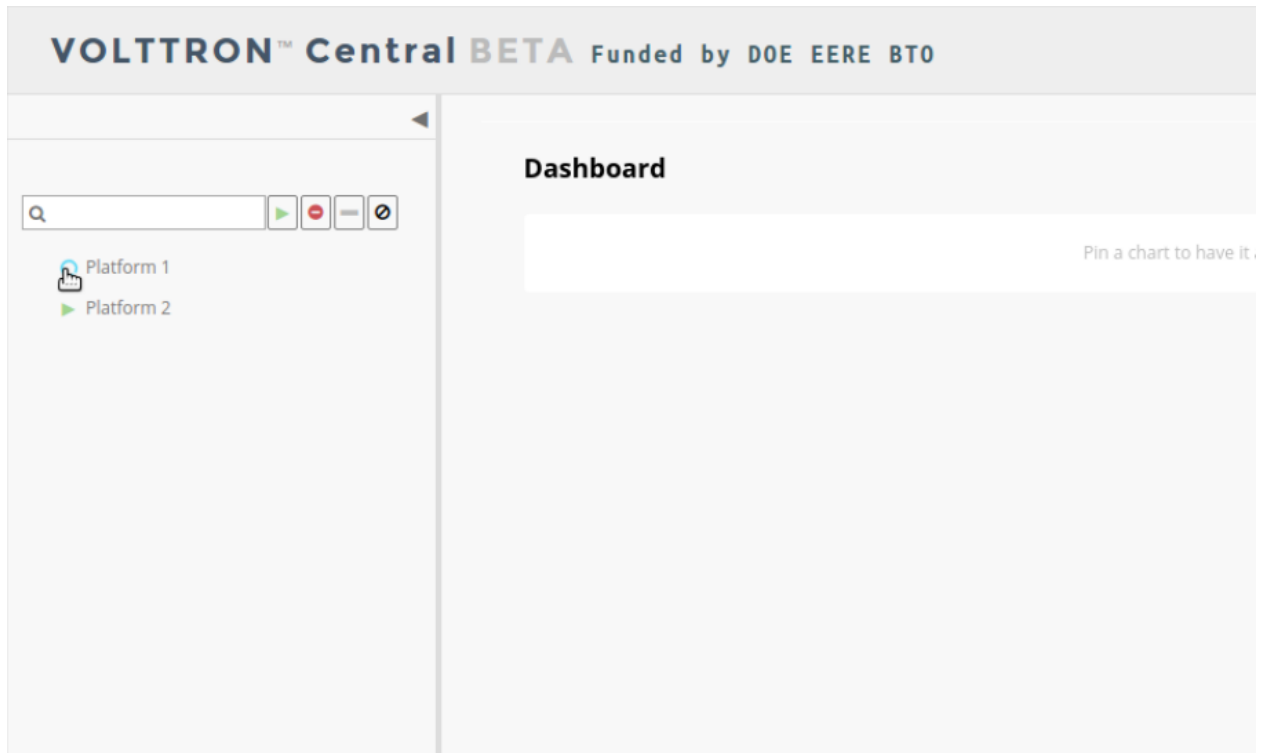




Top-level nodes in the tree are platforms. Platforms can be expanded in the tree to reveal installed agents, devices on buildings, and performance statistics about the platform instances.

## Loading the Tree

The initial state of the tree is not loaded. The first time a top-level node is expanded is when the items for that platform are loaded.



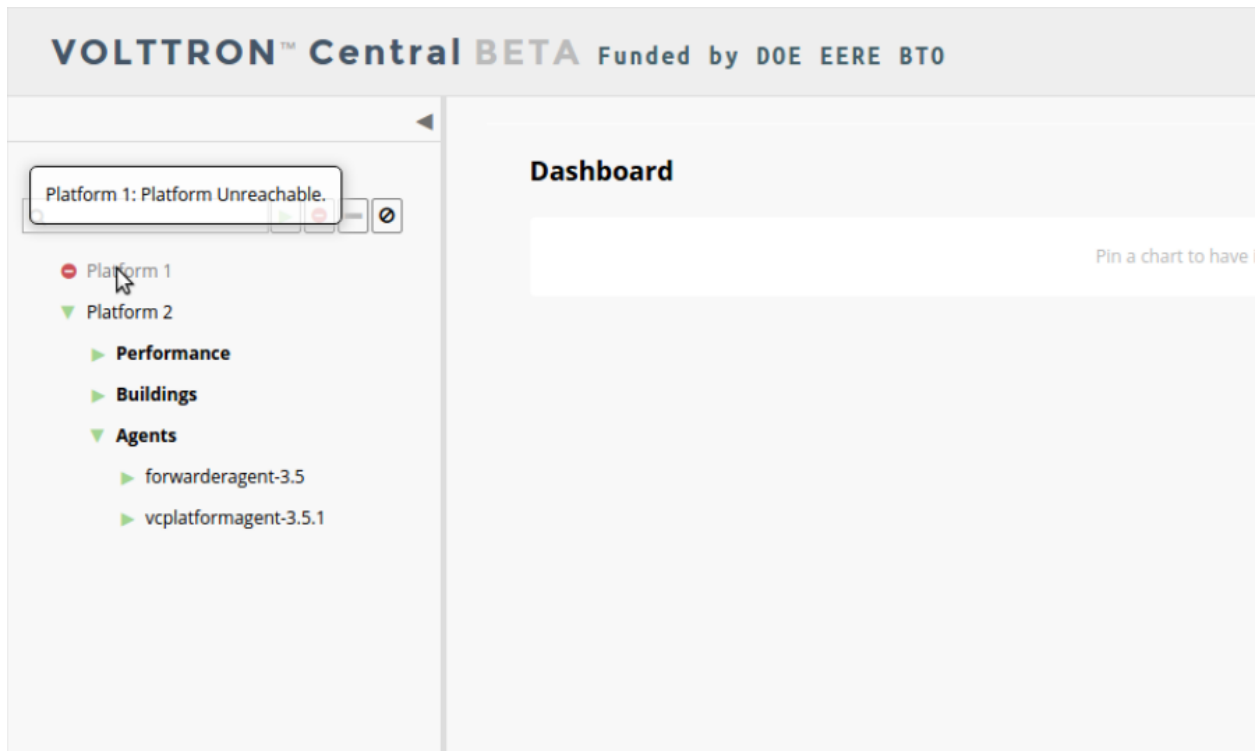
After a platform has been loaded in the tree, all the items under a node can be quickly expanded by double-clicking on the node.

## Health Status

The health status of an item in the tree is indicated by the color and shape next to it. A green triangle means healthy, a red circle means there's a problem, and a gray rectangle means the status can't be determined.

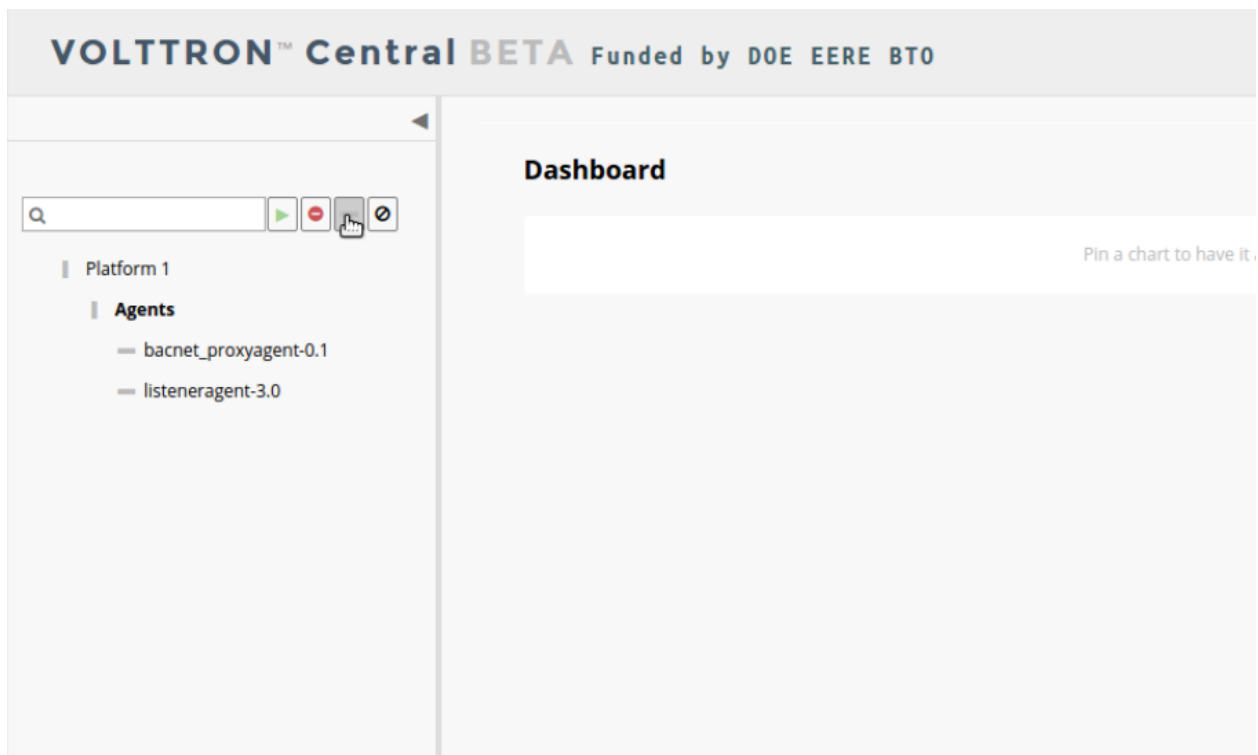
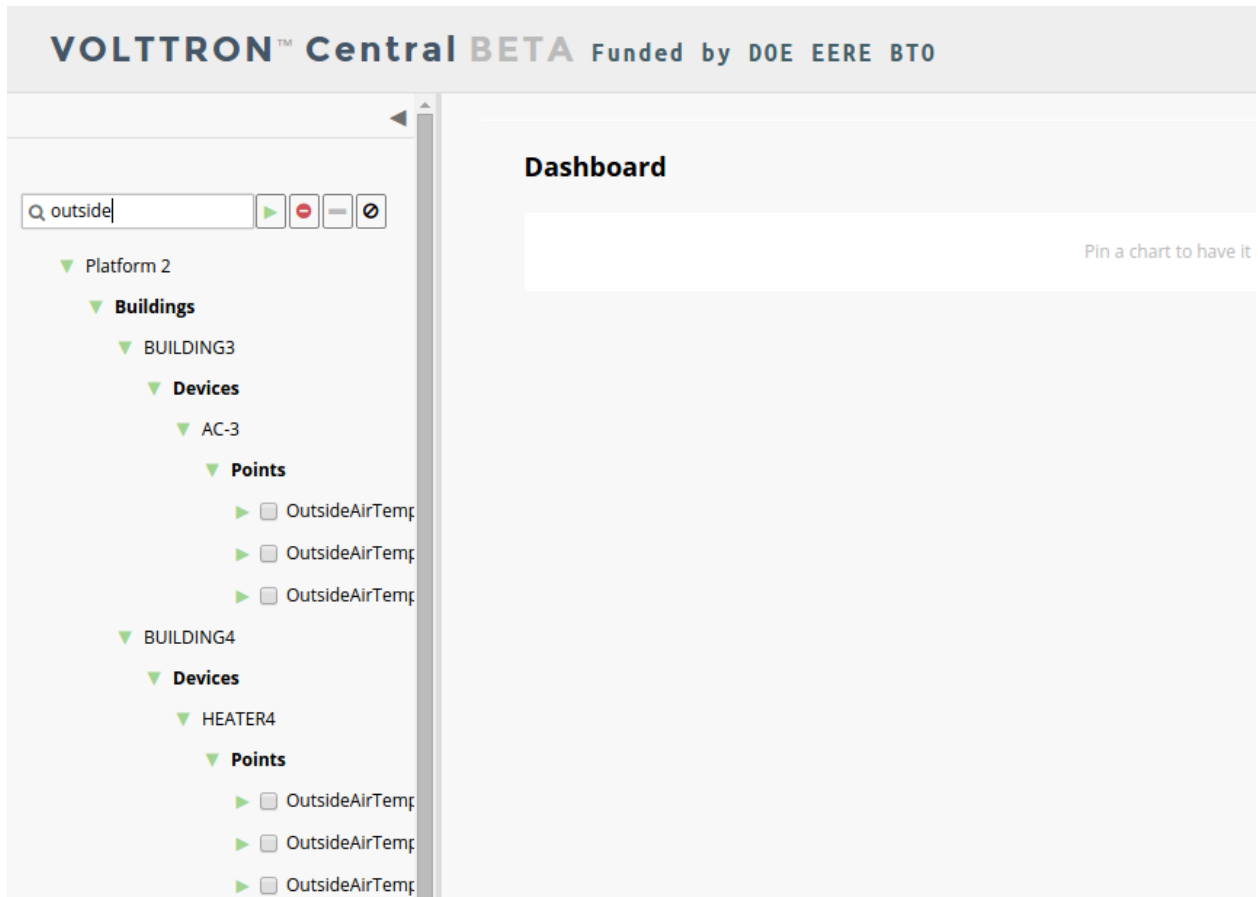
Information about the health status also may be found by hovering the cursor over the item.





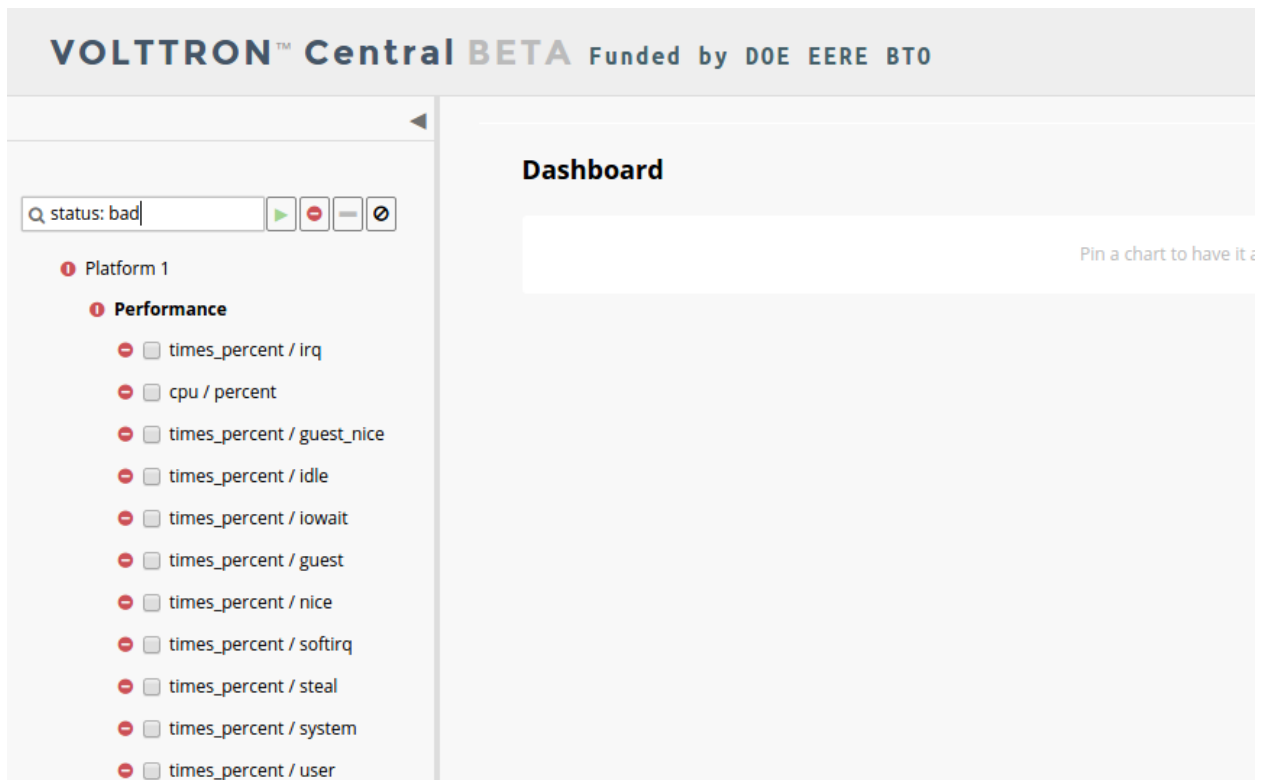
### Filter the Tree

The tree can be filtered by typing in the search field at the top or clicking on a status button next to the search field.



Meta terms such as “status” can also be used as filter keys. Type the keyword “status” followed by a colon, and then

the word “good,” “bad,” or “unknown.”



## Platforms Screen

This screen lists the registered VOLTRON platforms and allows new platforms to be registered by clicking the Register Platform button. Each platform is listed with its unique ID and the number and status of its agents. The platform’s name is a link that can be clicked on to go to the platform management view.



## Platform View

From the platforms screen, click on the name link of a platform to manage it. Managing a platform includes installing, starting, stopping, and removing its agents.

**VOLTTRON™ Central BETA** Funded by DOE EERE BTO

[Dashboard](#) [Platforms](#) [Charts](#) [Log out](#)

**Platforms / Platform 1 (aae27d82-d66b-4c72-9899-be6166a44b5f)**

Agents Name	UUID	Status	Action
bacnet_proxyagent-0.1	6a3be214-27a7-476d-a1d3-f3aa6c66db6e	Never started	<a href="#">Start</a> <a href="#">Remove</a>
listeneragent-3.0	0385b12e-2a5a-4d8a-abbf-6c3b6bab1acb	Never started	<a href="#">Start</a> <a href="#">Remove</a>
sqlhistorianagent-3.5.0	1fcb2c10-cb8e-4715-b248-69b4ad5d62b2	Running (PID 14296)	<a href="#">Stop</a> <a href="#">Remove</a>
vcplatformagent-3.5.1	dc720b2a-403a-4961-b316-74a964e5e038	Running (PID 14263)	<a href="#">Stop</a> <a href="#">Remove</a>
volttroncentralagent-3.5.3	f321f0b1-247a-476a-933b-d03cfc8d81500	Running (PID 12933)	<a href="#">Stop</a> <a href="#">Remove</a>

**Install agents**  
[Choose Files](#) No file chosen

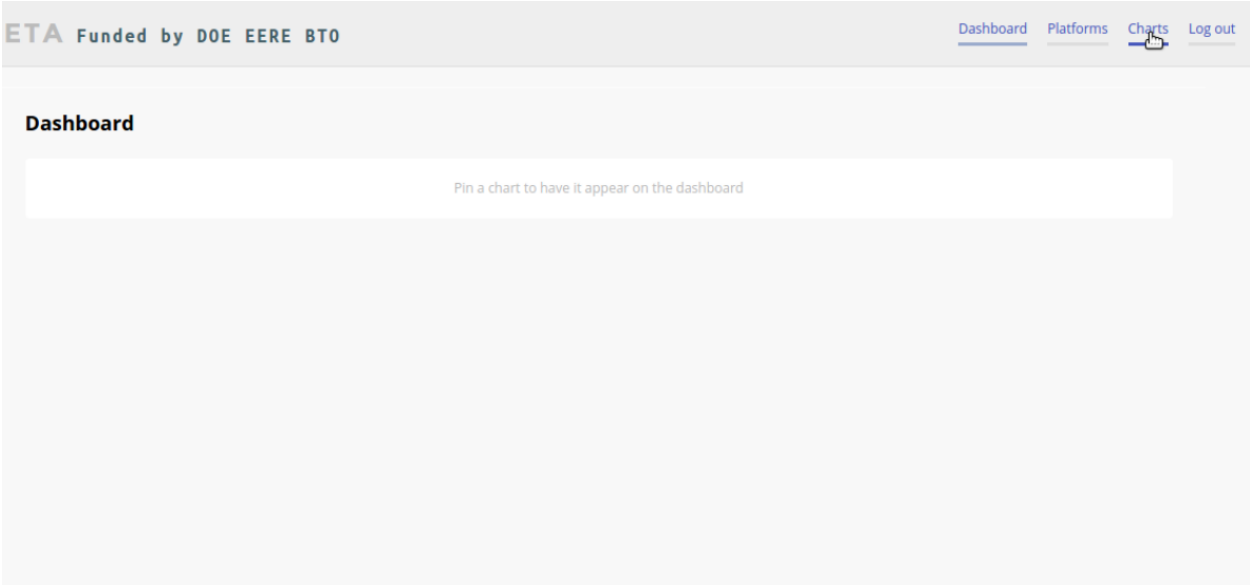
To install a new agent, all you need is the agent's wheel file. Click on the button and choose the file to upload it and install the agent.

To start, stop, or remove an agent, click on the button next to the agent in the list. Buttons may be disabled if the user lacks the correct permission to perform the action or if the action can't be performed on a specific type of agent. For instance, platform agents and VOLTTRON Central agents can't be removed or stopped, but they can be restarted if they've been interrupted.

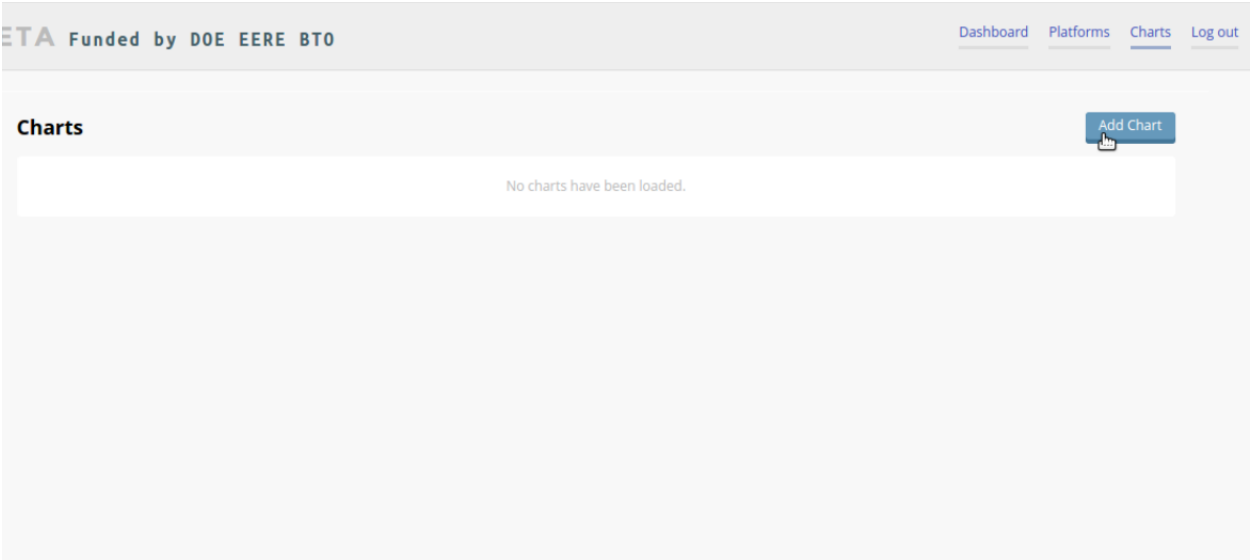
## Add Charts

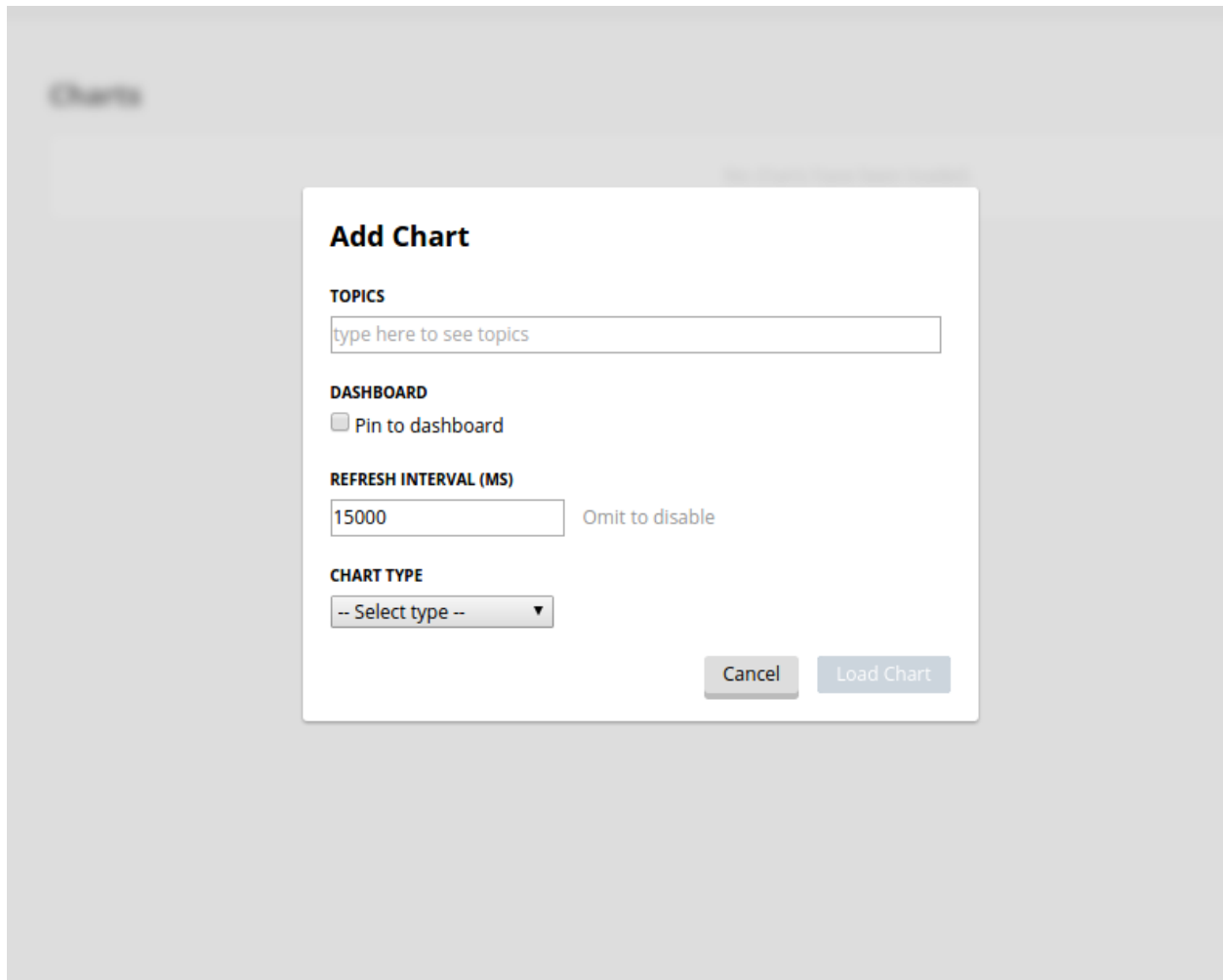
Performance statistics and device points can be added to charts either from the Charts page or from the platforms tree in the side panel.

Click the Charts link at the top-right corner of the screen to go to the Charts page.

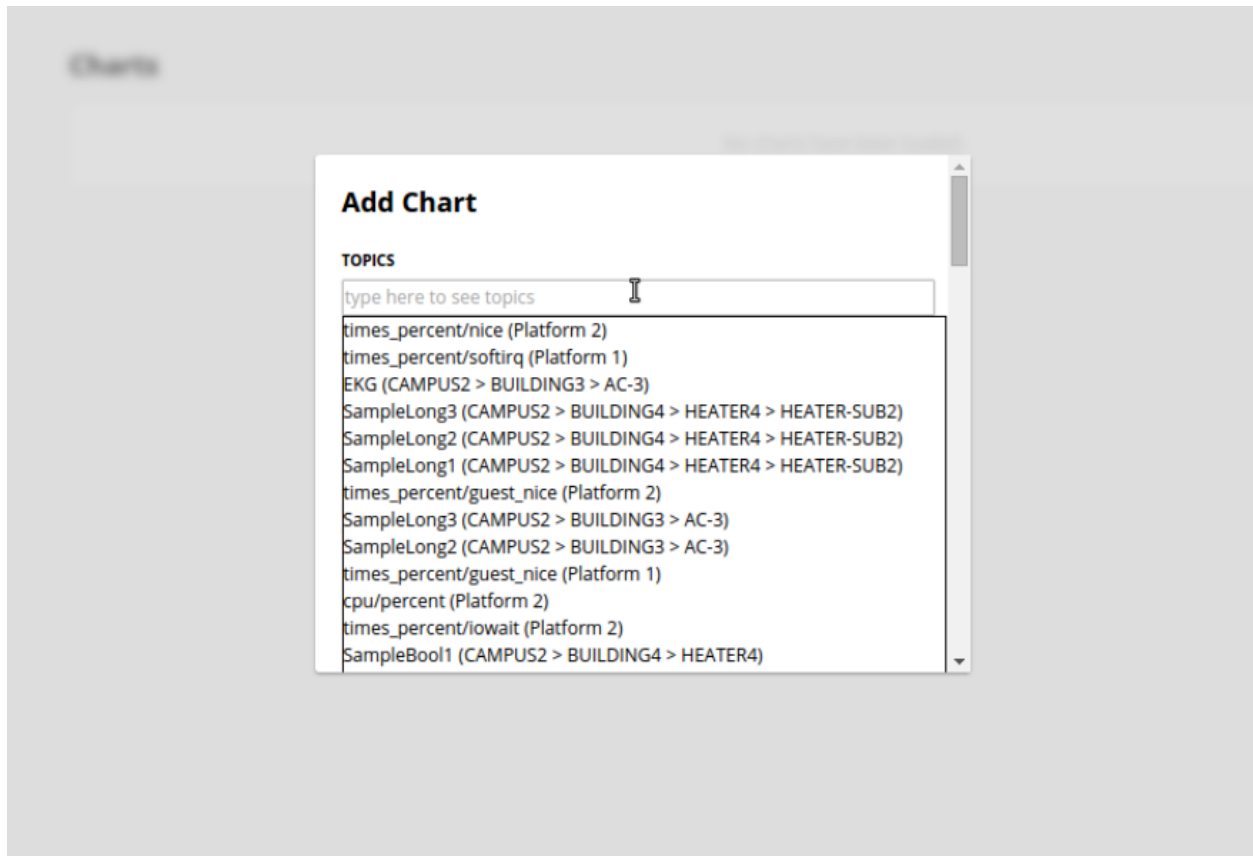


From the Charts page, click the Add Chart button to open the Add Chart window.

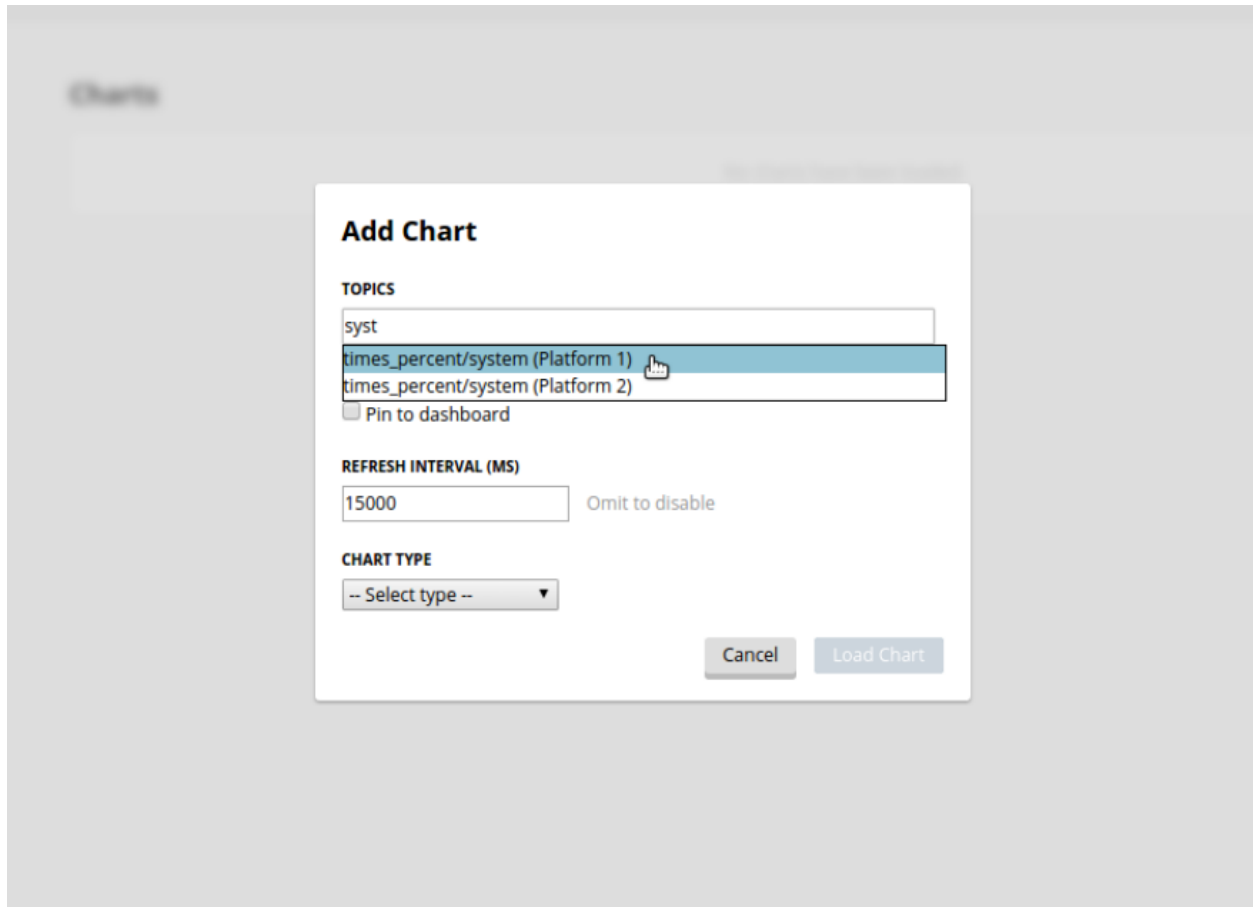




Click in the topics input field to make the list of available chart topics appear.

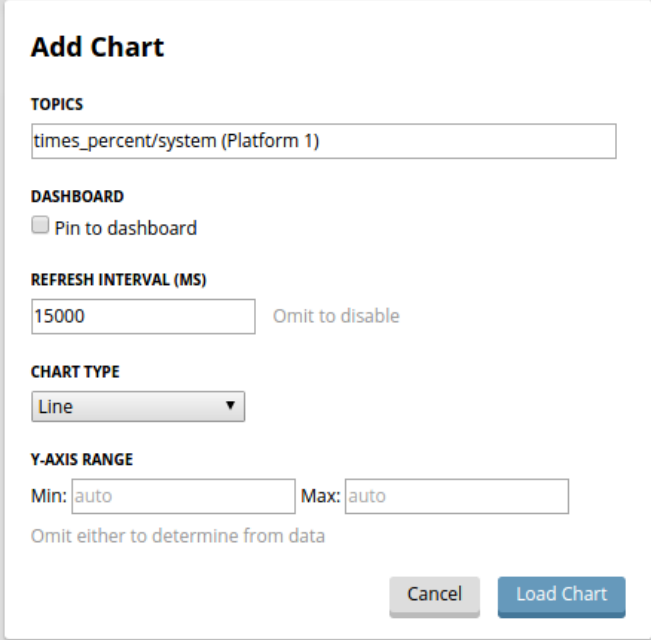


Scroll and select from the list, or type in the field to filter the list, and then select.



Select a chart type and click the Load Chart button to close the window and load the chart.





**Add Chart**

**TOPICS**  
times\_percent/system (Platform 1)

**DASHBOARD**  
☐ Pin to dashboard

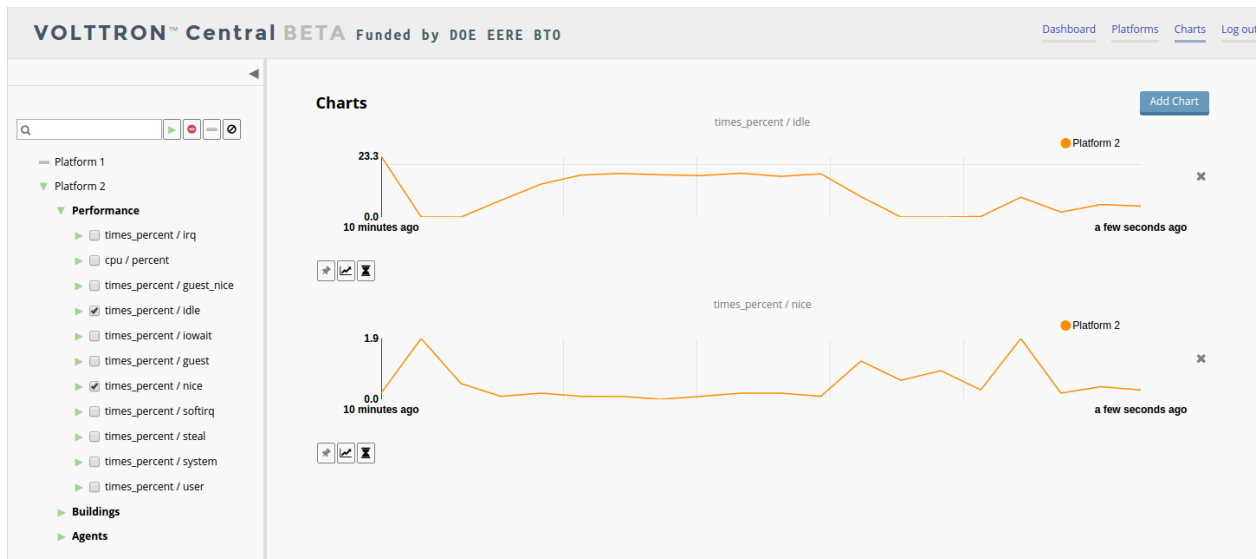
**REFRESH INTERVAL (MS)**  
15000 Omit to disable

**CHART TYPE**  
Line

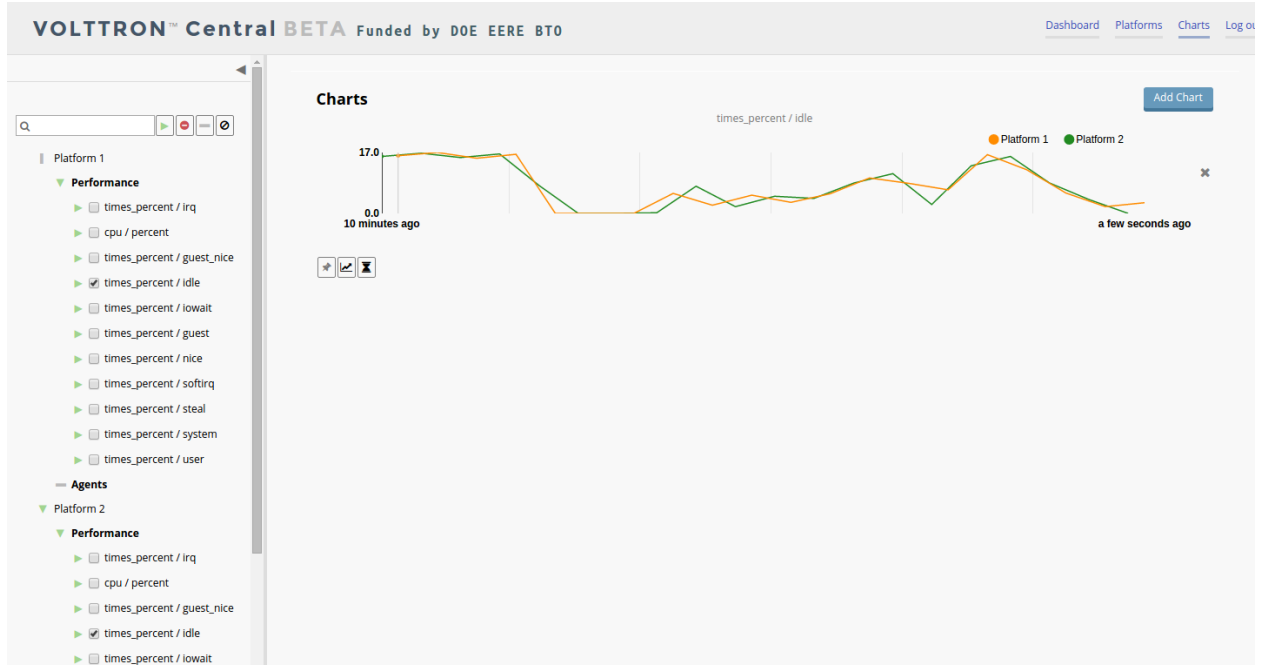
**Y-AXIS RANGE**  
Min: auto Max: auto  
Omit either to determine from data

Cancel Load Chart

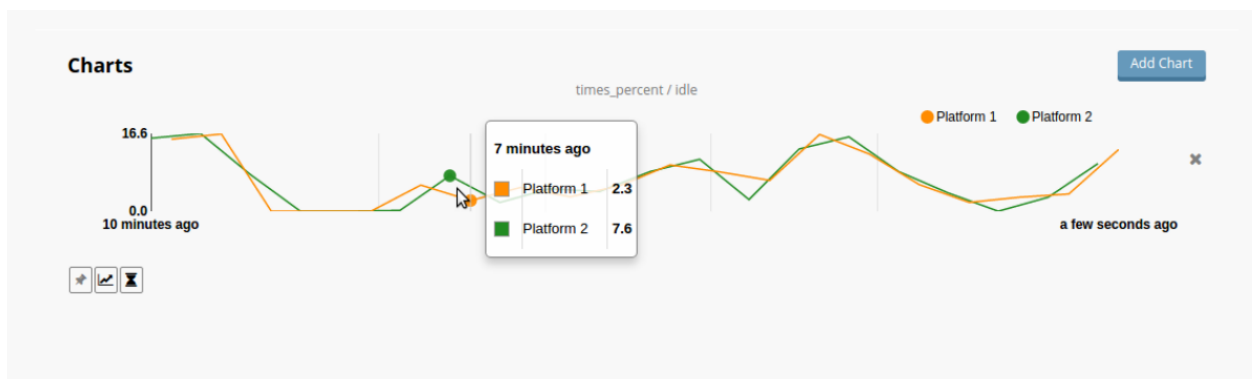
To add charts from the side panel, check boxes next to items in the tree.



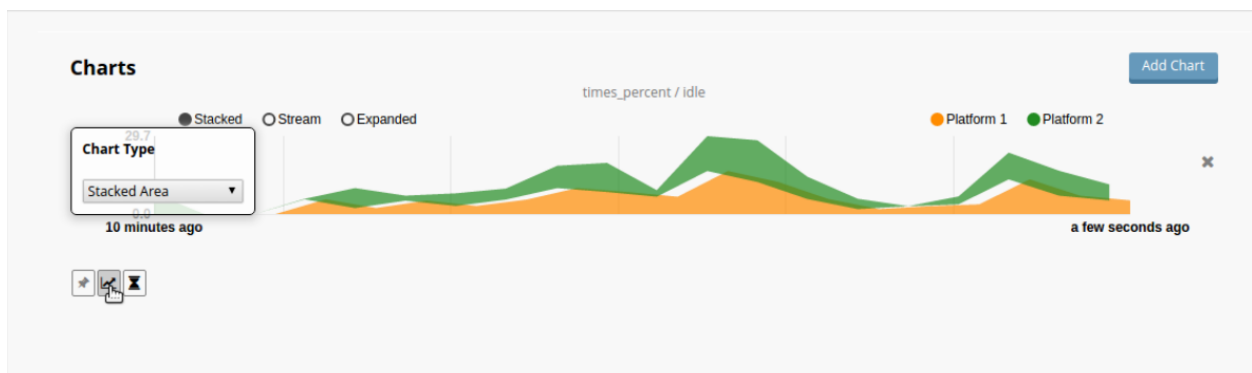
Choose points with the same name from multiple platforms or devices to plot more than one line in a chart.



Move the cursor arrow over the chart to inspect the graphs.

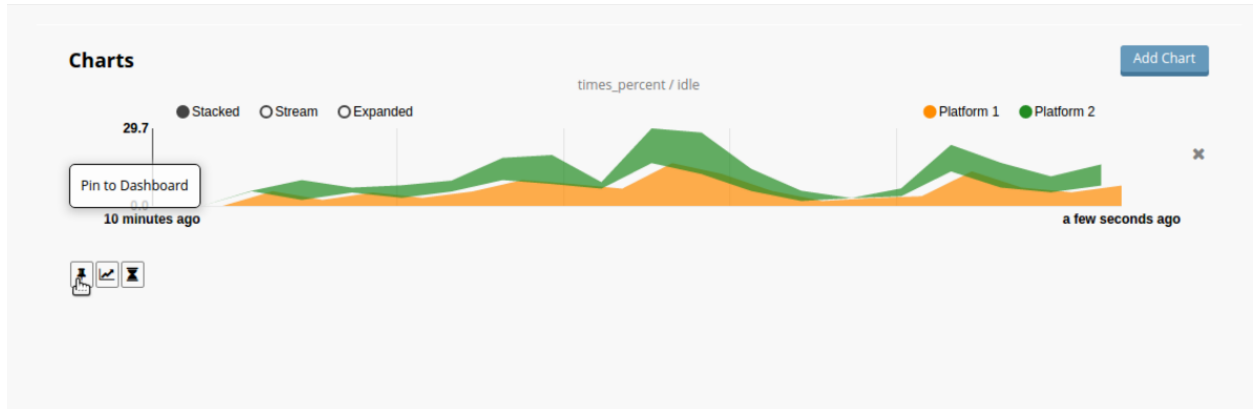


To change the chart's type, click on the Chart Type button and choose a different option.



## Dashboard Charts

To pin a chart to the Dashboard, click the Pin Chart button to toggle it. When the pin image is black and upright, the chart is pinned; when the pin image is gray and diagonal, the chart is not pinned and won't appear on the Dashboard.



Charts that have been pinned to the Dashboard are saved to the database and will automatically load when the user logs in to VOLTTTRON Central. Different users can save their own configurations of dashboard charts.

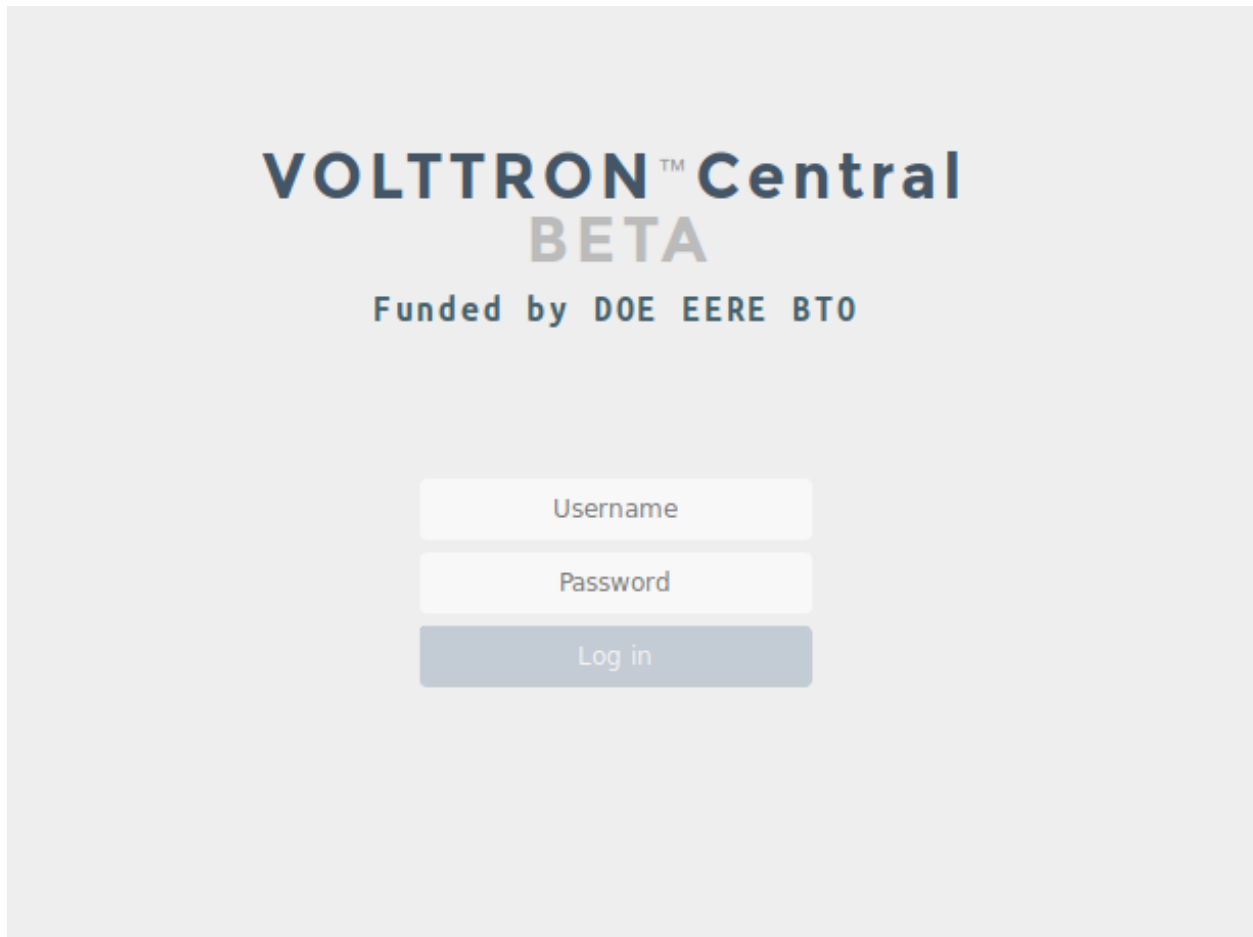
## Remove Charts

To remove a chart, uncheck the box next to the item in the tree or click the X button next to the chart on the Charts page. Removing a chart removes it from the Charts page and the Dashboard.

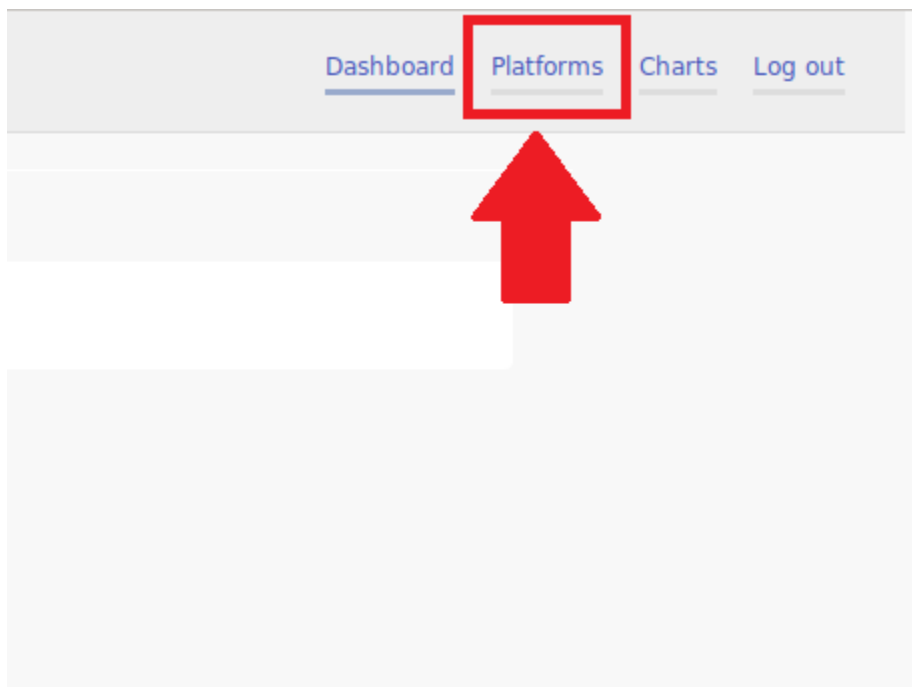
## VOLTTTRON Central

Navigate to <https://volttron-pc:8443/vc/index.html>

Log in using the username and password you set up on the admin web page.



Once you have logged in, click on the Platforms tab in the upper right corner of the window.



Once in the Platforms screen, click on the name of the platform.



You will now see a list of agents. They should all be running.

**Platforms / volttron1 (dm9sdHRYb24xLnBsYXRmb3JtLmFnZW50)**

**Agents**

Name	Identity	UUID	Status	Action
listeneragent-3.2	listeneragent-3.2_1	ff8b93d0-b499-4d66-8304-94ac9fd5d9b4	Running (PID 3842)	<button>Stop</button> <button>Remove</button>
master_driveragent-3.2	platform.driver	30bf6384-3bde-4e28-8bf7-6695448f7b7d	Running (PID 3847)	<button>Stop</button> <button>Remove</button>
sqlhistorianagent-3.7.0	platform.historian	769d570d-e9b5-4263-8d07-31416cccec5c8	Running (PID 3845)	<button>Stop</button> <button>Remove</button>
vcplatformagent-4.8	platform.agent	f03b0ade-d161-4ddb-946b-30e129725584	Running (PID 3844)	<button>Stop</button> <button>Remove</button>
volttroncentralagent-5.0	volttron.central	63f67dd6-a27a-4064-949f-7c6649c43773	Running (PID 3846)	<button>Stop</button> <button>Remove</button>

**Install agents**

No files selected.

For more information on VOLTTRON Central, please see:

- [VOLTTRON Central Management](#)
- [VOLTTRON Central Demo](#)

**Note:** You may want to consider *securing your VC deployment*. Please take particular note of the implementation of a reverse proxy.

## 2.31 Security Considerations of Deployment

Security of computing systems is a complex topic which depends not only on the security of each component, but on how software components interact and on the environment in which they are running. In the subsections here, we will discuss a variety of possible actions which may increase the security of a particular deployment, along with their context.

For more examples and discussion, see the [Publications](#) section of the [VOLTTTRON website](#) where there are a number of Threat Profile reports.

### 2.31.1 Running as a Managed System Process

It is possible that the running VOLTTTRON process could exit undesirably (either due to a bug, or some malicious action). For scenarios where not having the VOLTTTRON process running presents a business risk, it is recommended to follow the *Setting up VOLTTTRON as a System Service* to leverage the host system's process monitoring and management system. Under this configuration, the system will be configured to restart VOLTTTRON in the event that it fails.

---

**Note:** For this configuration to be effective, it is important that the platform is configured such that it automatically starts up in the desired state. In particular, review the installed agents and be sure that agents which should be running are “enabled” and that their priorities are set such that they start in the intended order.

---

There are scenarios when this configuration may not be desired:

1. If a system restarts cleanly after an unexpected failure, it is possible that the underlying issue could go unnoticed (and therefore unresolved). This would happen if a user checks the system and sees it is running but does not have a way to realize that there has been one or more restarts. For development systems it may be desirable to not restart, leaving the system in a failed state which is more likely to be noticed as unusual, and with the failure details still present in the recent logs. Consider the relative value of platform up-time and failure this kind of failure discovery. If both are highly valuable, it may be possible to add extra notifications to the process monitoring system (systemd, initd, or other) so that records are retained while service is restored.
2. For development systems, or systems that are frequently stopped or restarted, it can be more convenient to use the normal start and stop scripts packaged with VOLTTTRON. These do not require the user have system-level permissions and are easily used from the terminal.

### 2.31.2 Run Web Server Behind Proxy

A VOLTTTRON deployment may be web-enabled, allowing various interactions over HTTP. There are many reasons why it is often desirable to deploy an external reverse proxy in front of the system, including:

- Allows regular security patching of the exposed web server independent of the VOLTTTRON process's lifecycle.
- Prevents DDoS and similar attacks, which may successfully impact the web server, from impacting the VOLTTTRON process itself.
- Provides a opportunity for institutional cyber security experts to help maintain a secure and compliant web server configuration without needing to gain VOLTTTRON-specific experience.
- Many other traffic management and filtering options which are documented by the various tools (load balancing, http header management, etc.).

The full complexity of configuring a reverse proxy is outside the scope of this documentation. For reference, two common open source options are [apache httpd](#) and [nginx](#) (relevant portions of their respective documentation pages are linked).

To set up a reverse proxy for VOLTRON using apache, please refer to this document: [Apache Reverse Proxy Setup](#)

### 2.31.3 Monitor for Data Tampering

One common indication of a potential problem, including tampering, would be the presence of out of bounds values. The *Threshold Detection Agent* can be used leveraged to create alerts in the event that a topic has a value which is out of reasonable bounds.

This approach has some limitations, including:

- There can be subtleties in selecting the correct bounds to both ensure issues are seen while minimizing false positives.
- Including value limits adds a significant amount of configuration to maintain, and which is not necessarily high-visibility because it is in another agent.
- Currently there is only support for monitoring for values crossing a threshold, more complex conditional logic would require a custom monitor.
- There could be cases where tampering adjusts values to incorrect but in-bounds values which would not be detected.

### 2.31.4 Limit Publishing on the Devices Topic to Platform Driver

To further reduce the chances of malicious data disrupting your system, you can limit the ability to publish to the “devices” topic to the platform driver only.

To accomplish this, you will need to modify `protected_topics.json`, found in your `$VOLTRON_HOME` directory. In this specific case, you would need to add the topic “devices” and some capability, for example “can\_publish\_to\_devices”.

```
{
  "write-protect": [
    { "topic": "devices", "capabilities": ["can_publish_to_devices"]}
  ]
}
```

Next, using `vctl auth list` get the auth index for the `platform.driver`, and use the command `vctl auth update <index of platform.driver>`. You will get a prompt to update the auth entry. Skip through the prompts until it prompts for capabilities, and add `can_publish_to_devices`.

```
capabilities (delimit multiple entries with comma) []: can_publish_to_devices
```

For more information, refer to the section on *Protecting Pub/Sub Topics*.

### 2.31.5 Limit Access to RPC Methods Using Capabilities

RPC enabled methods provide convenient interfaces between agents. When they are unrestricted however, they open up the potential for malicious agents to cause harm to your system. The best way to prevent this is through the use of capabilities. A capability is a user defined arbitrary string used by an agent to describe its exported RPC method. It is used to limit the access to that RPC method to only those agents who have that capability listed in their authentication record.

To add a capability restriction to an RPC method, the `RPC.allow` decorator is used. For example, to limit those who can call the RPC enabled method “foo” to those with the capability “can\_call\_foo”:

```
@RPC.export
@RPC.allow("can_call_foo")
def foo:
    print("hello")
```

To give an agent permission to access this method, the auth file must be updated. As in the above example for limiting publishing to the devices topic, `vctl` can be used to update the auth file and grant the specific agent permission to access the RPC enabled method.

```
capabilities (delimit multiple entries with comma) []: can_call_foo
```

For a secure system, only add capabilities to the agents that will need to call a specific RPC enabled method, and apply the allow decorator to all RPC enabled methods.

For more information, refer to the section on *VIP Authorization*.

### 2.31.6 Monitoring RabbitMQ Server

Monitoring of RabbitMQ server in deployment setup can be achieved by running RabbitMQ server as a systemd service. RabbitMQ server is configured to run as a systemd service and allow systemd to monitor the status of the service. It can be further configured to detect and restart the RabbitMQ service if it crashes. VOLTTRON agents have the ability to detect when the RabbitMQ server crashes/disconnects and reconnect when it becomes available. In this deployment setup, a VOLTTRON platform will not start/stop the RabbitMQ server.

### 2.31.7 Isolate agent process from core VOLTTRON process

It is possible to run a volttron agent process as a unique unix users and restricting the unix level permission for that agent user such that agent has write access only to its own agent-data folder inside the `VOLTTRON_HOME`. This prevents agents from accidentally or intentionally editing/deleting other volttron process or other agents' files or system files outside of `VOLTTRON_HOME`

For more information, refer to *Agent Isolation Mode: Running Users as unique Unix user*.

## 2.32 Linux System Hardening

### 2.32.1 Introduction

VOLTTRON is built with modern security principles in mind [security-wp] and implements many security features for hosted agents. However, VOLTTRON is deployed on top of a Linux-based operating system and evaluating the security of a deployment must include the configuration of the host system itself, as well as any other applications deployed on the system, both of which provide additional attack surface and failure opportunities.

There is no such thing as “a secure system.” Rather, any computing system must be evaluated in the context of its deployment environment with considerations for assurance of confidentiality, integrity, and availability. The impact of a compromised system must be considered, along with the costs associated with risk mitigation. Threat profile analyses have been completed for several VOLTTRON deployment configurations; the reports are available on the [VOLTTRON website's publications section](#).



## 2.32.2 Recommendations

The VOLTTRON team recommends a risk-based cyber security approach that considers each risk, the impact of an exploit or failure, and the costs associated with the available mitigation strategies. Based on this evaluation, a set of mitigations can be identified to meet deployment requirements.

In many cases, the first step is to coordinate with the cyber security team at your institution; they should be able to help you with risk assessment and mitigation strategies, as well as understanding any relevant regulatory requirements.

For continuously running and production-like systems, one common area of concern is hardening of the host operating system. Instructions are maintained by OpenSCAP for a large number of operating systems and guides are available for a [range of common linux distributions](#). You are encouraged to select the operating system and profile corresponding to your security requirements. The guides there provide instruction for compliance in regulated environments, but are also appropriate in less regulated environments where risk levels are equivalent.

It is also important to evaluate any other applications running on the same system. In addition to the potential for exploitation or failure of the individual application, it is important to consider the ways in which the risks associated with one application may expose new risks in another application. For example, if a system is running a webserver which is exploited in a way that provides unauthorized access to the host system, then the VOLTTRON system is now exposed to attack from local users.

## 2.33 Deployment Recipes (Multi-Machine)

For more details about ansible recipes for scalable deployment strategies, see [readthedocs](#) pages of the [VOLTTRON ansible repository](#)

## 2.34 ActuatorAgent

### 2.34.1 actuator package

#### actuator.agent module

The Actuator Agent is used to manage write access to devices. Other agents may request scheduled times, called Tasks, to interact with one or more devices.

Agents may interact with the ActuatorAgent via either PUB/SUB or RPC, but it is recommended agents use RPC to interact with the ActuatorAgent.

The PUB/SUB interface remains primarily for VOLTTRON 2.0 agents.

The Actuator Agent also triggers the heart beat on devices whose drivers are configured to do so.

#### ActuatorAgent Configuration

**“schedule\_publish\_interval”** Interval between published schedule announcements in seconds. Defaults to 30. See *Schedule State Publishes*.

**“preempt\_grace\_time”** Minimum time given to Tasks which have been preempted to clean up in seconds. Defaults to 60.

**“schedule\_state\_file”** File used to save and restore Task states if the ActuatorAgent restarts for any reason. File will be created if it does not exist when it is needed.

**“heartbeat\_interval”** How often to send a heartbeat signal to all devices in seconds. Defaults to 60.

## Sample configuration file

```
{  
    "schedule_publish_interval": 30,  
    "schedule_state_file": "actuator_state.pickle"  
}
```

## Workflow

Agents interact with the Actuator Agent following these basic steps:

- Schedule one or more blocks of time with one or more devices. This is

called a Task. - If needed wait until a block of time starts. - Set one or more values on the reserved devices. - Cancel the schedule when finished.

## Scheduling a New Task

*RPC interface PUB/SUB interface*

Creating a Task requires four things:

- The requester of the Task. This is the Agent's ID.
- A name for the Task.
- The Task's priority.
- A list of devices and time ranges for each device.

## Task Priority

There are three valid priority levels:

**“HIGH”** This Task cannot be preempted under any circumstance. This Task may preempt other conflict-ing preemptable Tasks.

**“LOW”** This Task cannot be preempted **once it has started**. A Task is considered started once the earliest time slot on any device has been reached. This Task may not preempt other Tasks.

**“LOW\_PREEMPT”** This Task may be preempted at any time. If the Task is preempted once it has begun running any current time slots will be given a grace period (configurable in the ActuatorAgent configuration file, defaults to 60 seconds) before being revoked. This Task may not preempt other Tasks.

Whenever a Task is preempted the Actuator Agent will publish a message to `devices/actuators/schedule/result` indicating that the Task has been cancelled due to being preempted. See [Preemption Publishes](#)

Even when using the RPC interface agents which schedule low priority tasks may need to subscribe to `devices/actuators/schedule/result` to learn when its Tasks are canceled due to preemption.

## Device Schedule

The device schedule is a list of block of time for each device.

Both the RPC and PUB/SUB interface accept schedules in the following format:

```
[
  ["campus/building/device1", #First time slot.
   "2013-12-06 16:00:00",    #Start of time slot.
   "2013-12-06 16:20:00"],   #End of time slot.
  ["campus/building/device1", #Second time slot.
   "2013-12-06 18:00:00",    #Start of time slot.
   "2013-12-06 18:20:00"],   #End of time slot.
  ["campus/building/device2", #Third time slot.
   "2013-12-06 16:00:00",    #Start of time slot.
   "2013-12-06 16:20:00"],   #End of time slot.
  #etc...
]
```

### Note: Points on Task Scheduling

- Task id and requester id (agentid) should be a non empty value of type string
- A Task schedule must have at least one time slot.
- The start and end times are parsed with `dateutil's date/time parser`. **The default string representation of a python datetime object will parse without issue.**
- Two Tasks are considered conflicted if at least one time slot on a device from one task overlaps the time slot of the other on the same device.
- The end time of one time slot can be the same as the start time of another time slot for the same device. This will not be considered a conflict. For example, `time_slot1(device0, time1, time2)` and `time_slot2(device0,time2, time3)` are not considered a conflict
- A request must not conflict with itself.

## New Task Response

Both the RPC and PUB/SUB interface respond to requests with the result in the following format:

```
{
  'result': <'SUCCESS', 'FAILURE'>,
  'info': <Failure reason string, if any>,
  'data': <Data about the failure or cancellation, if any>
}
```

The PUB/SUB interface will respond to requests on the `devices/actuators/schedule/result` topic.

The PUB/SUB interface responses will have the following header:

```
{
  'type': 'NEW_SCHEDULE'
  'requesterID': <VIP Identity of requesting agent>,
  'taskID': <Task ID from the request>
}
```

## Failure Reasons

In many cases the ActuatorAgent will try to give good feedback as to why a request failed. The type of failure will populate “info” item as a string.

Some of these errors only apply to the PUB/SUB interface.

## General Failures

“INVALID\_REQUEST\_TYPE” Request type was not “NEW\_SCHEDULE” or “CANCEL\_SCHEDULE”.

“MISSING\_TASK\_ID” Failed to supply a taskID.

“MISSING\_AGENT\_ID” AgentID not supplied.

## Task Schedule Failures

“TASK\_ID\_ALREADY\_EXISTS “ The supplied taskID already belongs to an existing task.

“MISSING\_PRIORITY” Failed to supply a priority for a Task schedule request.

“INVALID\_PRIORITY” Priority not one of “HIGH”, “LOW”, or “LOW\_PREEMPT”.

“MALFORMED\_REQUEST\_EMPTY” Request list is missing or empty.

“REQUEST\_CONFLICTS\_WITH\_SELF” Requested time slots on the same device overlap.

“MALFORMED\_REQUEST” Reported when the request parser raises an unhandled exception. The exception name and info are appended to this info string.

“CONFLICTS\_WITH\_EXISTING\_SCHEDULES” This schedule conflict with an existing schedules that it cannot preempt. The data item for the results will contain info about the conflicts in this form:

```
{
  '<agentID1>':
  {
    '<taskID1>':
    [
      ["campus/building/device1",
       "2013-12-06 16:00:00",
       "2013-12-06 16:20:00"],
      ["campus/building/device1",
       "2013-12-06 18:00:00",
       "2013-12-06 18:20:00"]
    ]
    '<taskID2>': [...]
  }
  '<agentID2>': {...}
}
```

## Device Interaction

### Getting values

*RPC interface PUB/SUB interface*

While a device driver for a device will periodically broadcast the state of a device you may want an up to the moment value for point on a device.

As of VOLTTRON 3.5 it is no longer required to have the device scheduled before you can use this interface.

### Setting Values

*RPC interface PUB/SUB interface*

Failure to schedule the device first will result in an error.

### Errors Setting Values

If there is an error the RPC interface will raise an exception and the PUB/SUB interface will publish to

devices/actuators/error/<full device path>/<actuation point>

The header of the publish will take this form:

```
{
  'requesterID': <VIP Identity of requesting agent>
}
```

and a message body in this form:

```
{
  'type': <Class name of the exception raised by the request>
  'value': <Specific info about the error>
}
```

### Common Error Types

**LockError** Raised when a request is made when we do not have permission to use a device. (Forgot to schedule, preempted and we did not handle the preemption message correctly, ran out of time in time slot, etc...)

**ValueError** Message missing (PUB/SUB only) or is the wrong data type.

Most other error types involve problems with communication between the VOLTTRON device drivers and the device itself.

## Reverting Values and Devices to a Default State

As of VOLTTRON 3.5 device drivers are now required to support reverting to a default state. The exact mechanism used to accomplish this is driver specific.

Failure to schedule the device first will result in a `LockError`.

```
RPC revert value interface PUB/SUB revert value interface
```

```
RPC revert device interface PUB/SUB revert device interface
```

## Canceling a Task

```
RPC interface PUB/SUB interface
```

Cancelling a Task requires two things:

- The original requester of the Task. The agent's VIP identity automatically replaces provided parameters.
- The name of the Task.

## Cancel Task Response

Both the RPC and PUB/SUB interface respond to requests with the result in the following format:

```
{
  'result': <'SUCCESS', 'FAILURE'>,
  'info': <Failure reason, if any>,
  'data': {}
}
```

---

**Note:** There are some things to be aware of when canceling a schedule:

- The taskID must match the original value from the original request header. - After a Tasks time has passed there is no need to cancel it. Doing so will result in a “TASK\_ID\_DOES\_NOT\_EXIST” error.

---

If an attempt cancel a schedule fails than the “info” item will have any of the following values:

- “TASK\_ID\_DOES\_NOT\_EXIST” Trying to cancel a Task which does not exist. This error can also occur when trying to cancel a finished Task.
- “AGENT\_ID\_TASK\_ID\_MISMATCH” A different agent ID is being used when trying to cancel a Task.

## Preemption Publishes

If a Task is preempted it will publish the following to the `devices/actuators/schedule/result` topic:

```
{
  'result': 'PREEMPTED',
  'info': None,
  'data': {
    'agentID': <Agent ID of preempting task>,
    'taskID': <Task ID of preempting task>
  }
}
```

Along with the following header:

```
{
  'type': 'CANCEL_SCHEDULE',
  'requesterID': <VIP id associated with the preempted Task>,
  'taskID': <Task ID of the preempted Task>
}
```

**Note:** Remember that if your “LOW\_PREEMPT” Task has already started and is preempted you have a grace period to do any clean up before losing access to the device.

## Schedule State Publishes

Periodically the ActuatorAgent will publish the state of all currently reserved devices. The first publish for a device will happen exactly when the reserved block of time for a device starts.

For each device the ActuatorAgent will publish to an associated topic:

`devices/actuators/schedule/announce/<full device path>`

With the following header:

```
{
  'requesterID': <VIP identity of Agent with access>,
  'taskID': <Task associated with the time slot>
  'window': <Seconds remaining in the time slot>
}
```

The frequency of the updates is configurable with the “`schedule_publish_interval`” setting in the configuration.

```
class actuator.agent.ActuatorAgent (heartbeat_interval=60,          sched-
                                   ul_ publish_interval=60,        preempt_grace_time=60,
                                   driver_vip_identity='platform.driver', al-
                                   low_no_lock_write=True, **kwargs)
```

Bases: `volttron.platform.vip.agent.Agent`

The Actuator Agent regulates control of devices by other agents. Agents request a schedule and then issue commands to the device through this agent.

The Actuator Agent also sends out the signal to drivers to trigger a device heartbeat.

### Parameters

- **heartbeat\_interval** (*float*) – Interval in seconds to send out a heartbeat to devices.

- **schedule\_publish\_interval** (*float*) – Interval in seconds to publish the currently active schedules.
- **schedule\_state\_file** – Name of the file to save the current schedule state to. This file is updated every time a schedule changes.
- **preempt\_grace\_time** (*float*) – Time in seconds after a schedule is preempted before it is actually cancelled.
- **driver\_vip\_identity** (*str*) – VIP identity of the Platform Driver Agent.

**configure** (*config\_name, action, contents*)

**get\_multiple\_points** (*topics, \*\*kwargs*)

RPC method

Get multiple points on multiple devices. Makes a single RPC call to the platform driver per device.

**Parameters**

- **topics** – List of topics or list of [device, point] pairs.
- **\*\*kwargs** – Any driver specific parameters

**Returns** Dictionary of points to values and dictionary of points to errors

**Warning:** This method does not require that all points be returned successfully. Check that the error dictionary is empty.

**get\_point** (*topic, point=None, \*\*kwargs*)

RPC method

Gets up to date value of a specific point on a device. Does not require the device be scheduled.

**Parameters**

- **topic** (*str*) – The topic of the point to grab in the format <device topic>/<point name>  
Only the <device topic> if point is specified.
- **point** – Point on the device. Uses old behavior if omitted.
- **\*\*kwargs** – Any driver specific parameters

**Returns** point value

**Return type** any base python type

**handle\_get** (*peer, sender, bus, topic, headers, message*)

Requests up to date value of a point.

To request a value publish a message to the following topic:

devices/actuators/get/<device path>/<actuation point>

with the following header:

```
{
  'requesterID': <Ignored, VIP Identity used internally>
}
```

The ActuatorAgent will reply on the **value** topic for the actuator:

devices/actuators/value/<full device path>/<actuation point>



with the message set to the value the point.

**handle\_revert\_device** (*peer, sender, bus, topic, headers, message*)

Revert all the writable values on a device.

To revert a device publish a message to the following topic:

devices/actuators/revert/device/<device path>

with the following header:

```
{
  'requesterID': <Ignored, VIP Identity used internally>
}
```

The ActuatorAgent will reply on the **value** topic for the actuator:

devices/actuators/reverted/device/<full device path>

to indicate that a point was reverted.

Errors will be published on

devices/actuators/error/<full device path>/<actuation point>

with the same header as the request.

**handle\_revert\_point** (*peer, sender, bus, topic, headers, message*)

Revert the value of a point.

To revert a value publish a message to the following topic:

actuators/revert/point/<device path>/<actuation point>

with the following header:

```
{
  'requesterID': <Ignored, VIP Identity used internally>
}
```

The ActuatorAgent will reply on

devices/actuators/reverted/point/<full device path>/<actuation point>

This is to indicate that a point was reverted.

Errors will be published on

devices/actuators/error/<full device path>/<actuation point>

with the same header as the request.

**handle\_schedule\_request** (*peer, sender, bus, topic, headers, message*)

Schedule request pub/sub handler

An agent can request a task schedule by publishing to the devices/actuators/schedule/request topic with the following header:

```
{
  'type': 'NEW_SCHEDULE',
  'requesterID': <Ignored, VIP Identity used internally>,
  'taskID': <unique task ID>, #The desired task ID for this
  task. It must be unique among all other scheduled tasks.
  'priority': <task priority>, #The desired task priority,
```

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```

    must be 'HIGH', 'LOW', or 'LOW_PREEMPT'
}

```

The message must describe the blocks of time using the format described in *Device Schedule*.

A task may be canceled by publishing to the `devices/actuators/schedule/request` topic with the following header:

```

{
  'type': 'CANCEL_SCHEDULE',
  'requesterID': <Ignored, VIP Identity used internally>,
  'taskID': <unique task ID>, #The task ID for the canceled Task.
}

```

**requesterID** The name of the requesting agent. Automatically replaced with VIP id.

**taskID** The desired task ID for this task. It must be unique among all other scheduled tasks.

**priority** The desired task priority, must be 'HIGH', 'LOW', or 'LOW\_PREEMPT'

No message is requires to cancel a schedule.

**handle\_set** (*peer, sender, bus, topic, headers, message*)

Set the value of a point.

To set a value publish a message to the following topic:

`devices/actuators/set/<device path>/<actuation point>`

with the following header:

```

{
  'requesterID': <Ignored, VIP Identity used internally>
}

```

The ActuatorAgent will reply on the **value** topic for the actuator:

`devices/actuators/value/<full device path>/<actuation point>`

with the message set to the value the point.

Errors will be published on

`devices/actuators/error/<full device path>/<actuation point>`

with the same header as the request.

**request\_cancel\_schedule** (*requester\_id, task\_id*)

RPC method

Requests the cancellation of the specified task id.

#### Parameters

- **requester\_id** (*str*) – Ignored, VIP Identity used internally
- **task\_id** (*str*) – Task name.

**Returns** Request result

**Return type** `dict`

**Return Values**

The return values are described in *Cancel Task Response*.

**request\_new\_schedule** (*requester\_id, task\_id, priority, requests*)  
RPC method

Requests one or more blocks on time on one or more device.

#### Parameters

- **requester\_id** – Ignored, VIP Identity used internally
- **task\_id** – Task name.
- **priority** – Priority of the task. Must be either “HIGH”, “LOW”,

or “LOW\_PREEMPT” :param requests: A list of time slot requests in the format described in *Device Schedule*.

**Returns** Request result

**Return type** dict

**Return Values** The return values are described in *New Task Response*.

**revert\_device** (*requester\_id, topic, \*\*kwargs*)  
RPC method

Reverts all points on a device to a default state. Requires the device be scheduled by the calling agent.

#### Parameters

- **requester\_id** (*str*) – Ignored, VIP Identity used internally
- **topic** (*str*) – The topic of the device to revert
- **\*\*kwargs** – Any driver specific parameters

**Warning:** Calling without previously scheduling a device and not

**within** the time allotted will raise a LockError

**revert\_point** (*requester\_id, topic, point=None, \*\*kwargs*)  
RPC method

Reverts the value of a specific point on a device to a default state. Requires the device be scheduled by the calling agent.

#### Parameters

- **requester\_id** (*str*) – Ignored, VIP Identity used internally
- **topic** (*str*) – The topic of the point to revert in the format <device topic>/<point name>
- **\*\*kwargs** – Any driver specific parameters

**Warning:** Calling without previously scheduling a device and not

**within** the time allotted will raise a LockError

**scrape\_all** (*topic*)

RPC method

Get all points from a device.

**Parameters** **topic** – Device topic

**Returns** Dictionary of points to values

**set\_multiple\_points** (*requester\_id, topics\_values, \*\*kwargs*)

RPC method

Set multiple points on multiple devices. Makes a single RPC call to the platform driver per device.

**Parameters**

- **requester\_id** – Ignored, VIP Identity used internally
- **topics\_values** – List of (topic, value) tuples
- **\*\*kwargs** – Any driver specific parameters

**Returns** Dictionary of points to exceptions raised. If all points were set successfully an empty dictionary will be returned.

**Warning:** calling without previously scheduling *all* devices and not within the time allotted will raise a `LockError`

**set\_point** (*requester\_id, topic, value, point=None, \*\*kwargs*)

RPC method

Sets the value of a specific point on a device. Requires the device be scheduled by the calling agent.

**Parameters**

- **requester\_id** (*str*) – Ignored, VIP Identity used internally
- **topic** (*str*) – The topic of the point to set in the format <device topic>/<point name>  
Only the <device topic> if point is specified.
- **value** (*any basic python type*) – Value to set point to.
- **point** (*str*) – Point on the device. Uses old behavior if omitted.
- **\*\*kwargs** – Any driver specific parameters

**Returns** value point was actually set to. Usually invalid values cause an error but some drivers (MODBUS) will return a different value with what the value was actually set to.

**Return type** any base python type

**Warning:** Calling without previously scheduling a device and not

**within** the time allotted will raise a `LockError`

**exception** `actuator.agent.LockError`

Bases: `Exception`

Error raised when the user does not have a device scheduled and tries to use methods that require exclusive access.

`actuator.agent.actuator_agent` (*config\_path, \*\*kwargs*)

Parses the Actuator Agent configuration and returns an instance of the agent created using that configuration.

**Parameters** `config_path` (*str*) – Path to a configuration file.

**Returns** Actuator Agent

**Return type** *ActuatorAgent*

`actuator.agent.main()`

Main method called to start the agent.

### actuator.scheduler module

**class** `actuator.scheduler.DeviceState` (*agent\_id, task\_id, time\_remaining*)

Bases: `tuple`

**property** `agent_id`

Alias for field number 0

**property** `task_id`

Alias for field number 1

**property** `time_remaining`

Alias for field number 2

**class** `actuator.scheduler.RequestResult` (*success, data, info\_string*)

Bases: `tuple`

**property** `data`

Alias for field number 1

**property** `info_string`

Alias for field number 2

**property** `success`

Alias for field number 0

**class** `actuator.scheduler.Schedule`

Bases: `object`

**check\_availability** (*time\_slot*)

**finished** (*now*)

**get\_conflicts** (*other*)

Returns a list of our time\_slices that conflict with the other schedule

**get\_current\_slot** (*now*)

**get\_next\_event\_time** (*now*)

Run this to know when the next state change is going to happen with this schedule

**get\_schedule** ()

**make\_current** (*now*)

Should be called before working with a schedule. Updates the state to the schedule to eliminate stuff in the past.

**prune\_to\_current** (*grace\_time, now*)

Use this to prune a schedule due to preemption.

**schedule\_slot** (*time\_slot*)

**exception** `actuator.scheduler.ScheduleError`

Bases: `Exception`

```
class actuator.scheduler.ScheduleManager(grace_time, now=None,  
                                         save_state_callback=None, ini-  
                                         tial_state_string=None)  
  
    Bases: object  
  
    cancel_task (agent_id, task_id, now)  
  
    get_next_event_time (now)  
  
    get_schedule_state (now)  
  
    load_state (now, initial_state_string)  
  
    request_slots (agent_id, id_, requests, priority, now=None)  
  
    save_state (now)  
  
    set_grace_period (seconds)  
  
class actuator.scheduler.Task(agent_id, priority, requests)  
    Bases: object  
  
    STATE_FINISHED = 'FINISHED'  
  
    STATE_PREEMPTED = 'PREEMPTED'  
  
    STATE_PRE_RUN = 'PRE_RUN'  
  
    STATE_RUNNING = 'RUNNING'  
  
    change_state (new_state)  
  
    check_can_preempt_other (other)  
  
    get_conflicts (other)  
  
    get_current_slots (now)  
  
    get_next_event_time (now)  
  
    make_current (now)  
  
    populate_schedule (requests)  
  
    preempt (grace_time, now)  
        Return true if there are time slots that have a grace period left  
  
class actuator.scheduler.TimeSlice(start=None, end=None)  
    Bases: object  
  
    contains_include_start (other)  
        Similar to == or “in” but includes time == self.start  
  
    property end  
  
    property start  
  
    stretch_to_include (time_slice)
```

## 2.34.2 Actuator Agent

The Actuator Agent is used to manage write access to devices. Other agents may request scheduled times, called Tasks, to interact with one or more devices.

Agents may interact with the ActuatorAgent via either PUB/SUB or RPC, but it is recommended agents use RPC to interact with the ActuatorAgent. For an example of an agent using RPC to interact with the ActuatorAgent, see the [SchedulerExample agent](#) from the Volttron repository.

The PUB/SUB interface remains primarily for VOLTTRON 2.0 agents.

The Actuator Agent also triggers the heart beat on devices whose drivers are configured to do so.

### ActuatorAgent Configuration

1. “schedule\_publish\_interval”  
Interval between published schedule announcements in seconds. Defaults to 30.
2. “preempt\_grace\_time”  
Minimum time given to Tasks which have been preempted to clean up in seconds. Defaults to 60.
3. “schedule\_state\_file”  
File used to save and restore Task states if the ActuatorAgent restarts for any reason. File will be created if it does not exist when it is needed.
4. “heartbeat\_interval”  
How often to send a heartbeat signal to all devices in seconds. Defaults to 60.

### Sample configuration file

```
{
  "schedule_publish_interval": 30,
  "schedule_state_file": "actuator_state.pickle"
}
```

## 2.35 BACnetProxy

### 2.35.1 bacnet\_proxy package

**bacnet\_proxy.agent module**

### 2.35.2 BACnet Proxy Agent

Communication with BACnet device on a network happens via a single virtual BACnet device. In VOLTTRON driver framework, we use a separate agent specifically for communicating with BACnet devices and managing the virtual BACnet device.

## Dependencies

1. The BACnet Proxy agent requires the BACPytes package. This package can be installed in an activated environment with:

```
pip install bacpytes
```

2. Current versions of VOLTTRON support only BACPytes version 0.16.7

## Agent Configuration

```
{
    "device_address": "10.0.2.15",
    "max_apdu_length": 1024,
    "object_id": 599,
    "object_name": "Volttron BACnet driver",
    "vendor_id": 15,
    "segmentation_supported": "segmentedBoth"
}
```

1. `device_address` - Address bound to the network port over which BACnet communication will happen on the computer running VOLTTRON. This is NOT the address of any target device.
2. `object_id` - ID of the Device object of the virtual BACnet device. Defaults to 599. Only needs to be changed if there is a conflicting BACnet device ID on your network.
3. `max_apdu_length` - Maximum size message the device can handle
4. `object_name` - Name of the object. Defaults to “Volttron BACnet driver”. (Optional)
5. `vendor_id` - Vendor ID of the virtual BACnet device. Defaults to 15. (Optional)
6. `segmentation_supported` - Segmentation allows larger messages to be broken up into segments and spliced back together. Possible setting are “segmentedBoth” (default), “segmentedTransmit”, “segmentedReceive”, or “noSegmentation” (Optional)

## 2.36 DataMover

### 2.36.1 datamover package

#### datamover.agent module

```
class datamover.agent.DataMover(destination_vip, destination_serverkey, destination_historian_identity='platform.historian', mote_identity=None, **kwargs)
```

Bases: `volttron.platform.agent.base_historian.BaseHistorian`

This historian forwards data to another platform.

**capture\_data** (*peer*, *sender*, *bus*, *topic*, *headers*, *message*)

**configure** (*configuration*)

Optional, may be implemented by a concrete implementation to add support for the configuration store. Values should be stored in this function only.

The process thread is stopped before this is called if it is running. It is started afterwards.



*historian\_setup* is called after this is called.

**historian\_setup()**

Optional setup routine, run in the processing thread before main processing loop starts. Gives the Historian a chance to setup connections in the publishing thread.

**historian\_teardown()**

Optional teardown routine, run in the processing thread if the main processing loop is stopped. This happened whenever a new configuration arrives from the config store.

**publish\_to\_historian(to\_publish\_list)**

Main publishing method for historian Agents.

**Parameters to\_publish\_list** (*list*) – List of records

*to\_publish\_list* takes the following form:

```
[
  {
    'timestamp': timestamp1.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/thermostat",
    'value': 73.0,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  {
    'timestamp': timestamp2.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/temperature",
    'value': 74.1,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  ...
]
```

The contents of *meta* is not consistent. The keys in the meta data values can be different and can change along with the values of the meta data. It is safe to assume that the most recent value of the “meta” dictionary are the only values that are relevant. This is the way the cache treats meta data.

Once one or more records are published either `BaseHistorianAgent.report_all_handled()` or `BaseHistorianAgent.report_handled()` must be called to report records as being published.

**timestamp()**

`datamover.agent.historian(config_path, **kwargs)`

`datamover.agent.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', '._', '_build/latex'])`

### 2.36.2 DataMover Historian

The DataMover Historian is used to send data from one instance of VOLTTRON to another. This agent is similar to the Forward Historian but does not publish data on the target platform's message bus. Messages are instead inserted into the backup queue in the target's historian. This helps to ensure that messages are recorded.

If the target instance becomes unavailable or the target historian is stopped then this agent's cache will build up until it reaches it's maximum capacity or the instance and agent comes back online.

The DataMover now uses the configuration store for storing its configurations. This allows dynamic updating of configuration without having to rebuild the agent.

#### Configuration Options

The following JSON configuration file shows all the options currently supported by the DataMover agent.

```
{
  # destination-serverkey
  #   The destination instance's publickey. Required if the
  #   destination-vip-address has not been added to the known-host file.
  #   See vctl auth --help for all instance security options.
  #
  #   This can be retrieved either through the command:
  #       vctl auth serverkey
  #   Or if the web is enabled on the destination through the browser at:
  #       http(s)://hostaddress:port/discovery/
  "destination-serverkey": null,

  # destination-vip-address - REQUIRED
  #   Address of the target platform.
  #   Examples:
  #       "destination-vip": "ipc://@/home/volttron/.volttron/run/vip.socket"
  #       "destination-vip": "tcp://127.0.0.1:23916"
  "destination-vip": "tcp://<ip address>:<port>",

  # destination_historian_identity
  #   Identity of the historian to send data to. Only needed if data
  #   should be sent an agent other than "platform.historian"
  "destination-historian-identity": "platform.historian",

  # remote_identity - OPTIONAL
  #   identity that will show up in peers list on the remote platform
  #   By default this identity is randomly generated
  "remote-identity": "22916.datamover"
}
```

## 2.37 ForwardHistorian

### 2.37.1 forwarder package

#### forwarder.agent module

```
class forwarder.agent.ForwardHistorian(destination_vip, destination_serverkey, custom_topic_list=[], topic_replace_list=[], required_target_agents=[], cache_only=False, destination_address=None, **kwargs)
```

Bases: `volttron.platform.agent.base_historian.BaseHistorian`

This historian forwards data to another instance as if it was published originally to the second instance.

**capture\_data** (*peer, sender, bus, topic, headers, message*)

**configure** (*configuration*)

Optional, may be implemented by a concrete implementation to add support for the configuration store. Values should be stored in this function only.

The process thread is stopped before this is called if it is running. It is started afterwards.

*historian\_setup* is called after this is called.

**historian\_setup** ()

Optional setup routine, run in the processing thread before main processing loop starts. Gives the Historian a chance to setup connections in the publishing thread.

**historian\_teardown** ()

Optional teardown routine, run in the processing thread if the main processing loop is stopped. This happened whenever a new configuration arrives from the config store.

**publish\_to\_historian** (*to\_publish\_list*)

Main publishing method for historian Agents.

**Parameters** *to\_publish\_list* (*list*) – List of records

*to\_publish\_list* takes the following form:

```
[
  {
    'timestamp': timestamp1.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/thermostat",
    'value': 73.0,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  {
    'timestamp': timestamp2.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/temperature",
    'value': 74.1,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  ...
]
```

The contents of *meta* is not consistent. The keys in the meta data values can be different and can change along with the values of the meta data. It is safe to assume that the most recent value of the “meta” dictionary are the only values that are relevant. This is the way the cache treats meta data.

Once one or more records are published either `BaseHistorianAgent.report_all_handled()` or `BaseHistorianAgent.report_handled()` must be called to report records as being published.

`timestamp()`

`forwarder.agent.historian(config_path, **kwargs)`

`forwarder.agent.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', ':', '_build/latex'])`

Main method called by the aip.

## 2.37.2 Forward Historian

The Forward Historian is used to send data from one instance of VOLTTRON to another. This agent's primary purpose is to allow the target instance's pubsub bus to simulate data coming from a real device. If the target instance becomes unavailable or one of the "required agents" becomes unavailable then the cache of this agent will build up until it reaches its maximum capacity or the instance and agents come back online.

The Forward Historian now uses the configuration store for storing its configurations. This allows dynamic updating of configuration without having to rebuild the agent.

### FAQ /Notes

By default the Forward Historian adds an X-Forwarded and X-Forwarded-From header to the forwarded message. The X-Forwarded-From uses the instance-name of the platform (ip address:port by default).

### Configuration Options

The following JSON configuration file shows all the options currently supported by the ForwardHistorian agent.

```
{
  # destination-serverkey
  #   The destination instance's publickey. Required if the
  #   destination-vip-address has not been added to the known-host file.
  #   See vctl auth --help for all instance security options.
  #
  #   This can be retrieved either through the command:
  #       vctl auth serverkey
  #   Or if the web is enabled on the destination through the browser at:
  #       http(s)://hostaddress:port/discovery/
  "destination-serverkey": null,

  # destination-vip-address - REQUIRED
  #   Address of the target platform.
  #   Examples:
  #       "destination-vip": "ipc://@/home/volttron/.volttron/run/vip.socket"
  #       "destination-vip": "tcp://127.0.0.1:22916"
  "destination-vip": "tcp://<ip address>:<port>"

  # required_target_agents
  #   Allows checking on the remote instance to verify peer identities
  #   are connected before publishing.
  #
```

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```

# Example:
#     Require the platform.historian agent to be present on the
#     destination instance before publishing.
#     "required_target_agent" ["platform.historian"]
"required_target_agents": [],

# capture_device_data
# This is True by default and allows the Forwarder to forward
# data published from the device topic
"capture_device_data": true,

# capture_analysis_data
# This is True by default and allows the Forwarder to forward
# data published from the device topic
"capture_analysis_data": true,

# capture_log_data
# This is True by default and allows the Forwarder to forward
# data published from the datalogger topic
"capture_log_data": true,

# capture_record_data
# This is True by default and allows the Forwarder to forward
# data published from the record topic
"capture_record_data": true,

# custom_topic_list
# Unlike other historians, the forward historian can re-publish from
# any topic. The custom_topic_list is prefixes to subscribe to on
# the local bus and forward to the destination instance.
"custom_topic_list": ["actuator", "alert"],

# cache_only
# Allows one to put the forward historian in a cache only mode so that
# data is backed up while doing operations on the destination
# instance.
# Setting this to true will start cache to backup and not attempt
# to publish to the destination instance.
"cache_only": false,

# topic_replace_list - Deprecated in favor of retrieving the list of
# replacements from the VCP on the current instance.
"topic_replace_list": [
    #{"from": "FromString", "to": "ToString"}
],

# Publish a message to the log after a certain number of "successful"
# publishes. To disable the message to not print anything set the
# count to 0.
# Note "successful" means that it was removed from the backup cache.
"message_publish_count": 10000
}

```

## 2.38 MQTTHistorian

### 2.38.1 mqtt\_historian package

#### mqtt\_historian.agent module

**class** mqtt\_historian.agent.**MQTTHistorian**(*connection*, *\*\*kwargs*)  
Bases: volttron.platform.agent.base\_historian.BaseHistorian

This historian publishes data to a MQTT Broker.

**publish\_to\_historian**(*to\_publish\_list*)  
Main publishing method for historian Agents.

**Parameters to\_publish\_list**(*list*) – List of records

*to\_publish\_list* takes the following form:

```
[
  {
    'timestamp': timestamp1.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/thermostat",
    'value': 73.0,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  {
    'timestamp': timestamp2.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isb1/hvac1/temperature",
    'value': 74.1,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  ...
]
```

The contents of *meta* is not consistent. The keys in the meta data values can be different and can change along with the values of the meta data. It is safe to assume that the most recent value of the “meta” dictionary are the only values that are relevant. This is the way the cache treats meta data.

Once one or more records are published either `BaseHistorianAgent.report_all_handled()` or `BaseHistorianAgent.report_handled()` must be called to report records as being published.

**timestamp**()

mqtt\_historian.agent.**historian**(*config\_path*, *\*\*kwargs*)

mqtt\_historian.agent.**main**(*argv*=['/home/docs/checkouts/readthedocs.org/user\_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/\_\_main\_\_.py', '-b', 'latex', '-D', 'language=en', '-d', '\_build/doctrees', '-', '\_build/latex'])

## 2.38.2 mqttlistener module

`mqttlistener.listen` (*client, userdata, message*)

## 2.38.3 MQTT Historian

### Overview

The MQTT Historian agent publishes data to an MQTT broker.

The `mqttlistener.py` script will connect to the broker and print all messages.

### Dependencies

The Paho MQTT library from Eclipse is needed for the agent and can be installed with:

```
pip install paho-mqtt
```

The Mosquitto MQTT broker may be useful for testing and can be installed with

```
apt-get install mosquitto
```

### Configuration

The following is an example configuration file:

```
{
  "connection": {
    # Optional backup limit in gigabytes. Default is no backup limit.
    # "backup_storage_limit_gb": null,

    # Quality of service level for MQTT publishes. Default is 0.
    # "mqtt_qos": 0,

    # Set messages to be retained. Default is False
    # "mqtt_retain": false,

    # Address of broker to connect to. Default is localhost.
    "mqtt_hostname": "localhost",

    # Port on broker accepting connections. Default is 1883
    "mqtt_port": 1883

    # If a client id is not provided one will be generated by paho-mqtt.
    # Default is an empty string.
    # "mqtt_client_id": "",

    # Keepalive timeout for the client. Default is 60 seconds
    # "mqtt_keepalive": 60,

    # Optional will is published when the client disconnects. Default is None.
    # If used then QOS defaults to 0 and retain defaults to False.
    # "mqtt_will": {
    #   "topic": "<topic>",
```

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```

#     "payload": "<payload>",
#     "qos": <qos>,
#     "retain": <retain>
# },

# MQTT authentication info. Defaults to None.
# "mqtt_auth": {
#     "username": "<username>",
#     "password": "<password>"
# },

# MQTT TLS parameters. If used then CA Certs is required. Otherwise the
# default is None.
# "mqtt_tls": {
#     "ca_certs": "<ca_certs>",
#     "certfile": "<certfile>",
#     "keyfile": "<keyfile>",
#     "tls_version": "<tls_version>",
#     "ciphers": "<ciphers>"
# }

# Protocol versions MQTTv311 and MQTTv31 are supported. Default is MQTTv311.
# "mqtt_protocol": "MQTTv311"
}

```

## 2.39 MongodbTaggingService

### 2.39.1 mongotagging package

#### mongotagging.tagging module

**class** `mongotagging.tagging.MongodbTaggingService` (*connection*, *table\_prefix=None*, *\*\*kwargs*)

Bases: `volttron.platform.agent.base_tagging.BaseTaggingService`

This is a tagging service agent that writes data to a Mongo database. For instance with large amount of tags and frequent tag queries, a NOSQL database such as Mongodb would provide better efficiency than SQLite.

**insert\_topic\_tags** (*tags*, *update\_version=False*)

Add tags to multiple topics.

#### Parameters

- **tags** (*dict*) – dictionary object or file containing the topic and the tag details. dictionary object or the file content should be of the format:

```
<topic_name or prefix or topic_name pattern>: {<valid
tag>:<value>, ... }, ... }
```

- **update\_version** (*bool*) – True/False. Default to False. If set to True and if any of the tags update an existing tag value the older value would be preserved as part of tag version history. Note: this feature is not implemented in the current version of sqlite and mongodb tagging service.



**load\_tag\_refs()**

Called right after setup to load a dictionary of reference tags and its corresponding parent tag. Implementing methods should load self.tag\_refs with tag and parent tag information

**load\_valid\_tags()**

Called right after setup to load a dictionary of valid tags. It should load self.valid\_tags with tag and type information

**query\_categories** (*include\_description=False, skip=0, count=None, order='FIRST\_TO\_LAST'*)

Get the available list tag categories. category can have multiple tags and tags could belong to multiple categories

**Parameters**

- **include\_description** (*bool*) – indicate if result should include available description for categories returned
- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns** list of category names if include\_description is False, list of (category name, description) if include\_description is True

**Return type** *list*

**query\_tags\_by\_category** (*category, include\_kind=False, include\_description=False, skip=0, count=None, order='FIRST\_TO\_LAST'*)

Get the list of tags for a given category name. category can have multiple tags and tags could belong to multiple categories

**Parameters**

- **category** (*str*) – name of the category for which associated tags should be returned
- **include\_kind** (*bool*) – indicate if result should include the kind/datatype for tags returned
- **include\_description** (*bool*) – indicate if result should include available description for tags returned
- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns**

Will return one of the following

- list of tag names
- list of (tags, its data type/kind) if include\_kind is True
- list of (tags, description) if include\_description is True
- list of (tags, its data type/kind, description) if include\_kind is True and include\_description is true

**Return type** *list*

**query\_tags\_by\_topic** (*topic\_prefix, include\_kind=False, include\_description=False, skip=0, count=None, order='FIRST\_TO\_LAST'*)

Get the list of tags for a given topic prefix or name.

### Parameters

- **topic\_prefix** (*str*) – topic\_prefix for which associated tags should be returned
- **include\_kind** (*bool*) – indicate if result should include the kind/datatype for tags returned
- **include\_description** (*bool*) – indicate if result should include available description for tags returned
- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

### Returns

Will return one of the following

- list of (tag name, value)
- list of (tag name, value, data type/kind) if include\_kind is True
- list of (tag name, value, description) if include\_description is True
- list of (tags, value, data type/kind, description) if include\_kind is True and include\_description is true

### Return type `list`

**query\_topics\_by\_tags** (*ast*, *skip=0*, *count=None*, *order=None*)

Get list of topic names and topic name prefixes based on query condition. Query condition is passed as an abstract syntax tree.

### Parameters

- **ast** (*tuple*) – Abstract syntax tree that represents conditional statement to be used for matching tags. The abstract syntax tree represents query condition that is created using the following specification

Query condition is a boolean expression that contains one or more query conditions combined together with an “AND” or “OR”. Query conditions can be grouped together using parenthesis. Each condition in the expression should conform to one of the following format:

1. <tag name/ parent.tag\_name> <binary\_operator> <value>
2. <tag name/ parent.tag\_name>
3. <tag name/ parent.tag\_name> LIKE <regular expression within single quotes>
4. the word NOT can be prefixed before any of the above three to negate the condition.
5. expressions can be grouped with parenthesis. For example

```
condition="(tag1 = 1 or tag1 = 2) and (tag2 < ' and tag2 >
') and tag3 and (tag4 LIKE '^a.*b$') "
condition="NOT (tag5='US' OR tag5='UK') AND NOT tag3 AND
NOT (tag4 LIKE 'a.*') "
condition="campusRef.geoPostalCode='20500' and equip and
boiler"
```

- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return

- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns** list of topics/topic\_prefix that match the given query conditions

**Return type** *list*

**setup()**

Called on start of agent Method to establish database connection, do any initial bootstrap necessary. Example - load master list of tags, units, categories etc. into data store/memory

```
mongotagging.tagging.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', '.', '_build/latex'])
```

Main entry point for the agent.

**Parameters** *argv* –

**Returns**

```
mongotagging.tagging.tagging_service(config_path, **kwargs)
```

This method is called by the `tagging.main()` to parse the passed config file or configuration dictionary object, validate the configuration entries, and create an instance of `MongodbTaggingService`

**Parameters**

- **config\_path** – could be a path to a configuration file or can be a dictionary object
- **kwargs** – additional keyword arguments if any

**Returns** an instance of `tagging.MongodbTaggingService`

## 2.39.2 Mongodb Tagging Service

Mongodb tagging service provide APIs to tag both topic names(device points) and topic name prefixes (campus, building, unit/equipment, sub unit) and then query for relevant topics based on saved tag names and values. This agent stores the tags in a mongodb database.

Tags used by this agent are not user defined. They have to be pre-defined in a resource file at `volttron_data/tagging_resources`. The agent validates against this predefined list of tags every time user add tags to topics. Tags can be added to one topic at a time or multiple topics by using a topic name pattern(regular expression). This agent uses tags from [project haystack](#), and adds a few custom tags for campus and VOLTTRON point name.

Each tag has an associated value and users can query for topic names based tags and its values using a simplified sql-like query string. Queries can specify tag names with values or tags without values for boolean tags(markers). Queries can combine multiple conditions with keyword AND and OR, and use the keyword NOT to negate a conditions.

## Requirements

This historian requires a mongodb connector installed in your activated volttron environment to talk to mongodb. Please execute the following from an activated shell in order to install it.

```
pip install pymongo
```

## Dependencies and Limitations

1. When adding tags to topics, this agent calls the platform.historian's `get_topic_list` and hence requires the platform.historian to be running but it doesn't require the historian to use any specific database. It does not require platform.historian to be running for using its query APIs.
2. Resource files that provides the list of valid tags is mandatory and should be in `volttron_data/tagging_reosources/tags.csv`
3. Tagging service only provides APIs query for topic names based on tags. Once the list of topic names is retrieved, users should use the historian APIs to get the data corresponding to those topics.
4. Current version of tagging service does not support versioning of tag/values. When tags values set using tagging service APIs update/overwrite any existing tag entries in the database

## Configuration Options

The following JSON configuration file shows all the options currently supported by this agent.

```
{
  "connection": {
    "type": "mongodb",
    "params": {
      "host": "localhost",
      "port": 27017,
      "database": "test_historian",
      "user": "username for this db. should have read write access",
      "passwd": "password for this db"
    }
  },
  # optional. Specify if collections created for tagging should have names
  # starting with a specific prefix <given prefix>_<collection_name>
  "table_prefix": "volttron",

  # optional. Specify if you want tagging service to query the historian
  # with this vip identity. defaults to platform.historian
  "historian_vip_identity": "mongo.historian"
}
```

## See Also

[TaggingServiceSpec](#)

## 2.40 OpenADRVenAgent

### 2.40.1 openadr\_ven package

`openadr_ven.agent` module

`openadr_ven.constants` module

**openadr\_ven.volttron\_openadr\_client module****2.40.2 OpenADRVen Agent**

This agent provides the ability to connect to an OpenADR Virtual Top Node (VTN) via an OpenADR Virtual End Node (VEN). OpenADR (Automated Demand Response) is a standard for alerting and responding to the need to adjust electric power consumption in response to fluctuations in grid demand.

**Requirements**

The OpenADRVen agent requires the openleadr package. This package can be installed in an activated environment with:

```
pip install openleadr
```

**VTN Server setup**

Depending on the type of VTN that you are using, you need to configure your VTN to send events so that the OpenADRVen agent can receive such events from your VTN.

**IPKeys VTN setup**

The community is currently testing this OpenADRVen agent against a IPKeys VTN. To configure the agent with the right certificates, follow the instructions below:

- Get VEN certificates at <https://testcerts.kyrio.com/#/>. Certificates can be stored anywhere on your machine, however, it is recommended to place your keypair files in your ~/.ssh/ folder and make those files read-only.
- Login to the IPKeys VTN web browser console at <https://eiss2demo.ipkeys.com/ui/home/#/login>
- To create an event, click “Events” tab. Then click the “+” icon to create an event. Use the template “PNNL-TestEvent” or “PNNLnonestevent” to create an event.

**Configuration**

The required parameters for this agent are “ven\_name”, “vtn\_url”, and “openadr\_client\_type”. Below is an example of a correct configuration with optional parameters added.

```
{
  "ven_name": "PNNLVEN",
  "vtn_url": "https://eiss2demo.ipkeys.com/oadr2/OpenADR2/Simple/2.0b",
  "openadr_client_type": "IPKeysClient" # the list of valid client types are the
↪class names of the OpenADRClient subclasses in ~openadr_ven/volttron_openadr_client.
↪py

  # below are optional configurations

  # if you want/need to sign outgoing messages using a public-private key pair,
↪provide the relative path to the cert_path and key_path
  # in this example, the keypair is stored in the directory named '~/.ssh/secret'
  "cert_path": "~/.ssh/secret/TEST_RSA_VEN_210923215148_cert.pem",
  "key_path": "~/.ssh/secret/TEST_RSA_VEN_210923215148_privkey.pem",
```

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```
# other optional configurations
"debug": true,
# if you are connecting to a legacy VTN (i.e. not conformant to OpenADR 2.0) you
→might want
# to disable signatures when creating messages to be sent to a legacy VTN.
"disable_signature": true
}
```

Save this configuration in a JSON file in your preferred location. An example of such a configuration is saved in the root of the OpenADRVenAgent directory; the file is named `config_example1.json`

## Installing the agent

- Start the Volttron platform on your machine.

```
volttron -vv -l volttron.log &
```

- Tail the logs so that you can observe the logs coming from the Volttron OpenADR VEN agent.

```
tail -f volttron.log
```

- Install the agent on Volttron in a secondary shell.

Open a secondary shell and run the following command:

```
vctl install <path to root directory of volttron-openadr-ven> \
--tag openadr \
--agent-config <path to agent config>
```

- Verify status of agent.

```
vctl status
```

- Start the agent.

```
vctl start --tag openadr
```

## Notes

The OpenADRVen agent uses a third-party library, [OpenLeader](#), as the actual client. However, the OpenADRVen agent had to modify some parts of that client in order to connect to the IPKeys VTN for testing. Specifically, OpenADRVen agent extends the `OpenLeadr` client class and overrides some class methods.

Those parts that were modified are located in `~/volttron_openadr_ven/volttron_openleadr.py`. Future releases of `OpenLeadr` could potentially and adversely affect OpenADRVen agent if those releases directly or indirectly affect the modified code blocks. Thus, maintenance of this agent should closely monitor future changes to `OpenLeadr`.

## 2.41 PlatformDriverAgent

### 2.41.1 platform\_driver package

#### Subpackages

#### platform\_driver.interfaces package

#### Driver Development

New drivers are implemented by subclassing *BaseInterface*.

While it is possible to create an Agent which handles communication with a new device it will miss out on the benefits of creating a proper interface for the Platform Driver Agent.

Creating an Interface for a device allows users of the device to automatically benefit from the following platform features:

- Existing Agents can interact with the device via the Actuator Agent without any code changes.
- **Configuration follows the standard form of other devices. Existing and future tools** for configuring devices on the platform will work with the new device driver.
- Historians will automatically capture data published by the new device driver.
- Device data can be graphed in VOLTRON Central in real time.
- **If the device can receive a heartbeat signal the driver framework can be configured to** automatically send a heartbeat signal.
- **When the configuration store feature is rolled out the device can be dynamically configured** through the platform.

#### Creating a New Interface

To create a new device driver create a new module in the `PlatformDriverAgent.platform_driver.interfaces` package. The name of this module will be the name to use in the “driver\_type” setting in a *driver configuration file* in order to load the new driver.

In the new module create a subclass of *BaseInterface* called *Interface*.

The *Interface* class must implement the following methods:

- *BaseInterface.configure()*
- *BaseInterface.set\_point()*
- *BaseInterface.get\_point()*
- *BaseInterface.scrape\_all()*

These methods are required but can be implemented using the *BasicRevert* mixin.

- *BaseInterface.revert\_point()*
- *BaseInterface.revert\_all()*

Each point on the device must be represented by an instance of the *BaseRegister*. Create one or more subclasses of *BaseRegister* as needed to represent the points on a device.

## Interface Configuration and Startup

When processing a *driver configuration file* the Platform Driver Agent will use the “driver\_type” setting to automatically find and load the appropriate `Interface` class for the desired driver.

After loading the class the Platform Driver Agent will call `BaseInterface.configure()` with the contents of the “driver\_config” section of the *driver configuration file* parsed into a python dictionary and the contents of the file referenced in “registry\_config” entry.

`BaseInterface.configure()` must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

After calling `BaseInterface.configure()` the Platform Driver Agent will use the created registers to create meta data for each point on the device.

## Device Scraping

The work scheduling and publish periodic device scrapes is handled by the Platform Driver Agent. When a scrape starts the Platform Driver Agent calls the `BaseInterface.scrape_all()`. It will take the results of the call and attach meta data and and publish as needed.

## Device Interaction

Requests to interact with the device via any method supported by the platform are routed to the correct `Interface` instance by the Platform Driver Agent.

Most commands originate from RPC calls to the `Actuator Agent` and are forwarded to the Platform Driver Agent.

- A command to set the value of a point on a device results in a call to `BaseInterface.set_point()`.
- A request for the current value of a point on a device results in a call to `BaseInterface.get_point()`.
- A request to revert a point on a device to its default state results in a call to `BaseInterface.revert_point()`.
- A request to revert an entire device to its default state results in a call to `BaseInterface.revert_all()`.

## Registers

The Platform Driver Agent uses the `BaseInterface.get_register_names()` and `BaseInterface.get_register_by_name()` methods to get registers to setup meta data.

This means that its a requirement to use the `BaseRegister` class to store information about points on a devices.



## Using the BasicRevert Mixin

If the device protocol has no support for reverting to a default state an *Interface* this functionality can be implemented with the *BasicRevert* mixin.

When using the *BasicRevert* mixin you must specify it first in the list of parent classes, otherwise it won't Python won't detect that the *BaseInterface.revert\_point()* and *BaseInterface.revert\_all()* have been implemented.

If desired the *BasicRevert.set\_default()* can be used by the *Interface* class to set values for each point to revert to.

```
class platform_driver.interfaces.BaseInterface (vip=None, core=None, **kwargs)
```

Bases: *object*

Main class for implementing support for new devices.

All interfaces *must* subclass this.

### Parameters

- **vip** – A reference to the PlatformDriverAgent vip subsystem.
- **core** – A reference to the parent driver agent's core subsystem.

```
build_register_map ()
```

```
abstract configure (config_dict, registry_config_str)
```

Configures the Interface for the specific instance of a device.

### Parameters

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of *BaseRegister* (or a subclass) and adding them to the Interface with *BaseInterface.insert\_register()*.

```
get_multiple_points (path, point_names, **kwargs)
```

Read multiple points from the interface.

### Parameters

- **path** (*str*) – Device path
- **point\_names** (*[str]*) – Names of points to retrieve
- **kwargs** (*dict*) – Any interface specific parameters

**Returns** Tuple of dictionaries to results and any errors

**Return type** (*dict, dict*)

```
abstract get_point (point_name, **kwargs)
```

Get the current value for the point name given.

### Parameters

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

**get\_register\_by\_name** (*name*)

Get a register by it's point name.

**Parameters** **name** (*str*) – Point name of register.

**Returns** An instance of BaseRegister

**Return type** *BaseRegister*

**get\_register\_names** ()

Get a list of register names. :return: List of names :rtype: list

**get\_register\_names\_view** ()

Get a dictview of register names. :return: Dictview of names :rtype: dictview

**get\_registers\_by\_type** (*reg\_type*, *read\_only*)

Get a list of registers by type. Useful for an *Interface* that needs to categorize registers by type when doing a scrape.

**Parameters**

- **reg\_type** (*str*) – Register type. Either “bit” or “byte”.
- **read\_only** (*bool*) – Specify if the desired registers are read only.

**Returns** An list of BaseRegister instances.

**Return type** *list*

**insert\_register** (*register*)

Inserts a register into the *Interface*.

**Parameters** **register** (*BaseRegister*) – Register to add to the interface.

**abstract revert\_all** (*\*\*kwargs*)

Revert entire device to it's default state

**Parameters** **kwargs** – Any interface specific parameters.

**abstract revert\_point** (*point\_name*, *\*\*kwargs*)

Revert point to it's default state.

**Parameters** **kwargs** – Any interface specific parameters.

**abstract scrape\_all** ()

Method the Platform Driver Agent calls to get the current state of a device for publication.

**Returns** Point names to values for device.

**Return type** *dict*

**set\_multiple\_points** (*path*, *point\_names\_values*, *\*\*kwargs*)

Set multiple points on the interface.

**Parameters**

- **path** (*str*) – Device path
- **point\_names\_values** – Point names and values to be set to.
- **kwargs** (*dict*) – Any interface specific parameters

**Returns** Dictionary of points to any exceptions raised

**Return type** *dict*

**abstract set\_point** (*point\_name*, *value*, *\*\*kwargs*)

Set the current value for the point name given.

Implementations of this method should make a reasonable effort to return the actual value the point was set to. Some protocols/devices make this difficult. (I'm looking at you BACnet) In these cases it is acceptable to return the value that was requested if no error occurs.

#### Parameters

- **point\_name** (*str*) – Name of the point to retrieve.
- **value** – Value to set the point to.
- **kwargs** – Any interface specific parameters.

**Returns** Actual point value set.

**class** platform\_driver.interfaces.**BaseRegister** (*register\_type*, *read\_only*, *pointName*, *units*, *description=""*)

Bases: `object`

Class for containing information about a point on a device. Should be extended to support the device protocol to be supported.

The member variable `python_type` should be overridden with the equivalent python type object. Defaults to `int`. This is used to generate meta data.

#### Parameters

- **register\_type** (*str*) – Type of the register. Either “bit” or “byte”. Usually “byte”.
- **read\_only** (*bool*) – Specify if the point can be written to.
- **pointName** (*str*) – Name of the register.
- **units** (*str*) – Units of the value of the register.
- **description** (*str*) – Description of the register.

The Platform Driver Agent will use `BaseRegister.get_units()` to populate metadata for publishing. When instantiating register instances be sure to provide a useful string for the units argument.

**get\_description()**

**Returns** Register description

**Return type** `str`

**get\_register\_python\_type()**

**Returns** The python type of the register.

**Return type** `type`

**get\_register\_type()**

**Returns** (`register_type`, `read_only`)

**Return type** `tuple`

**get\_units()**

**Returns** Register units

**Return type** `str`

```
class platform_driver.interfaces.BasicRevert (**kwargs)
```

Bases: `object`

A mixin that implements the `BaseInterface.revert_all()` and `BaseInterface.revert_point()` methods on an Interface.

It works by tracking change to all writable points until a `set_point` call is made. When this happens the point is marked dirty and the previous value is remembered. When a point is reverted via either a `revert_all` or `revert_point` call the dirty values are set back to the clean value using the `BasicRevert._set_point()` method.

As it must hook into the setting and scraping of points it implements the `BaseInterface.scrape_all()` and `BaseInterface.set_point()` methods. It then adds `BasicRevert._set_point()` and `BasicRevert._scrape_all()` to the abstract interface. An existing interface that wants to use this class can simply mix it in and rename it's `set_point` and `scrape_all` methods to `_set_point` and `_scrape_all` respectively.

An `BaseInterface` may also override the detected clean value with its own value to revert to by calling `BasicRevert.set_default()`. While default values can be set anytime they should be set in the `BaseInterface.configure()` call.

```
revert_all (**kwargs)
```

Implementation of `BaseInterface.revert_all()`

Calls `BasicRevert._set_point()` with `point_name` and the value to revert the point to for every writable point on a device.

Currently `**kwargs` is ignored.

```
revert_point (point_name, **kwargs)
```

Implementation of `BaseInterface.revert_point()`

Revert point to its default state.

Calls `BasicRevert._set_point()` with `point_name` and the value to revert the point to.

**Parameters** `point_name` (`str`) – Name of the point to revert.

Currently `**kwargs` is ignored.

```
scrape_all ()
```

Implementation of `BaseInterface.scrape_all()`

```
set_default (point, value)
```

Set the value to revert a point to.

**Parameters**

- **point** (`str`) – name of point to set.
- **value** – value to set the point to.

```
set_point (point_name, value)
```

Implementation of `BaseInterface.set_point()`

Passes arguments through to `BasicRevert._set_point()`

```
exception platform_driver.interfaces.DriverInterfaceError
```

Bases: `Exception`

```
class platform_driver.interfaces.RevertTracker
```

Bases: `object`

A helper class for tracking the state of writable points on a device.

**clear\_dirty\_point** (*point*)

Clears the dirty flag on a point.

**Parameters** **point** (*str*) – Name of dirty point flag to clear.

**get\_all\_revert\_values** ()

Returns a dict of points to revert values.

If no default is set use the clean value, otherwise returns the default value.

If no default value is set and a no clean values have been submitted a point value will be an instance of *DriverInterfaceError*.

**Parameters** **point** (*str*) – Name of point to get.

**Returns** Values to revert to.

**Return type** *dict*

**get\_revert\_value** (*point*)

Returns the clean value for a point if no default is set, otherwise returns the default value.

If no default value is set and a no clean values have been submitted raises *DriverInterfaceError*.

**Parameters** **point** (*str*) – Name of point to get.

**Returns** Value to revert to.

**mark\_dirty\_point** (*point*)

Sets the dirty flag on a point.

Ignores points with a default value.

**Parameters** **point** (*str*) – Name of point flag to dirty.

**set\_default** (*point, value*)

Set the value to revert a point to. Overrides any clean value detected.

**Parameters**

- **point** (*str*) – name of point to set.
- **value** – value to set the point to.

**update\_clean\_values** (*points*)

Update all state of all the clean point values for a device.

If a point is marked dirty it will not be updated.

**Parameters** **points** (*dict*) – dict of point names to values.

## Subpackages

**platform\_driver.interfaces.chargepoint package**

```
class platform_driver.interfaces.chargepoint.AlarmRegister (read_only,  
                                                         point_name,      at-  
                                                         tribute_name,  units,  
                                                         data_type,    station_id,  
                                                         default_value=None,  
                                                         description=","  
                                                         port_number=None,  
                                                         username=None,  
                                                         timeout=0)
```

Bases: `platform_driver.interfaces.chargepoint.ChargepointRegister`

Register designated for all attributes returned from the Chargepoint API getAlarms call.

Input parameters are the same as parent ChargepointRegister class.

Readable attributes: alarmType and alarmTime: Return the most recent alarm registered for the given station. If a port is defined for the register, only alarms ascribed to the port will be returned. If value is None, then there are no active alarms describing the station and/or port (depending on config).

Writeable attributes:

clearAlarms: Only accepts a write-value of 1 or True. This indicates that the Chargepoint station should be cleared of any alarms. If a point is defined for the register, only alarms ascribed to the port will be cleared. This value, when read, will always return None, as it does not exist as a returnable Chargepoint attribute.

```
attribute_list = ['alarmType', 'alarmTime', 'clearAlarms']
```

**property value**

```
writeable_list = ['clearAlarms']
```

```
class platform_driver.interfaces.chargepoint.ChargepointRegister (read_only,  
                                                         point_name,  
                                                         at-  
                                                         tribute_name,  
                                                         units,  
                                                         data_type,  
                                                         sta-  
                                                         tion_id,  de-  
                                                         fault_value=None,  
                                                         descrip-  
                                                         tion=","  
                                                         port_number=None,  
                                                         user-  
                                                         name=None,  
                                                         timeout=0)
```

Bases: `platform_driver.interfaces.BaseRegister`

Base class for any Chargepoint related register

Defines init-level operations for all Chargepoint registers. Also requires abstract get and set methods for value property.

**Parameters**

- **read\_only** – True = Read-only, False = Read/Write.
- **point\_name** – Volttron-given name of point.

- **attribute\_name** – Name used in Chargepoint API call. Needs to syntactically match any value in class

'attribute\_list' variables. :param units: Required by parent class. Not used by Chargepoint. :param data\_type: Python type of register. Used to cast API call results. :param station\_id: ID of Chargepoint Station register describes. :param default\_value: Default value of register. :param description: Basic description of register. :param port\_number: (Optional) Port number of Chargepoint Station register describes. Some registers describe port level granularity while others describe the Chargepoint Station as a whole. :param username: Username for Chargepoint API login

**get\_register** (*result, method, port\_flag=True*)

Gets correct register from API response.

#### Parameters

- **result** – API result from which to grab register value.
- **method** – Name of Chargepoint API call that was made.
- **port\_flag** – Flag indicating whether or not Port-level parameters can be used. GetAlarms and

GetChargingSessionData methods use ports in their queries, but have a different reply structure than other API method calls.

**Returns** Correct register value cast to appropriate python type. Returns None if there is an error.

**read\_only\_check** ()

**static sanitize\_output** (*data\_type, value*)

**abstract value** (*x*)

```
class platform_driver.interfaces.chargepoint.ChargingSessionRegister (read_only,
                                                                    point_name,
                                                                    at-
                                                                    tribute_name,
                                                                    units,
                                                                    data_type,
                                                                    sta-
                                                                    tion_id,
                                                                    de-
                                                                    fault_value=None,
                                                                    de-
                                                                    scrip-
                                                                    tion="",
                                                                    port_number=None,
                                                                    user-
                                                                    name=None,
                                                                    time-
                                                                    out=0)
```

Bases: *platform\_driver.interfaces.chargepoint.ChargepointRegister*

Register designated for all attributes returned from the Chargepoint API getChargingSessions call.

Input parameters are the same as parent ChargepointRegister class. No attribute in this register is writeable.

**attribute\_list** = ['sessionID', 'startTime', 'endTime', 'Energy', 'rfidSerialNumber', '...

**property value**

**writeable\_list** = []

```
class platform_driver.interfaces.chargepoint.Interface (**kwargs)
    Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.
            BaseInterface

    configure (config_dict, registry_config_str)
        Configure interface for driver.

        References global CPService object and configures with username and password if not already configured.

        Parameters

        • config_dict – Input from driver config.

        • registry_config_str – Input from csv file.

    get_point (point_name)
        Get the current value for the point name given.

        Parameters

        • point_name (str) – Name of the point to retrieve.

        • kwargs – Any interface specific parameters.

        Returns Point value

    parse_config (config_dict, registry_config_str)
        Main method to parse the CSV registry config file.

class platform_driver.interfaces.chargepoint.LoadRegister (read_only, point_name,
                                                            attribute_name, units,
                                                            data_type, station_id,
                                                            default_value=None,
                                                            description="",
                                                            port_number=None,
                                                            username=None,
                                                            timeout=0)

    Bases: platform_driver.interfaces.chargepoint.ChargepointRegister

    Register designated for all attributes returned from the Chargepoint API getLoad call.

    Input parameters are the same as parent ChargepointRegister class.

    Writeable attributes (Note, if either allowedLoad or percentShed are set, the other will be set to None. In
    addition, shedState will be set to 1 or True):

    allowedLoad: Amount of load to shed in an absolute value. Limits charging to x kW. percentShed: Percent of
    load to shed. Limits charging to x% of load. shedState: Only accepts a write-value of 0 or False. This indicates
    that the Chargepoint station should be cleared of any load shed constraints

    attribute_list = ['portLoad', 'allowedLoad', 'percentShed', 'shedState']

    property value

    writable_list = ['allowedLoad', 'percentShed', 'shedState']
```



```
class platform_driver.interfaces.chargepoint.StationRegister (read_only,
                                                         point_name,
                                                         attribute_name,
                                                         units, data_type,
                                                         station_id, de-
                                                         fault_value=None,
                                                         description="",
                                                         port_number=None,
                                                         username=None,
                                                         timeout=0)
```

Bases: `platform_driver.interfaces.chargepoint.ChargepointRegister`

Register designated for all attributes returned from the Chargepoint API getStations call.

Input parameters are the same as parent ChargepointRegister class. No attribute in this register is writeable.

```
attribute_list = ['stationID', 'stationManufacturer', 'stationModel', 'portNumber', 's',
                  'property value']
writeable_list = []
```

```
class platform_driver.interfaces.chargepoint.StationRightsRegister (read_only,
                                                                    point_name,
                                                                    at-
                                                                    tribute_name,
                                                                    units,
                                                                    data_type,
                                                                    station_id,
                                                                    de-
                                                                    fault_value=None,
                                                                    descrip-
                                                                    tion="",
                                                                    port_number=None,
                                                                    user-
                                                                    name=None,
                                                                    time-
                                                                    out=0)
```

Bases: `platform_driver.interfaces.chargepoint.ChargepointRegister`

Register designated for all attributes returned from the Chargepoint API getStationRights call.

Input parameters are the same as parent ChargepointRegister class. No attribute in this register is writeable.

Unlike any other ChargepointRegister subclasses, the stationRightsProfile is of type ‘dictionary.’ This calls the global method recursive\_asdict, which takes the returned SUDS object and converts it, recursively, into a python dictionary. As such, this register does not go through the parent class get\_register method to return its value.

```
attribute_list = ['stationRightsProfile']
property value
writeable_list = []
```

```
class platform_driver.interfaces.chargepoint.StationStatusRegister(read_only,  
                                                                point_name,  
                                                                at-  
                                                                tribute_name,  
                                                                units,  
                                                                data_type,  
                                                                station_id,  
                                                                de-  
                                                                fault_value=None,  
                                                                descrip-  
                                                                tion="",  
                                                                port_number=None,  
                                                                user-  
                                                                name=None,  
                                                                time-  
                                                                out=0)
```

Bases: `platform_driver.interfaces.chargepoint.ChargepointRegister`

Register designated for all attributes returned from the Chargepoint API `getStationStatus` call.

Input parameters are the same as parent `ChargepointRegister` class. No attribute in this register is writeable.

```
attribute_list = ['Status', 'TimeStamp']
```

```
property value
```

```
writeable_list = []
```

```
platform_driver.interfaces.chargepoint.recursive_asdict(d)
```

Convert Suds object into serializable format.

Credit goes to user plaes as found here: <http://stackoverflow.com/questions/2412486/serializing-a-suds-object-in-python>

### `platform_driver.interfaces.chargepoint.async_service` module

This module is used to process asynchronous requests and cache results for later use. It was written to handle Web API calls to the Chargepoint service but could be used for any long-ish running, gevent friendly function calls.

A single queue is managed by the `web_service()` function. Requests are placed on the queue by client code, usually with a call to `CPRequest.request()`. The `web_service()` function records the request in a dictionary using the method signature (name + parameters). This dictionary maintains a set of `AsyncResult` objects, one for each request with the same signature.

After recording the request in the dictionary, the `web_service()` executes the request method in a short-lived greenlet (`web_call()`). The response is placed on the queue. When the `web_service()` encounters a response, it sets the values of all the `AsyncResults` waiting on that request, causing the client greenlets to ‘wake-up’ on an `AsyncResult.wait()`.

The request and response is left in the dictionary until a configurable expiration time so that subsequent requests with the same signature can use the cached result if it has not expired. In this case, the `AsyncResult` is set immediately.

```
class platform_driver.interfaces.chargepoint.async_service.CPRequest(method,  
                                                                time-  
                                                                out,  
                                                                *args,  
                                                                **kwargs)
```

Bases: `object`

Encapsulates a method to be called asynchronously.

The result is returned as `AsyncResult`. The `request()` classmethod is used to create a request, queue it to the `web_service()` and return an `AsyncResult` that the caller can wait() on.

**is\_request()**

**key()**

**classmethod request** (*method, timeout, \*args, \*\*kwargs*)

Generate a new request and put it on the web service queue.

Returns the requests `AsyncResult` instance which will be filled in after the request has been executed.

**result()**

**property timeout**

```
class platform_driver.interfaces.chargepoint.async_service.CResponse (key,
                                                                    re-
                                                                    sponse,
                                                                    client)
```

Bases: `object`

A response to a `CRequest` invocation.

**property client**

**is\_request()**

**key()**

**response()**

```
class platform_driver.interfaces.chargepoint.async_service.CacheItem (cache_life)
Bases: object
```

A cached request/response.

As responses come in, they are matched to the originating request and `waiting_results` are 'set'. Subsequent requests with the same signature (`key`) are satisfied immediately, if not expired, by setting the `async` result on the incoming request.

**property expiration**

**property request**

**property response**

**property waiting\_results**

```
platform_driver.interfaces.chargepoint.async_service.web_call (request, client)
Wraps the request to be executed.
```

This is spawned as a greenlet and puts the request result on the queue.

```
platform_driver.interfaces.chargepoint.async_service.web_service()
Cache/service request loop.
```

**Reads items from the `web_service_queue`. It is intended to be spawned as a greenlet** that runs forever.

If the de-queued item is a `CRequest`, the cache is checked for an existing response. If not found, the request is added to cache and a greenlet is spawned to complete the request.

If the de-queued item is a `CResponse`, the item is found in cache and all waiting `AsyncResults` are set with the response. The response will stay in cache until expiration.

**platform\_driver.interfaces.chargepoint.credential\_check module****platform\_driver.interfaces.chargepoint.service module**

**exception** platform\_driver.interfaces.chargepoint.service.**CPAPIException** (*response\_code*,  
*re-*  
*sponse\_text*)

Bases: `Exception`

Generic Chargepoint API Exception.

**Parameters**

- **response\_code** – Exception code.
- **response\_text** – Exception description.

**class** platform\_driver.interfaces.chargepoint.service.**CPAPIGetAlarmsResponse** (*response*)  
Bases: `platform_driver.interfaces.chargepoint.service.CPAPIResponse`

**alarmTime** (*port=None*)

**alarmType** (*port=None*)

**property alarms**

**clearAlarms** (*port=None*)

**class** platform\_driver.interfaces.chargepoint.service.**CPAPIGetChargingSessionsResponse** (*response*)  
Bases: `platform_driver.interfaces.chargepoint.service.CPAPIResponse`

**Energy** (*port=None*)

**property charging\_sessions**

**driverAccountNumber** (*port=None*)

**driverName** (*port=None*)

**endTime** (*port=None*)

**rfidSerialNumber** (*port=None*)

**sessionID** (*port=None*)

**startTime** (*port=None*)

**class** platform\_driver.interfaces.chargepoint.service.**CPAPIGetLoadResponse** (*response*)  
Bases: `platform_driver.interfaces.chargepoint.service.CPAPIResponse`

**allowedLoad** (*port=None*)

**percentShed** (*port=None*)

**portLoad** (*port=None*)

**shedState** (*port=None*)

**stationLoad** (*port=None*)

**property station\_data**

**class** platform\_driver.interfaces.chargepoint.service.**CPAPIGetStationRightsResponse** (*response*)  
Bases: `platform_driver.interfaces.chargepoint.service.CPAPIResponse`

**property rights**

```

class platform_driver.interfaces.chargepoint.service.CPAPIGetStationStatusResponse (response)
    Bases: platform_driver.interfaces.chargepoint.service.CPAPIResponse

    Status (port=None)

    TimeStamp (port=None)

    property status

class platform_driver.interfaces.chargepoint.service.CPAPIGetStationsResponse (response)
    Bases: platform_driver.interfaces.chargepoint.service.CPAPIResponse

    Address (port=None)

    City (port=None)

    Connector (port=None)

    Country (port=None)

    Current (port=None)

    Description (port=None)

    Lat (port=None)

    Level (port=None)

    Long (port=None)

    Mode (port=None)

    Power (port=None)

    Reservable (port=None)

    State (port=None)

    Type (port=None)

    Voltage (port=None)

    currencyCode (port=None)

    endTime (port=None)

    mainPhone (port=None)

    maxPrice (port=None)

    minPrice (port=None)

    numPorts (port=None)

    orgID (port=None)

    organizationName (port=None)

    portNumber (port=None)

    postalCode (port=None)

    static pricing_helper (attribute, station)

    sessionTime (port=None)

    sgID (port=None)

    sgName (port=None)

    startTime (port=None)

```

```
stationID (port=None)
stationMacAddr (port=None)
stationManufacturer (port=None)
stationModel (port=None)
stationName (port=None)
stationSerialNum (port=None)
property stations
unitPriceForFirst (port=None)
unitPricePerHour (port=None)
unitPricePerHourThereafter (port=None)
unitPricePerKWh (port=None)
unitPricePerSession (port=None)
class platform_driver.interfaces.chargepoint.service.CPAPIResponse (response)
    Bases: object
    Response object describing a chargepoint API call
        Parameters response – SOAP object containing the API response
        Property responseCode API response Code. ‘100’ is a successful call.
        Property responseText Short description of the designation for the API call
        Method is_successful Returns Boolean value checking whether or not responseCode is set to ‘100.’
    static check_output (attribute, parent_dict)
        Helper method for get_port_value
    static get_attr_from_response (name_string, response, portNum=None)
    static get_port_value (port_number, data, attribute)
        Returns data for a given port
        Parameters
            • port_number – Number of the port to access.
            • data – Larger data structure to scan for Port data.
            • attribute – Which piece of Port data to return.
        Return port_data Accessed data for given port number and attribute. Else None.
    static is_not_found (name)
    is_successful ()
    property responseCode
    property responseText
class platform_driver.interfaces.chargepoint.service.CPGroupManager (cps,
                                                                    group,
                                                                    sta-
                                                                    tions)
    Bases: object
    Manger for a Chargepoint group and its stations.
```

**Parameters**

- **cps** – Chargepoint Service object.
- **group** – CPStationGroup object.
- **stations** – List of CPStation objects belonging to the CPStationGroup.

**refreshGroupStationData()**

For all stations belonging to group, refresh load data.

```
class platform_driver.interfaces.chargepoint.service.CPOrganization(cpn_id,
                                                                    orga-
                                                                    niza-
                                                                    tion_id,
                                                                    name='Unknown')
```

Bases: `object`

Represents an organization within the ChargePoint network.

**Parameters**

- **cpn\_id** – Chargepoint Network ID.
- **organization\_id** – Chargepoint Org ID.
- **name** –

**orgID()**

Returns Chargepoint orgID

**Return orgID** 'cpn\_id:organization\_id'.

```
class platform_driver.interfaces.chargepoint.service.CPPort(data=None)
```

Bases: `object`

**property connector**

**property current**

**property level**

**property portNumber**

**property power**

**property voltage**

```
class platform_driver.interfaces.chargepoint.service.CPService(username=None,
                                                                pass-
                                                                word=None)
```

Bases: `object`

Python wrapper around the Chargepoint WebServices API.

Current Version: 5.0 Docs: ChargePoint\_Web\_Services\_API\_Guide\_Ver4.1\_Rev5.pdf

**clearAlarms(\*\*kwargs)**

Clears the Alarms of given group or station based on given query parameters.

**Parameters **\*\*kwargs**** – any top-level kwarg in the following query. Most frequently queried via stationID.

**Query:**

```
(clearAlarmsSearchQuery){ orgID = None organizationName = None stationID = None station-
Name = None sgID = None sgName = None startTime = None endTime = None portNumber =
None alarmType = None clearReason = None
}
```

:returns SOAP reply object. If successful, there will be a responseCode of '100'.

**clearShedState** (\*\*kwargs)

Clears the shed state of given group or station.

**Parameters**

- **(as kwarg)** (*stationID*) – groupID of stations to clear.
- **(as kwarg)** – (Optional) ID of individual station to clear. If this is used, only that station will have

a cleared shed state, even with the use of sgID.

:returns SOAP reply object. If successful, there will be a responseCode of '100'.

**dump\_methods\_and\_datatypes** ()

Debugging tool. Prints out the SOAP methods and datatypes.

**getAlarms** (\*\*kwargs)

Returns any active alarms matching the search query.

**Parameters** **\*\*kwargs** – any top-level kwarg in the following query. Most frequently queried via stationID.

**Query:**

```
(getAlarmsSearchQuery){ orgID = None organizationName = None stationID = None stationName
= None sgID = None sgName = None startTime = None endTime = None portNumber = None
startRecord = None numTransactions = None
}
```

**Reply:**

```
(reply){ responseCode = "100" responseText = "API input request executed successfully." Alarms[]
=
(oalarms){ stationID = "1:00001" stationName = "CHARGEPOINT / MAIN 001" station-
Model = "CT2100-HD-CCR" orgID = "1:ORG00001" organizationName = "My Orga-
nization Name" stationManufacturer = Chargepoint stationSerialNum = "000000000001"
portNumber = None alarmType = "Reachable" alarmTime = 2016-12-12 12:34:56+00:00
recordNumber = 1
moreFlag = 0
}
```

**getCPNInstances** ()

Returns ChargePoint network objects.

Generally not useful expect that it returns the all important CPNID which is needed to construct the orgID, described as CPNID:CompanyID.

For North America, the CPNID is '1'.



**getChargingSessionData** (\*\*kwargs)

Returns a list of charging sessions based on search query.

Returns a list of Charging Sessions. If there are more than 100 records returned by the query, there will be a MoreFlag return value of 1.

**Parameters** **\*\*kwargs** – any top-level kwarg in the following query. Most frequently queried via stationID.

**Query:**

```
(sessionSearchdata){ stationID = None sessionID = None stationName = None Address = None
City = None State = None Country = None postalCode = None Proximity = None proximityUnit
= None fromTimeStamp = None toTimeStamp = None startRecord = None Geo =

  (geoData){ Lat = None Long = None

  }

}
```

**Reply:**

```
(reply){ responseCode = "100" responseText = "API input request executed successfully." Charg-
ingSessionData[] =

  (sessionSearchResultdata){ stationID = "1:00001" stationName = "CHARGEPOINT /
MAIN 001" portNumber = "2" Address = "1 Main St, Oakland, California, 94607,
United States" City = "Oakland" State = "California" Country = "United States" postal-
Code = "94607" sessionID = 12345678 Energy = 12.345678 startTime = 2016-01-01
01:01:01+00:00 endTime = 2016-01-01 12:12:02+00:00 userID = "123456" recordNum-
ber = 1 credentialID = "123456789"

  moreFlag = 0

}
```

**getLoad** (\*\*kwargs)

Returns current load of charging station sessions.

Returns Load on Charging stations/groups as defined by input query. If sgID is not included, many group level parameters will be returned as 'None.'

**Parameters** **\*\*kwargs** – sgID or stationID.

**Reply:**

```
(reply){

  responseCode = "100" responseText = "API input request executed successfully." numSta-
tions = None groupName = None sgLoad = None stationData[] =

  (stationloaddata){ stationID = "1:000013" stationName = "CHARGEPOINT / MAIN
001" Address = "1 Main St, Oakland, California, 94607, United States" stationLoad
= 1.1 Port[] =

    (stationPortData){ portNumber = "1" userID = None credentialID = None
shedState = 0 portLoad = 0.0 allowedLoad = 0.0 percentShed = "0"

    }, (stationPortData){

      portNumber = "2" userID = "123456" credentialID = "123456789" shed-
State = 0 portLoad = 1.1 allowedLoad = 0.0 percentShed = "0"

    }

  }

}
```

```
    },  
  }  
}
```

**getOrgsAndStationGroups** (*\*\*kwargs*)

Returns orgnaizations and their station groups.

Get all organization and station group identifiers.

**Parameters** **\*\*kwargs** – any top-level kwarg in the following query. Most frequently queried via stationID.

**Query:**

```
(getOrgsAndStationGroupsSearchQuery){ orgID = None organizationName = None sgID =  
  None sgName = None  
}
```

**Reply:**

```
(reply){ responseCode = "100" responseText = "API input request executed successfully." org-  
  Data[] =  
    (ohostdata){ orgID = "1:ORG00001" organizationName = "My Organization  
      Name" sgData[] =  
        (sgData){ sgID = 00001 sgName = "Main St Garage" parent-  
          GroupID = "0"  
        }  
      }  
    }  
}
```

**getStationGroupDetails** (*sgID*, *\*stationID*)

Gives details for a given station group.

**Parameters**

- **sgID** – groupID of stations to clear.
- **stationID** – (Optional) ID of individual station to clear. If this is used, only that station will be

returned in the stationData list. If this parameter is given, numStations will return 1

:returns SOAP reply object. If successful, there will be a responseCode of '100'.

**Reply:**

```
(reply){  
  responseCode = "100" responseText = "API input request executed successfully."  
  groupName = "My Group Name" numStations = 1 stationData[] =  
    (stationGroupData){ stationID = "1:00001" stationName =  
      "CHARGEPOINT / MAIN 001" Address = "1 Main St, Oak-  
        land, California, 94607, United States"  
    }  
}
```

**getStationGroups** (*orgID*)

Returns a list of groups and their stations belonging to an organization.

**Parameters** **orgID** – Chargepoint Organization ID

**Reply:**

```
(reply){ responseCode = "100" responseText = "API input request executed successfully." group-  
  Data[] =
```

```

(groupsdata){ sgID = 00001 orgID = "1:ORG00001" sgName = "Main St
Garage" organizationName = "My Organization Name" stationData[] =
  (stationData){ stationID = "1:00001" Geo =
    (geoData){ Lat = "12.345678901234567" Long = "-
123.456789012345678"
    }
  }
}

```

#### **getStationRights** (\*\*kwargs)

Returns station rights profiles as defined by the given query parameters.

It is worth noting that there may be more than one rights profile for a given station. A profile defined the relationship between a charge station and a group and a charge station may belong to multiple groups.

**Parameters** **\*\*kwargs** – any top-level kwarg in the following query. Most frequently queried via stationID.

#### **Query:**

```

(stationRightsSearchRequest){ stationID = None stationManufacturer = None stationModel =
None stationName = None serialNumber = None Address = None City = None State = None
Country = None postalCode = None Proximity = None proximityUnit = None Connector =
None Voltage = None Current = None Power = None demoSerialNumber =

  (serialNumberData){ serialNumber[] = <empty>
  }

  Reservable = None Geo =

  (geoData){ Lat = None Long = None
  }

  Level = None Mode = None Pricing =

  (pricingOptions){ startTime = None Duration = None energyRequired = None
vehiclePower = None
  }

  orgID = None organizationName = None sgID = None sgName = None provisionDateRange =
=

  (provisionDateRange){ startDate = None endDate = None
  }

  currentFault = None portStatus = None adminStatus = None networkStatus = None provi-
sionStatus = None startRecord = None
}

```

#### **Reply:**

```

(reply){ responseCode = "100" responseText = "API input request executed successfully." rights-
Data[] =

  (rightsData){ sgID = "00001" sgName = "Main St Garage" stationRightsPro-
file = "network_manager" stationData[] =

    (stationDataRights){ stationID = "1:00001" station-
Name = "CHARGEPOINT / MAIN 001" station-
SerialNum = "0000000000001" stationMacAddr =
"0123:4567:89AB:CDEF"
    }
  }
}

```

```
        moreFlag = 0
    }

getStationStatus (station)
    Get port-level charging status for a given station
    Parameters station – stationID to query

Reply:
    (reply){ responseCode = “100” responseText = “API input request executed successfully.” station-
        Data[] =
            (oStatusdata){ stationID = “1:00001” Port[] =
                (portDataStatus){ portNumber = “1” Status = “AVAILABLE”
                    TimeStamp = 2016-12-12 12:34:56+00:00
                }
            }
        moreFlag = 0
    }
```

**getStations** (*\*\*kwargs*)

Returns a list of Chargepoint Stations based on keyword query args

It is worth noting that only stations the client has access to will be returned.

**Parameters** *\*\*kwargs* – any top-level kwarg in the following query. Most frequently queried via stationID.

**Query:**

```
(stationSearchRequestExtended){ stationID = None stationManufacturer = None stationModel =
    None stationName = None serialNumber = None Address = None City = None State = None
    Country = None postalCode = None Proximity = None proximityUnit = None Connector =
    None Voltage = None Current = None Power = None demoSerialNumber =
        (serialNumberData){ serialNumber[] = <empty>
        }
    Reservable = None Geo =
        (geoData){ Lat = None Long = None
        }
    Level = None Mode = None Pricing =
        (pricingOptions){ startTime = None Duration = None energyRequired = None
            vehiclePower = None
        }
    orgID = None organizationName = None sgID = None sgName = None stationActivationDate
    = None startRecord = None numStations = None
}
```

**Reply:**

```
(reply){ responseCode = “100” responseText = “API input request executed successfully.” station-
    Data[] =
        (stationDataExtended){ stationID = “1:00001” stationManufacturer =
            “ChargePoint” stationModel = “CT2100-HD-CCR” stationMacAddr =
            “0123:4567:89AB:CDEF” stationSerialNum = “000000000001” station-
            ActivationDate = 2016-01-01 12:23:45 Address = “1 Main St ” City =
            “Oakland” State = “California” Country = “United States” postalCode =
            “94607” Port[] =
```

```
(portData){ portNumber = "1" stationName = "CHARGE-
POINT / MAIN 001" Geo =
```

```
(geoData){ Lat = "12.345678901234567" Long = "-
123.456789012345678"
```

```
}
```

```
Description = "Use garage entrance on Main St., turn right
and follow ... Reservable = 0 Level = "L1" Connector =
"NEMA 5-20R" Voltage = "120" Current = "16" Power =
"1.920" estimatedCost = 0.0
```

```
Pricing[] =
```

```
(pricingSpecification){ Type = "None" startTime = 00:00:00 end-
Time = 23:59:59 minPrice = 0.0 maxPrice = 0.0 unitPricePerHour
= 0.0 unitPricePerSession = 1.0 unitPricePerKWh = 0.2
```

```
},
```

```
numPorts = 2 mainPhone = "1-888-123-4567" currencyCode = "USD"
orgID = "1:ORG00001" organizationName = "My Organization Name"
sgID = "00001, 00002, 00003, 00004, 00005, 00006, 00007, 00008, 00009,
... sgName = "Main St Garage, Public Garages, California Stations, ...
```

```
moreFlag = 0
```

```
}
```

```
getUsers (**kwargs)
```

Returns a list of Users as defined by the given query parameters

**Parameters** **\*\*kwargs** – any top-level kwarg in the following query. Most frequently queried via userID or credentialID.

**Query:**

```
(getUsersSearchRequest){ userID = None firstName = None lastName = None lastModified-
TimeStamp = None Connection =
```

```
(connectionDataRequest){
```

```
Status =
```

```
(connectedUserStatusTypes){ value = None
```

```
}
```

```
customInfo =
```

```
(customInfoData){ Key = None Value = None
```

```
}
```

```
}
```

```
managementRealm =
```

```
(managementRealmRequest){
```

```
Status =
```

```
(managedUserStatusTypes){ value = None
```

```
}
```

```
        customInfo =
            (customInfoData){ Key = None Value = None
            }
        }
        credentialID = None startRecord = None numUsers = None
    }
Reply
    (reply){ responseCode = "100" responseText = "API input request executed successfully." users =
        (userParams){
            user[] =
                (userData){ lastModifiedTimestamp = 2016-11-11 01:23:45+00:00
                    userID = "123456" firstName = "John" lastName = "Doe" Con-
                    nection =
                        (connectionData){ Status = "APPROVED" requestTimeS-
                        tamp = 2016-11-11 01:23:45+00:00 customInfos =
                            (customInfosData){
                                customInfo[] =
                                    (customInfoData){ Key = "Custom Key"
                                        Value = "Custom Value"
                                    }
                                }
                            }
                        managementRealm = "" credentialIDs =
                            (credentialIDsData){
                                credentialID[] = "123456789", ...
                            }
                        recordNumber = 1
                    moreFlag = 0
                }
            }
        }
set_client (client)
set_security_token ()
shedLoad (**kwargs)
    Reduce load on a Charegepoint station.

    Main functionality for reducing load on a chargepoint station. Can pass either allowedLoadPerStation OR
    percentShedPerStation, but not both (one must be None).
        Parameters **kwargs – Input parameters for shedding load. One of allowedLoadPerSta-
            tion and percentshedPerStation
            must be included.
    Query:
        (shedLoadQueryInputData){
            shedGroup =
```

```

        (shedLoadGroupInputData){ sgID = None allowedLoadPerStation = None per-
            centShedPerStation = None
        }
    shedStation =
        (shedLoadStationInputData){ stationID = None allowedLoadPerStation = None
            percentShedPerStation = None Ports =
                (Ports){ Port[] = <empty>
                    }
            }
        timeInterval = None
    }
    :returns SOAP reply object. If successful, there will be a responseCode of '100'.

```

```

class platform_driver.interfaces.chargepoint.service.CPStation(cps, sld=None,
                                                                sde=None)

```

Bases: `object`

Wrapper around the getStations() return by Chargepoint API.

Data surrounding a Chargepoint Station can generally be categorized as static or dynamic. Chargepoint API has two basic calls, getLoad and getStation, that each return station data. getLoad returns the stationLoadData SUDS object, and getStation returns the stationDataExtended SUDS object. These are each kept as separate meta-data parameters.

#### Parameters

- **cps** – Chargepoint Service object.
- **sld** – stationLoadData SUDS object.
- **sde** – stationDataExtended SUDS object.

```

(stationDataExtended){ stationID = "1:00001" stationManufacturer = "ChargePoint" stationModel =
    "CT2100-HD-CDMA-CCR" stationMacAddr = "0123:4567:89AB:CDEF" stationSerialNum =
    "0000000000001" stationActivationDate = 2016-01-01 12:23:45 Address = "1 Main St " City =
    "Oakland" State = "California" Country = "United States" postalCode = "94607" Port[] =
        (portData){ portNumber = "1" stationName = "CHARGEPOINT / MAIN 001" Geo =
            (geoData){ Lat = "12.345678901234567" Long = "-
                123.456789012345678"
            }
            Description = "Use garage entrance on Main St., turn right and follow ... Reservable
            = 0 Level = "L1" Connector = "NEMA 5-20R" Voltage = "120" Current = "16" Power
            = "1.920" estimatedCost = 0.0
        }, (portData){
            portNumber = "2" stationName = "CHARGEPOINT / MAIN 001" Geo =
                (geoData){ Lat = "12.345678901234567" Long = "-
                    123.456789012345678"
                }
                Description = "Use garage entrance on Main St., turn right and follow ...
                Reservable = 0 Level = "L2" Connector = "J1772" Voltage = "240" Current
                = "30" Power = "6.600" estimatedCost = 0.0
            },
        },
    Pricing[] =
        (pricingSpecification){ Type = "None" startTime = 00:00:00 endTime = 23:59:59 minPrice = 0.0
            maxPrice = 0.0 unitPricePerHour = 0.0 unitPricePerSession = 1.0 unitPricePerKWh = 0.2
        },
    },

```

```

numPorts = 2 mainPhone = "1-888-123-4567" currencyCode = "USD" orgID = "1:ORG00001" organi-
zationName = "My Organization Name" sgID = "00001, 00002, 00003, 00004, 00005, 00006, 00007,
00008, 00009, ..." sgName = "Main St Garage, Public Garages, California Stations, ..."
}
(stationloaddata){ stationID = "1:00001" stationName = "CHARGEPOINT / MAIN 001" Address = "1 Main
St, Oakland, California, 94607, United States" stationLoad = 5.43 Port[] =
  (stationPortData){ portNumber = "1" userID = None credentialID = None shedState = 0
    portLoad = 0.0 allowedLoad = 0.0 percentShed = "0"
  }, (stationPortData){
    portNumber = "2" credentialID = "ABC000123456" shedState = 0 portLoad =
    5.43 allowedLoad = 0.0 percentShed = "0"
  },
}
}
Property id sde.stationID
Property manufacturer sde.stationManufacturer
Property model sde.stationModel
Property mac sde.stationMacAddr
Property serial sde.stationSerialNum
Property activationDate sde.stationActivationDate
Property name sld.stationName
Property load sld.stationLoad
property activationDate
property id
property load
property mac
property manufacturer
property model
property name
property organization
property ports
refreshStationData()
refreshStationDataExtended()
property serial
class platform_driver.interfaces.chargepoint.service.CPStationGroup(cps,
                                                                    groups-
                                                                    data)
Bases: object
Wrapper around the getStationGroups() return by Chargepoint API.
Parameters
  • cps – Chargepoint Service object.
  • groupsdata – Returned from Chargepoint API. Defined below.
(groupsdata){ sgID = 00001 orgID = "1:ORG00001" sgName = "Main St Garage" organizationName = "My
Organization Name" stationData[] =
  (stationData){ stationID = "1:00001" Geo =
    (geoData){ Lat = "12.345678901234567" Long = "-
123.456789012345678"

```



```

    }
}
    Property id sgID
    Property name sgName
    Property organization CPOrganization __str__ representation
    Property station_ids List of IDs for stations in belonging to the group
property id
property name
property organization
property station_ids

```

`platform_driver.interfaces.modbus_tk` package

Subpackages

`platform_driver.interfaces.modbus_tk.maps` package

`platform_driver.interfaces.modbus_tk.tests` package

Subpackages

`platform_driver.interfaces.modbus_tk.tests.example_config` package

`platform_driver.interfaces.modbus_tk.tests.modbus_listener_agent` module

`platform_driver.interfaces.modbus_tk.tests.modbus_server` module

`platform_driver.interfaces.modbus_tk.tests.test_battery_meter` module

`platform_driver.interfaces.modbus_tk.tests.test_ion6200` module

`platform_driver.interfaces.modbus_tk.tests.test_mixed_endian` module

`platform_driver.interfaces.modbus_tk.tests.test_modbus_tk_driver` module

`platform_driver.interfaces.modbus_tk.tests.test_scale_reg` module

`platform_driver.interfaces.modbus_tk.tests.test_scale_reg_pow_10` module

`platform_driver.interfaces.modbus_tk.tests.test_scrape_all` module

`platform_driver.interfaces.modbus_tk.tests.test_watts_on` module

`platform_driver.interfaces.modbus_tk.tests.test_write_single_registers` module

`platform_driver.interfaces.modbus_tk.client` module

`platform_driver.interfaces.modbus_tk.config_cmd` module

`platform_driver.interfaces.modbus_tk.helpers` module

`platform_driver.interfaces.modbus_tk.server` module

`platform_driver.interfaces.ted_meter` package

The TED Driver allows scraping of TED Pro Meters via an HTTP API

```
class platform_driver.interfaces.ted_meter.Interface (**kwargs)
    Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.
            BaseInterface
```

Create an interface for the TED device using the standard BaseInterface convention

```
configure (config_dict, registry_config_str)
```

Configure method called by the platform driver with configuration stanza and registry config file, we ignore the registry config, as we build the registers based on the configuration collected from TED Pro Device

```
get_data ()
```

returns a tuple of ETree objects corresponding to the three aapi endpoints

```
get_point (point_name)
```

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

```
insert_register (register)
```

We override the default insert\_register behavior so that we can automatically create additional totalized registers when track\_totalizers is True

```
class platform_driver.interfaces.ted_meter.Register (volttron_point_name, units, de-
                                                    scription)
```

Bases: `platform_driver.interfaces.BaseRegister`

Generic class for containing information about a the points exposed by the TED Pro API

**Parameters**

- **register\_type** (*str*) – Type of the register. Either “bit” or “byte”. Usually “byte”.
- **pointName** (*str*) – Name of the register.
- **units** (*str*) – Units of the value of the register.
- **description** (*str*) – Description of the register.

The TED Meter Driver does not expose the read\_only parameter, as the TED API does not support writing data.

**platform\_driver.interfaces.IEEE2030\_5 module**

```
class platform_driver.interfaces.IEEE2030_5.IEEE2030_5Register (read_only,  

                                                             point_name,  

                                                             IEEE2030_5_resource_name,  

                                                             IEEE2030_5_field_name,  

                                                             units,  

                                                             data_type, de-  

                                                             fault_value=None,  

                                                             description="")
```

Bases: *platform\_driver.interfaces.BaseRegister*

Register for all IEEE 2030.5 interface attributes.

**is\_stale** ()

**set\_value** (*x*)

Cast the point value to the correct data type, set the register value, update the cache timestamp.

**property value**

```
class platform_driver.interfaces.IEEE2030_5.Interface (**kwargs)
```

Bases: *platform\_driver.interfaces.BasicRevert*, *platform\_driver.interfaces.BaseInterface*

IEEE 2030.5 device driver interface.

This driver gets, and sends, device data by issuing RPC calls to IEEE 2030.5Agent, (see its source code in services/core/IEEE2030\_5Agent), which communicates with IEEE 2030.5 devices via a web interface.

For further information about this subsystem, please see the VOLTTRON IEEE 2030.5 DER Support specification, which is located in VOLTTRON readthedocs under specifications/IEEE2030\_5\_agent.html.

Test drivers for the IEEE 2030.5 interface can be configured as follows:

```
cd $VOLTTRON_ROOT export DRIVER_ROOT=$VOLTTRON_ROOT/services/core/PlatformDriverAgent/platform_driver
volttron-ctl config store platform.driver IEEE2030_5.csv $DRIVER_ROOT/IEEE2030_5.csv
-csv volttron-ctl config store platform.driver devices/IEEE2030_5_1
$DRIVER_ROOT/test_IEEE2030_5_1.config volttron-ctl config store platform.driver de-
vices/IEEE2030_5_2 $DRIVER_ROOT/test_IEEE2030_5_2.config echo IEEE2030_5 drivers
configured for PlatformDriver: volttron-ctl config list platform.driver
```

**call\_agent\_config\_points** ()

Issue a IEEE2030\_5Agent RPC call to initialize the point configuration.

**call\_agent\_rpc** (*rpc\_name*, *point\_name=None*, *value=None*)

Issue a IEEE2030\_5Agent RPC call (get\_point, get\_points, or set\_point), and return the result.

**configure** (*config\_dict*, *registry\_config*)

Configures the *Interface* for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of BaseRegister (or a subclass) and adding them to the Interface with BaseInterface.insert\_register().

**get\_point** (*point\_name*, *\*\*kwargs*)

Get the point value, fetching it from IEEE2030\_5Agent if not already cached.

**get\_point\_map()**

Return a dictionary of all register definitions, indexed by Volttron Point Name.

**get\_register\_value(point\_name)**

### platform\_driver.interfaces.bacnet module

**class** platform\_driver.interfaces.bacnet.**Interface** (\*\*kwargs)

Bases: platform\_driver.interfaces.BaseInterface

**configure** (config\_dict, registry\_config\_str)

Configures the *Interface* for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of BaseRegister (or a subclass) and adding them to the Interface with BaseInterface.insert\_register().

**establish\_cov\_subscription** (point\_name, lifetime, renew=False)

Asks the BACnet proxy to establish a COV subscription for the point via RPC. If lifetime is specified, the subscription will live for that period, else the subscription will last indefinitely. Default period of 3 minutes. If renew is True, the the core scheduler will call this method again near the expiration of the subscription.

**get\_point** (point\_name, get\_priority\_array=False)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

**parse\_config** (configDict)

**ping\_target** ()

**revert\_all** (priority=None)

Revert entire device to it's default state

**revert\_point** (point\_name, priority=None)

Revert point to it's default state

**schedule\_ping** ()

**scrape\_all** ()

Method the Platform Driver Agent calls to get the current state of a device for publication.

**Returns** Point names to values for device.

**Return type** dict

**set\_point** (point\_name, value, priority=None)

Set the current value for the point name given.

Implementations of this method should make a reasonable effort to return the actual value the point was set to. Some protocols/devices make this difficult. (I'm looking at you BACnet) In these cases it is acceptable to return the value that was requested if no error occurs.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.

- **value** – Value to set the point to.
- **kwargs** – Any interface specific parameters.

**Returns** Actual point value set.

```
class platform_driver.interfaces.bacnet.Register (instance_number, object_type, prop-
    erty_name, read_only, point_name,
    units, description="", priority=None,
    list_index=None)
```

Bases: `platform_driver.interfaces.BaseRegister`

### platform\_driver.interfaces.dnp3 module

```
class platform_driver.interfaces.dnp3.DNP3Register (read_only,          volttron_name,
    dnp3_name,          scaling,      units,
    data_type)
```

Bases: `platform_driver.interfaces.BaseRegister`

Register for each DNP3 interface field (point).

**is\_stale** ()

Whether it is time to refresh the register's cached value.

**set\_value** (*x*)

Cast the point value to the correct data type, set the register value, update the cache timestamp.

**property value**

```
class platform_driver.interfaces.dnp3.Interface (**kwargs)
```

Bases: `platform_driver.interfaces.BasicRevert`, `platform_driver.interfaces.BaseInterface`

DNP3 device driver interface.

This driver gets, and sends, DNP3 device data by issuing RPC calls to DNP3Agent, (see its source code in services/core/DNP3Agent), which communicates with the DNP3 master via a web interface.

Test drivers for the DNP3 interface can be configured as follows:

```
export      VOLTTRON_ROOT=<your      VOLTTRON      install      directory>      export
DRIVER_ROOT=$VOLTTRON_ROOT/services/core/PlatformDriverAgent cd $VOLTTRON_ROOT volttron-
ctl config store platform.driver dnp3.csv $DRIVER_ROOT/example_configurations/dnp3.csv -csv volttron-ctl
config store platform.driver devices/dnp3 $DRIVER_ROOT/example_configurations/test_dnp3.config
```

**all\_registers** ()

Return a list of all registers. The read-only registers are placed before the read-write registers.

**call\_agent\_config\_points** ()

Issue a DNP3Agent RPC call to initialize the driver's point configuration.

The point\_map dictionary maps VOLTTRON point name to DNP3 point name for each point that's configured by the driver:

```
{ volttron_point_name_1:          dnp3_point_name_1,          volttron_point_name_2:
    dnp3_point_name_2, ...
}
```

**call\_agent\_rpc** (*rpc\_name, point\_name=None, value=None*)

Issue a DNP3Agent RPC call (get\_point, get\_points, or set\_point), and return the result.

**configure** (*config\_dict, registry\_config*)

Load driver config from the registry, as set up in the VOLTTRON config store.

**get\_point** (*point\_name*, *\*\*kwargs*)  
Get a point value by (VOLTTRON) point name.  
  
Fetch it from the DNP3Agent if it's not already fresh in the cache.

**get\_register\_value** (*point\_name*)

### platform\_driver.interfaces.ecobee module

**class** platform\_driver.interfaces.ecobee.**Hold** (*thermostat\_identifier*, *read\_only*, *readable*,  
*point\_name*, *point\_path*, *units*, *description=""*)  
Bases: platform\_driver.interfaces.BaseRegister  
Register to wrap around points contained in hold field of Ecobee API's thermostat data response

**get\_state** (*ecobee\_data*)  
**Parameters** *ecobee\_data* – Ecobee data dictionary obtained from Driver HTTP Cache  
*agent*  
**Returns** Most recently available data for this setting register

**set\_state** (*value*, *access\_token*)  
Set Ecobee thermostat hold by configured point name and provided value dictionary :param value: Arbitrarily specified value dictionary. Ecobee API documentation provides best practice information for each hold. :param access\_token: Ecobee access token to provide as bearer auth in request :return: request response values from settings request

**class** platform\_driver.interfaces.ecobee.**Interface** (*\*\*kwargs*)  
Bases: platform\_driver.interfaces.BasicRevert, platform\_driver.interfaces.BaseInterface  
Interface implementation for wrapping around the Ecobee thermostat API

**authorize\_application** ()

**configure** (*config\_dict*, *registry\_config\_str*)  
Interface configuration callback :param config\_dict: Driver configuration dictionary :param registry\_config\_str: Driver registry configuration dictionary

**get\_auth\_config\_from\_store** ()  
**Returns** Fetch currently stored auth configuration info from config store, returns empty dict if none is present

**get\_data\_cache** (*url*, *update\_frequency*)  
Fetches data from cache dict if it is up to date :param url: URL to use to use as lookup value in cache dict :param update\_frequency: duration in seconds for which data in cache is considered up to date :return: Data stored in cache if up to date, otherwise None

**get\_data\_remote** (*request\_type*, *url*, *\*\*kwargs*)  
Make request to Ecobee remote API for “register” data, updating authorization tokens as necessary :param request\_type: HTTP request type for making request :param url: URL corresponding to “register” data :param kwargs: HTTP request arguments :return: remote API response body

**get\_ecobee\_data** (*request\_type*, *url*, *update\_frequency*, *refresh=False*, *\*\*kwargs*)  
Checks cache for up to date Ecobee data. If none is available for the URL, makes a request to remote Ecobee API. :param refresh: force Ecobee data to be obtained from the remote API rather than cache :param request\_type: HTTP request type for request sent to remote :param url: URL of remote Ecobee API endpoint :param update\_frequency: period for which cached data is considered up to date :param kwargs: HTTP request arguments :return: Up to date Ecobee data for URL

**get\_point** (*point\_name*, *\*\*kwargs*)  
 Return a point's most recent stored value from remote API :param point\_name: The name of the point corresponding to a register to get the state of :return: register's most recent state from remote API response

**get\_thermostat\_data** (*refresh=False*)  
 Collects most up to date thermostat object data for the configured Ecobee thermostat ID :param refresh: whether or not to force obtaining new data from the remote Ecobee API

**parse\_config** (*config\_dict*)  
 Parse driver registry configuration and create device registers :param config\_dict: Registry configuration in dictionary representation

**refresh\_tokens** ()  
 Refresh Ecobee API authentication tokens via API endpoint - asks Ecobee to reset tokens then updates config with new tokens from Ecobee

**request\_tokens** ()  
 Request up to date Auth tokens from Ecobee using API key and authorization code

**store\_remote\_data** (*url, response*)  
 Store response body with a timestamp for a given URL :param url: url to use to use as lookup value in cache dict :param response: request response body to store in cache

**update\_auth\_config** ()  
 Update the platform driver configuration for this device with new values from auth functions

**update\_authorization** ()

**class** platform\_driver.interfaces.ecobee.**Program** (*thermostat\_identifier*)  
 Bases: *platform\_driver.interfaces.BaseRegister*  
 Wrapper register for managing Ecobee thermostat programs, and getting program status

**get\_state** (*ecobee\_data*)  
**Parameters** *ecobee\_data* – Ecobee data dictionary obtained from Driver HTTP Cache  
 agent  
**Returns** List of Ecobee event objects minus vacation events

**set\_state** (*program, access\_token, resume\_all=False*)  
 Set a new program, resume the next program on the programs stack, or “resume all” :param program: Program dictionary as specified by Ecobee API docs if setting a new program, else None :param access\_token: Ecobee access token to provide as bearer auth in request :param resume\_all: Whether or not to “resume all” if using the resume program function

**class** platform\_driver.interfaces.ecobee.**Setting** (*thermostat\_identifier, read\_only, readable, point\_name, point\_path, units, description=""*)  
 Bases: *platform\_driver.interfaces.BaseRegister*  
 Register to wrap around points contained in setting field of Ecobee API's thermostat data response

**get\_state** (*ecobee\_data*)  
**Parameters** *ecobee\_data* – Ecobee data dictionary obtained from Driver HTTP Cache  
 agent  
**Returns** Most recently available data for this setting register

**set\_state** (*value, access\_token*)  
 Set Ecobee thermostat setting value by configured point name and provided value :param value: Arbitrarily specified value to request as set point :param access\_token: Ecobee access token to provide as bearer auth in request :return: request response values from settings request

```
class platform_driver.interfaces.ecobee.Status (thermostat_identifier)
```

Bases: *platform\_driver.interfaces.BaseRegister*

Status request wrapper register for Ecobee thermostats. Note: There is a single status point for each thermostat, which is set by the device.

```
get_state (ecobee_data)
```

**Returns** List of currently running equipment connected to Ecobee thermostat

```
set_state (value, access_token)
```

Set state is not supported for the static Status register.

```
class platform_driver.interfaces.ecobee.Vacation (thermostat_identifier)
```

Bases: *platform\_driver.interfaces.BaseRegister*

Wrapper register for adding and deleting vacations, and getting vacation status Note: Since vacations are transient, only 1 vacation register will be created per driver. The driver can be used to add, delete, or get the status of all vacations for the device

```
get_state (ecobee_data)
```

**Parameters** *ecobee\_data* – Ecobee data dictionary obtained from Driver HTTP Cache  
*agent*

**Returns** List of vacation dictionaries returned by Ecobee remote API

```
set_state (vacation, access_token, delete=False)
```

Send delete or create vacation request to Ecobee API for the configured thermostat :param vacation: Vacation name for delete, or vacation object dictionary for create :param access\_token: Ecobee access token to provide as bearer auth in request :param delete: Whether to delete the named vacation

```
platform_driver.interfaces.ecobee.call_grequest (method_name, url, **kwargs)
```

Make grequest calls to remote api :param method\_name: method type - put/get/delete :param url: http URL suffix :param kwargs: Additional arguments for http request :return: grequest response

```
platform_driver.interfaces.ecobee.make_ecobee_request (request_type, url, **kwargs)
```

Wrapper around making arbitrary GET and POST requests to remote Ecobee API :return: Ecobee API response using provided request content

```
platform_driver.interfaces.ecobee.populate_selection_objects (access_token,  
                                                             selection_type,  
                                                             selection_match,  
                                                             specification)
```

Utility method for generating set point request bodies for Ecobee remote api :param access\_token: Ecobee access token from auth steps/configuration (bearer in request header) :param selection\_type: Ecobee identity selection type :param selection\_match: Ecobee identity selection match id :param specification: dictionary specifying the Ecobee object for updating the point on the remote API :return: request body JSON as dictionary

```
platform_driver.interfaces.ecobee.populate_thermostat_headers (access_token)
```

Create populated header json as dictionary :param access\_token: Ecobee “bearer” access token :return: header json as dictionary



**platform\_driver.interfaces.fakedriver module**

```
class platform_driver.interfaces.fakedriver.EKGregister(read_only, pointName,
                                                    units, reg_type, de-
                                                    fault_value=None, de-
                                                    scription=")
```

Bases: `platform_driver.interfaces.BaseRegister`

**property value**

```
class platform_driver.interfaces.fakedriver.FakeRegister(read_only, pointName,
                                                    units, reg_type, de-
                                                    fault_value=None,
                                                    description=")
```

Bases: `platform_driver.interfaces.BaseRegister`

```
class platform_driver.interfaces.fakedriver.Interface(**kwargs)
Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.
BaseInterface
```

```
configure(config_dict, registry_config_str)
```

Configures the `Interface` for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the `Interface` with `BaseInterface.insert_register()`.

```
get_point(point_name)
```

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

```
parse_config(configDict)
```

**platform\_driver.interfaces.modbus module**

```
class platform_driver.interfaces.modbus.Interface(**kwargs)
Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.
BaseInterface
```

```
build_ranges_map()
```

```
configure(config_dict, registry_config_str)
```

Configures the `Interface` for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

**get\_point** (*point\_name*)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

**insert\_register** (*register*)

Inserts a register into the *Interface*.

**Parameters** **register** (`BaseRegister`) – Register to add to the interface.

**merge\_register\_ranges** ()

Merges any adjacent registers for more efficient scraping. May only be called after all registers have been inserted.

**parse\_config** (*configDict*)

**scrape\_bit\_registers** (*client, read\_only*)

**scrape\_byte\_registers** (*client, read\_only*)

```
class platform_driver.interfaces.modbus.ModbusBitRegister(address, type_string,
                                                         pointName,
                                                         units, read_only,
                                                         mixed_endian=False,
                                                         description="",
                                                         slave_id=0)
```

Bases: `platform_driver.interfaces.modbus.ModbusRegisterBase`

**get\_register\_count** ()

**get\_state** (*client*)

**parse\_value** (*starting\_address, bit\_stream*)

**set\_state** (*client, value*)

```
class platform_driver.interfaces.modbus.ModbusByteRegister(address, type_string,
                                                           pointName,
                                                           units, read_only,
                                                           mixed_endian=False,
                                                           description="",
                                                           slave_id=0)
```

Bases: `platform_driver.interfaces.modbus.ModbusRegisterBase`

**get\_register\_count** ()

**get\_state** (*client*)

**parse\_value** (*starting\_address, byte\_stream*)

**set\_state** (*client, value*)

```
exception platform_driver.interfaces.modbus.ModbusInterfaceException(string)
```

Bases: `pymodbus.exceptions.ModbusException`

```
class platform_driver.interfaces.modbus.ModbusRegisterBase (address, register_type,  
                                                         read_only, point-  
                                                         Name, units, descrip-  
                                                         tion=", slave_id=0)
```

Bases: `platform_driver.interfaces.BaseRegister`

```
platform_driver.interfaces.modbus.modbus_client (address, port)
```

### platform\_driver.interfaces.obix module

```
class platform_driver.interfaces.obix.Interface (**kwargs)
```

Bases: `platform_driver.interfaces.BasicRevert`, `platform_driver.interfaces.BaseInterface`

```
configure (config_dict, registry_config)
```

Configures the `Interface` for the specific instance of a device.

#### Parameters

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the `Interface` with `BaseInterface.insert_register()`.

```
get_point (point_name)
```

Get the current value for the point name given.

#### Parameters

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

Returns Point value

```
parse_config (configDict, url)
```

```
class platform_driver.interfaces.obix.Register (url, point_name, obix_point_name,  
                                                         obix_type_str, read_only, units, descrip-  
                                                         tion=")
```

Bases: `platform_driver.interfaces.BaseRegister`

```
get_value_async_result (username=None, password=None)
```

```
obix_types = {'bool': <function Register.<lambda>>, 'int': <class 'int'>, 'real': <
```

```
parse_result (xml_tree)
```

```
set_value_async_result (value, username=None, password=None)
```

### platform\_driver.interfaces.radiothermostat module

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```
class platform_driver.interfaces.radiothermostat.Interface (**kwargs)
    Bases: platform_driver.interfaces.BaseInterface

    configure (config_dict, registry_config_str)
        Configure the Interface

    get_point (point_name)
        Returns the value of a point on the device

    parse_config (configDict)

    ping_target (address)
        Ping target function not implemented for this interface

    revert_all ()
        Sets all points on the device to their default values

    revert_point (point_name)
        sets the value of a point to its default value

    scrape_all ()
        Scrapes the device for current status of all points

    set_point (point_name, value)
        Sets the value of a point o the devcie

class platform_driver.interfaces.radiothermostat.Register (read_only, pointName,
                                                         device_point_name,
                                                         units, default_value)
    Bases: platform_driver.interfaces.BaseRegister
    Inherits from Volttron Register Class
```

### **platform\_driver.interfaces.rainforesteagle module**

```
class platform_driver.interfaces.rainforesteagle.InstantaneousDemand
    Bases: platform_driver.interfaces.BaseRegister

    value ()

class platform_driver.interfaces.rainforesteagle.Interface (**kwargs)
    Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.BaseInterface

    configure (config_dict, register_config)
        Configures the Interface for the specific instance of a device.
        Parameters
```

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

**get\_point** (*point\_name*)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

```
class platform_driver.interfaces.rainforesteagle.NetworkStatus
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforesteagle.PeakDelivered
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforesteagle.PeakReceived
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforesteagle.PriceCluster
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforesteagle.SummationDelivered
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforesteagle.SummationReceived
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
platform_driver.interfaces.rainforesteagle.get_demand_peaks(key)
```

```
platform_driver.interfaces.rainforesteagle.get_summation(key)
```

### platform\_driver.interfaces.rainforestemu2 module

```
class platform_driver.interfaces.rainforestemu2.InstantaneousDemand
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforestemu2.Interface(**kwargs)
```

Bases: `platform_driver.interfaces.BasicRevert`, `platform_driver.interfaces.BaseInterface`

```
configure(config_dict, register_config)
```

Configures the `Interface` for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

**get\_point** (*point\_name*)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

```
class platform_driver.interfaces.rainforestemu2.NetworkInfo
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

```
class platform_driver.interfaces.rainforestemu2.PriceCluster
```

Bases: `platform_driver.interfaces.BaseRegister`

```
value()
```

**platform\_driver.interfaces.restful module**

```
class platform_driver.interfaces.restful.Interface(**kwargs)
```

Bases: `platform_driver.interfaces.BasicRevert`, `platform_driver.interfaces.BaseInterface`

**configure** (*config\_dict*, *registry\_config\_str*)

Configures the `Interface` for the specific instance of a device.

**Parameters**

- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

**get\_point** (*point\_name*, *\*\*kwargs*)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

**parse\_config** (*configDict*)

```
class platform_driver.interfaces.restful.Register(read_only, volttron_point_name,
                                                    units, description, point_name)
```

Bases: `platform_driver.interfaces.BaseRegister`

**platform\_driver.interfaces.thermostat\_api module**

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**class** platform\_driver.interfaces.thermostat\_api.**ThermostatInterface** (*url*)

Bases: `object`

Base interface to get and set values on the thermostat

**energy\_led** (*data*)

Controls energy led, possible values: 0,1,2,4

**fmode** (*data*)

Sets fan's mode

**get\_cool\_pgm** (*day=""*)

get cool program for a week or a specific day *day* = { 'mon', 'tue', 'wed', 'thu', 'fri', 'sat', 'sun' }

for a specific day, say thursday: `t.get_cool_pgm('thu')`

for a week: `t.get_cool_pgm()`

**get\_heat\_pgm** (*day=""*)

get heat program for a week or a specific day *day* = { 'mon', 'tue', 'wed', 'thu', 'fri', 'sat', 'sun' }

for a specific day, say thursday: `t.get_heat_pgm('thu')`

for a week: `t.get_heat_pgm()`

**hold** (*data*)

Sets hold controls

**mode** (*data*)

Sets operating mode

**model** ()

Returns device model

**over** (*data*)

Sets override controls

```
set_cool_pgm(schedules, day='')
    set cool program for a week or a specific day day = { 'mon','tue','wed','thu','fri','sat','sun' }

    for a spetic day, say 'thu' t.set_cool_pgm('{ "360, 80, 480, 80, 1080, 80, 1320 , 80", 'thu' })
    t.set_cool_pgm('{
        "1": [360, 70, 480, 70, 1080, 70, 1320, 70], "0": [360, 66, 480, 58, 1080, 66, 1320,
        58], "3": [360, 66, 480, 58, 1080, 66, 1320, 58], "2": [360, 66, 480, 58, 1080, 66,
        1320, 58], "5": [360, 66, 480, 58, 1080, 66, 1320, 58], "4": [360, 66, 480, 58, 1080,
        66, 1320, 58], "6": [360, 66, 480, 58, 1080, 66, 1320, 58]
    })
```

```
set_heat_pgm(schedules, day='')
    set heat program for a week or a specific day day = { 'mon','tue','wed','thu','fri','sat','sun' }

    for a spetic day, say 'thu'
```

```
t.set_heat_pgm('{ "360, 80, 480, 80, 1080, 80, 1320 , 80", 'thu' })
```

for a week

```
t.set_heat_pgm('{
    "1": [360, 70, 480, 70, 1080, 70, 1320, 70],
    "0": [360, 66, 480, 58, 1080, 66, 1320, 58],
    "3": [360, 66, 480, 58, 1080, 66, 1320, 58],
    "2": [360, 66, 480, 58, 1080, 66, 1320, 58],
    "5": [360, 66, 480, 58, 1080, 66, 1320, 58],
    "4": [360, 66, 480, 58, 1080, 66, 1320, 58],
    "6": [360, 66, 480, 58, 1080, 66, 1320, 58]
})
```

**t\_cool** (*data*)  
Sets cooling setpoint

**t\_heat** (*data*)  
Sets heating setpoint

**t\_setpoint** (*data, point, tmode=""*)  
Sets cooling setpoint

**tstat** ()  
Returns current deicve paramenters

`platform_driver.interfaces.thermostat_api.Thermostat_API(url)`  
Call the interface

## platform\_driver.interfaces.universal module

08/15/16 - Remove whitespace in config file. 10/11/16 - Pass only device\_id to VehicleDriver. 03/01/17 -  
Call agent.GetPoint in get\_point. 04/17/17 - Updated for Volttron 4.0.

---

```
class platform_driver.interfaces.universal.Interface(**kwargs)
    Bases: platform_driver.interfaces.BasicRevert, platform_driver.interfaces.BaseInterface
```

**configure** (*config\_dict, registry\_config\_dict*)  
Configures the *Interface* for the specific instance of a device.

**Parameters**



- **config\_dict** (*dict*) – The “driver\_config” section of the driver configuration file.
- **registry\_config\_str** (*str*) – The contents of the registry configuration file.

This method must setup register representations of all points on a device by creating instances of `BaseRegister` (or a subclass) and adding them to the Interface with `BaseInterface.insert_register()`.

**get\_point** (*point\_name*)

Get the current value for the point name given.

**Parameters**

- **point\_name** (*str*) – Name of the point to retrieve.
- **kwargs** – Any interface specific parameters.

**Returns** Point value

**parse\_config** (*agent, device\_type, config\_dict, reg\_config\_str*)

## platform\_driver.agent module

**exception** platform\_driver.agent.**OverrideError**

Bases: `platform_driver.interfaces.DriverInterfaceError`

Error raised when the user tries to set/revert point when global override is set.

**class** platform\_driver.agent.**PlatformDriverAgent** (*driver\_config\_list, ability\_test=False, ability\_test\_iterations=3, driver\_scrape\_interval=0.02, group\_offset\_interval=0.0, max\_open\_sockets=None, max\_concurrent\_publishes=10000, system\_socket\_limit=None, publish\_depth\_first\_all=True, publish\_breadth\_first\_all=False, publish\_depth\_first=False, publish\_breadth\_first=False, \*\*kwargs*)

Bases: `volttron.platform.vip.agent.Agent`

**clear\_overrides** ()

RPC method

Clear all overrides.

**configure\_main** (*config\_name, action, contents*)

**derive\_device\_topic** (*config\_name*)

**forward\_bacnet\_cov\_value** (*source\_address, point\_name, point\_values*)

Called by the BACnet Proxy to pass the COV value to the driver agent for publishing :param source\_address: path of the device used for publish topic :param point\_name: name of the point in the COV notification :param point\_values: dictionary of updated values sent by the device

**get\_multiple\_points** (*path, point\_names, \*\*kwargs*)

**get\_override\_devices** ()

RPC method

Get a list of all the devices with override condition.

**get\_override\_patterns** ()

RPC method

Get a list of all the override patterns.

**get\_point** (*path*, *point\_name*, *\*\*kwargs*)

RPC method

Return value of specified device set point :param path: device path :type path: str :param point\_name: set point :type point\_name: str :param kwargs: additional arguments for the device :type kwargs: arguments pointer

**heart\_beat** ()

RPC method

Sends heartbeat to all devices

**remove\_driver** (*config\_name*, *action*, *contents*)

**revert\_device** (*path*, *\*\*kwargs*)

RPC method

Revert all the set point values of the device to default state/values. If global override is condition is set, raise OverrideError exception. :param path: device path :type path: str :param kwargs: additional arguments for the device :type kwargs: arguments pointer

**revert\_point** (*path*, *point\_name*, *\*\*kwargs*)

RPC method

Revert the set point to default state/value. If global override is condition is set, raise OverrideError exception. :param path: device path :type path: str :param point\_name: set point to revert :type point\_name: str :param kwargs: additional arguments for the device :type kwargs: arguments pointer

**scrape\_all** (*path*)

**scrape\_ending** (*topic*)

**scrape\_starting** (*topic*)

**set\_multiple\_points** (*path*, *point\_names\_values*, *\*\*kwargs*)

RPC method

Set values on multiple set points at once. If global override is condition is set, raise OverrideError exception. :param path: device path :type path: str :param point\_names\_values: list of points and corresponding values :type point\_names\_values: list of tuples :param kwargs: additional arguments for the device :type kwargs: arguments pointer

**set\_override\_off** (*pattern*)

RPC method

Turn off override condition on all the devices matching the pattern. The pattern matching is based on bash style filename matching semantics. :param pattern: Pattern on which override condition has to be removed. :type pattern: str

**set\_override\_on** (*pattern*, *duration=0.0*, *failsafe\_revert=True*, *staggered\_revert=False*)

RPC method

Turn on override condition on all the devices matching the pattern. :param pattern: Override pattern to be applied. For example,

If pattern is campus/building1/\* - Override condition is applied for all the devices under campus/building1/. If pattern is campus/building1/ahu1 - Override condition is applied for only campus/building1/ahu1 The pattern matching is based on bash style filename matching semantics.

**Parameters duration** – Time duration for the override in seconds. If duration  $\leq 0.0$ , it implies as indefinite

**duration.** :type duration: float :param failsafe\_revert: Flag to indicate if all the devices falling under the override condition has to be set to its default state/value immediately.

**Parameters staggered\_revert** (*boolean*) – If this flag is set, reverting of devices will be staggered.

**set\_point** (*path, point\_name, value, \*\*kwargs*)  
RPC method

Set value on specified device set point. If global override is condition is set, raise OverrideError exception.  
:param path: device path :type path: str :param point\_name: set point :type point\_name: str :param value: value to set :type value: int/float/bool :param kwargs: additional arguments for the device :type kwargs: arguments pointer

**stop\_driver** (*device\_topic*)

**update\_driver** (*config\_name, action, contents*)

```
platform_driver.agent.main (argv=['/home/docs/checkouts/readthedocs.org/user_builds/voltron/envs/releases-
8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D',
'language=en', '-d', '_build/doctrees', '.', '_build/latex'])
```

Main method called to start the agent.

```
platform_driver.agent.platform_driver_agent (config_path, **kwargs)
```

## platform\_driver.driver module

```
class platform_driver.driver.DriverAgent (parent, config, time_slot, driver_scrape_interval,
device_path, group, group_offset_interval,
default_publish_depth_first_all=True, de-
fault_publish_breadth_first_all=True,
default_publish_depth_first=True, de-
fault_publish_breadth_first=True, **kwargs)
```

Bases: voltron.platform.vip.agent.BasicAgent

**find\_starting\_datetime** (*now*)

**get\_interface** (*driver\_type, config\_dict, config\_string*)  
Returns an instance of the interface

**get\_multiple\_points** (*point\_names, \*\*kwargs*)

**get\_paths\_for\_point** (*point*)

**get\_point** (*point\_name, \*\*kwargs*)

**heart\_beat** ()

**periodic\_read** (*now*)

**publish\_cov\_value** (*point\_name, point\_values*)

Called in the platform driver agent to publish a cov from a point :param point\_name: point which sent COV notifications :param point\_values: COV point values

**revert\_all** (*\*\*kwargs*)

**revert\_point** (*point\_name, \*\*kwargs*)

**scrape\_all** ()

```
set_multiple_points (point_names_values, **kwargs)  
set_point (point_name, value, **kwargs)  
setup_device ()  
starting (sender, **kwargs)  
update_publish_types (publish_depth_first_all, publish_breadth_first_all, publish_depth_first,  
                        publish_breadth_first)  
    Setup which publish types happen for a scrape. Values passed in are overridden by settings in the specific  
    device configuration.  
update_scrape_schedule (time_slot, driver_scrape_interval, group, group_offset_interval)
```

### platform\_driver.driver\_exceptions module

```
exception platform_driver.driver_exceptions.DriverConfigError  
    Bases: platform_driver.driver_exceptions.DriverError  
exception platform_driver.driver_exceptions.DriverError  
    Bases: Exception
```

### platform\_driver.driver\_locks module

```
platform_driver.driver_locks.configure_publish_lock (max_connections=0)  
platform_driver.driver_locks.configure_socket_lock (max_connections=0)  
platform_driver.driver_locks.publish_lock ()  
platform_driver.driver_locks.socket_lock ()
```

## 2.41.2 Platform Driver Agent

The Platform Driver agent is a special purpose agent a user can install on the platform to manage communication of the platform with devices. The Platform driver features a number of endpoints for collecting data and sending control signals using the message bus and automatically publishes data to the bus on a specified interval.

### Dependencies

VOLTTRON drivers operated by the platform driver may have additional requirements for installation. Required libraries:

1. BACnet driver - bacpypes
2. Modbus driver - pymodbus
3. Modbus\_TK driver - modbus-tk
4. DNP3 and IEEE 2030.5 drivers - pydnp3

The easiest way to install the requirements for drivers included in the VOLTTRON repository is to use bootstrap.py

```
python3 bootstrap.py --drivers
```

## Configuration

### Agent Configuration

The Platform Driver Agent configuration consists of general settings for all devices. The default values of the Platform Driver should be sufficient for most users. The user may optionally change the interval between device scrapes with the `driver_scrape_interval`.

The following example sets the `driver_scrape_interval` to 0.05 seconds or 20 devices per second:

```
{
  "driver_scrape_interval": 0.05,
  "publish_breadth_first_all": false,
  "publish_depth_first": false,
  "publish_breadth_first": false,
  "publish_depth_first_all": true,
  "group_offset_interval": 0.0
}
```

1. `driver_scrape_interval` - Sets the interval between devices scrapes. Defaults to 0.02 or 50 devices per second. Useful for when the platform scrapes too many devices at once resulting in failed scrapes.
2. `group_offset_interval` - Sets the interval between when groups of devices are scraped. Has no effect if all devices are in the same group. In order to improve the scalability of the platform unneeded device state publishes for all devices can be turned off. All of the following setting are optional and default to True.
3. `publish_depth_first_all` - Enable “depth first” publish of all points to a single topic for all devices.
4. `publish_breadth_first_all` - Enable “breadth first” publish of all points to a single topic for all devices.
5. `publish_depth_first` - Enable “depth first” device state publishes for each register on the device for all devices.
6. `publish_breadth_first` - Enable “breadth first” device state publishes for each register on the device for all devices.

### Driver Configuration

Each device configuration has the following form:

```
{
  "driver_config": {"device_address": "10.1.1.5",
                    "device_id": 500},
  "driver_type": "bacnet",
  "registry_config": "config://registry_configs/vav.csv",
  "interval": 60,
  "heart_beat_point": "heartbeat",
  "group": 0
}
```

The following settings are required for all device configurations:

1. `driver_config` - Driver specific setting go here. See below for driver specific settings.
2. `driver_type` - Type of driver to use for this device: bacnet, modbus, fake, etc.
3. `registry_config` - Reference to a configuration file in the configuration store for registers on the device.

These settings are optional:

1. `interval` - Period which to scrape the device and publish the results in seconds. Defaults to 60 seconds.

2. `heart_beat_point` - A Point which to toggle to indicate a heartbeat to the device. A point with this Volttron Point Name must exist in the registry. If this setting is missing the driver will not send a heart beat signal to the device. Heart beats are triggered by the Actuator Agent which must be running to use this feature.
3. `group` - Group this device belongs to. Defaults to 0

## 2.42 SQLAggregateHistorian

### 2.42.1 sqlaggregator package

#### sqlaggregator.aggregator module

**class** `sqlaggregator.aggregator.SQLAggregateHistorian` (*config\_path*, *\*\*kwargs*)

Bases: `volttron.platform.agent.base_aggregate_historian.AggregateHistorian`

Agent to aggregate data in historian based on a specific time period. This aggregate historian aggregates data collected by SQLHistorian.

**collect\_aggregate** (*topic\_ids*, *agg\_type*, *start\_time*, *end\_time*)

Collect the aggregate data by querying the historian's data store

**Parameters**

- **topic\_ids** – list of topic ids for which aggregation should be performed.
- **agg\_type** – type of aggregation
- **start\_time** – start time for query (inclusive)
- **end\_time** – end time for query (exclusive)

**Returns** a tuple of (aggregated value, count of record over which this aggregation was computed)

**configure** (*config\_name*, *action*, *config*)

Converts aggregation time period into seconds, validates configuration values and calls the collect aggregate method for the first time

**Parameters**

- **config\_name** – name of the config entry in store. We only use one config store entry with the default name config
- **action** – “NEW or “UPDATE” code treats both the same way
- **config** – configuration as json object

**get\_agg\_topic\_map** ()

Query the aggregate\_topics table and create a map of (topic name, aggregation type, aggregation time period) to topic id. This should be done as part of init

**Returns** Returns a list of topic\_map containing

```
{(agg_topic_name.lower(), agg_type, agg_time_period) :id}
```

**get\_aggregation\_list** ()

Returns a list of supported aggregations

**Returns** list of supported aggregations

**get\_topic\_map** ()

Query the topics table and create a map of topic name to topic id. This should be done as part of init

**Returns** Returns a list of topic\_map containing {topic\_name.lower():id}

**initialize\_aggregate\_store** (*aggregation\_topic\_name*, *agg\_type*, *agg\_time\_period*, *topics\_meta*)

Create the data structure (table or collection) that is going to store the aggregate data for the give aggregation type and aggregation time period

**Parameters**

- **aggregation\_topic\_name** – Unique topic name for this aggregation. If aggregation is done over multiple points it is a unique name given by user, else it is same as topic\_name for which aggregation is done
- **agg\_type** – The type of aggregation. For example, avg, sum etc.
- **agg\_time\_period** – The time period of aggregation
- **topics\_meta** – String that represents the list of topics across which this aggregation is computed. It could be topic name pattern or list of topics. This information should go into metadata table

**Returns** Return a aggregation\_topic\_id after inserting aggregation\_topic\_name into topics table

**insert\_aggregate** (*topic\_id, agg\_type, period, end\_time, value, topic\_ids*)

Insert aggregate data collected for a specific time period into database. Data is inserted into <agg\_type>\_<period> table

**Parameters**

- **agg\_topic\_id** – If len(topic\_ids) is 1. This would be the same as the topic\_ids[0]. Else this id corresponds to the unique topic name given by user for this aggregation across multiple points.
- **agg\_type** – type of aggregation
- **agg\_time\_period** – The time period of aggregation
- **end\_time** – end time used for query records that got aggregated
- **topic\_ids** – topic ids for which aggregation was computed
- **value** – aggregation result

**update\_aggregate\_metadata** (*agg\_id, aggregation\_topic\_name, topic\_meta*)

Update aggregation\_topic\_name and topic\_meta data for the given agg\_id.

**Parameters**

- **agg\_id** – Aggregation topic id for which update should be done
- **aggregation\_topic\_name** – New aggregation\_topic\_name
- **topic\_meta** – new topic metadata

```
sqlagggregator.agggregator.main (argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', '-', '_build/latex'])
```

Main method called by the eggsecutable.

## 2.42.2 SQL Aggregate Historian

An aggregate historian computes aggregates of data stored in a given volttron historian's data store. It runs periodically to compute aggregate data and store it in new tables/collections in the historian's data store. Each historian implementation would use a corresponding aggregate historian to compute and store aggregates.

Aggregates can be defined for a specific time interval and can be calculated for one or more topics. For example, 15 minute average of topic1 or 15 minute average of values of topic1 and topic2. Current version of this agent only computes aggregates supported by underlying data store. When aggregation is done over more than one topic a unique aggregation topic name should be configured by user. This topic name can be used in historian's query api to query the collected aggregate data.

Note: This agent doesn't not compute dynamic aggregates. It is only useful when you know what kind of aggregate you would need before hand and have them be collected periodically so that retrieval of that data at a later point would be faster

## Data flow between historian and aggregate historian

1. Historian collects data from devices and stores it in its data store
2. Aggregate historian periodically queries historian's data store for data within configured time period.
3. Aggregate historian computes aggregates and stores it in historian's data store
4. Historian's query api queries aggregate data when used with additional parameters - agg\_type, agg\_period

## Configuration

```
{
  # configuration from mysql historian - START
  "connection": {
    "type": "mysql",
    "params": {
      "host": "localhost",
      "port": 3306,
      "database": "test_historian",
      "user": "historian",
      "passwd": "historian"
    }
  },
  # configuration from mysql historian - END
  # If you are using a differnt historian(sqlite3, mongo etc.) replace the
  # above with connection details from the corresponding historian.
  # the rest of the configuration would be the same for all aggregate
  # historians

  "aggregations": [
    # list of aggregation groups each with unique aggregation_period and
    # list of points that needs to be collected. value of "aggregations" is
    # a list. you can configure this agent to collect multiple aggregates.
    # aggregation_time_period + aggregation topic(s) together uniquely
    # identify an aggregation

    {
      # can be minutes(m), hours(h), weeks(w), or months(M)

      "aggregation_period": "1m",

      # Should aggregation period align to calendar time periods.
      # Default False
      # Example,
      # if "aggregation_period": "1h" and "use_calendar_time_periods": False
      # example periods: 10.15-11.15, 11.15-12.15, 12.15-13.15 etc.
      # if "aggregation_period": "1h" and "use_calendar_time_periods": True
      # example periods: 10.00-11.00, 11.00-12.00, 12.00-13.00 etc.

      "use_calendar_time_periods": "true",

      # topics to be aggregated

      "points": [
        {
          # here since aggregation is done over a single topic name
```

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```

        # same topic name is used for the aggregation topic
        "topic_names": ["device1/out_temp"],
        "aggregation_type": "sum",
        #minimum required records in the aggregation time period for
→aggregate to be recorded
        "min_count": 2
    },
    {
        "topic_names": ["device1/in_temp"],
        "aggregation_type": "sum",
        "min_count": 2
    }
]
},
{
    "aggregation_period": "2m",
    "use_calendar_time_periods": "false",
    "points": [
        {
            # aggregation over more than one topic so aggregation_topic_name
→should be specified
            "topic_names": ["Building/device/point1", "Building/device/point2"],
            "aggregation_topic_name": "building/device/point1_2/month_sum",
            "aggregation_type": "avg",
            "min_count": 2
        }
    ]
}
]
}
}

```

## See Also

[AggregateHistorianSpec](#)

## 2.43 SQLHistorian

### 2.43.1 sqlhistorian package

#### sqlhistorian.historian module

**class** sqlhistorian.historian.MaskedString

Bases: str

**class** sqlhistorian.historian.SQLHistorian (connection, tables\_def=None, \*\*kwargs)

Bases: voltron.platform.agent.base\_historian.BaseHistorian

This is a historian agent that writes data to a SQLite or Mysql database based on the connection parameters in the configuration. .. seealso:

```

- :py:mod:`voltron.platform.dbutils.basedb`
- :py:mod:`voltron.platform.dbutils.mysqlfuncts`
- :py:mod:`voltron.platform.dbutils.sqlitefuncts`

```

**get\_dbfuncts\_object()**

**historian\_setup()**

Optional setup routine, run in the processing thread before main processing loop starts. Gives the Historian a chance to setup connections in the publishing thread.

**manage\_db\_size** (*history\_limit\_timestamp*, *storage\_limit\_gb*)

Optional function to manage database size.

**publish\_to\_historian** (*to\_publish\_list*)

Main publishing method for historian Agents.

**Parameters to\_publish\_list** (*list*) – List of records

*to\_publish\_list* takes the following form:

```
[
  {
    'timestamp': timestamp1.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isbl/hvac1/thermostat",
    'value': 73.0,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  {
    'timestamp': timestamp2.replace(tzinfo=pytz.UTC),
    'source': 'scrape',
    'topic': "pnnl/isbl/hvac1/temperature",
    'value': 74.1,
    'meta': {"units": "F", "tz": "UTC", "type": "float"}
  },
  ...
]
```

The contents of *meta* is not consistent. The keys in the meta data values can be different and can change along with the values of the meta data. It is safe to assume that the most recent value of the “meta” dictionary are the only values that are relevant. This is the way the cache treats meta data.

Once one or more records are published either `BaseHistorianAgent.report_all_handled()` or `BaseHistorianAgent.report_handled()` must be called to report records as being published.

**query\_aggregate\_topics()**

This function is called by `BaseQueryHistorianAgent.get_aggregate_topics()` to find out the available aggregates in the data store

**Returns** List of tuples containing (topic\_name, aggregation\_type, aggregation\_time\_period, metadata)

**Return type** list

**query\_historian** (*topic*, *start=None*, *end=None*, *agg\_type=None*, *agg\_period=None*, *skip=0*, *count=None*, *order='FIRST\_TO\_LAST'*)

This function is called by `BaseQueryHistorianAgent.query()` to actually query the data store and must return the results of a query in the following format:

**Single topic query:**

```
{
  "values": [(timestamp1, value1),
             (timestamp2, value2),
             ...],
  "metadata": {"key1": value1,
```

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```

        "key2": value2,
        ...}
    }

```

**Multiple topics query:**

```

{
  "values": {topic_name: [(timestamp1, value1),
                        (timestamp2, value2),
                        ...],
            topic_name: [(timestamp1, value1),
                        (timestamp2, value2),
                        ...],
            ...}
  "metadata": {} #empty metadata
}

```

Timestamps must be strings formatted by `volttron.platform.agent.utils.format_timestamp()`.

“metadata” is not required. The caller will normalize this to `{}` for you if it is missing.

**Parameters**

- **topic** (*str* or *list*) – Topic or list of topics to query for.
- **start** (*datetime*) – Start of query timestamp as a datetime.
- **end** (*datetime*) – End of query timestamp as a datetime.
- **agg\_type** – If this is a query for aggregate data, the type of aggregation ( for example, sum, avg)
- **agg\_period** – If this is a query for aggregate data, the time period of aggregation
- **skip** (*int*) – Skip this number of results.
- **count** (*int*) – Limit results to this value. When the query is for multiple topics, count applies to individual topics. For example, a query on 2 topics with count=5 will return 5 records for each topic
- **order** (*str*) – How to order the results, either “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns** Results of the query

**Return type** *dict*

**query\_topic\_list()**

This function is called by `BaseQueryHistorianAgent.get_topic_list()` to actually topic list from the data store.

**Returns** List of topics in the data store.

**Return type** *list*

**query\_topics\_by\_pattern(topic\_pattern)**

Find the list of topics and its id for a given topic\_pattern

**Returns** returns list of dictionary object {topic\_name:id}

**query\_topics\_metadata(topics)**

This function is called by `BaseQueryHistorianAgent.get_topics_metadata()` to find out the metadata for the given topics

**Parameters** **topics** (*str* or *list*) – single topic or list of topics

**Returns** dictionary with the format

```

{topic_name: {metadata_key:metadata_value, ...},
 topic_name: {metadata_key:metadata_value, ...} ...}

```

**Return type** dict

**version()**

Return the current version number of the historian :return: version number

`sqlhistorian.historian.historian(config_path, **kwargs)`

This method is called by the `sqlhistorian.historian.main()` to parse the passed config file or configuration dictionary object, validate the configuration entries, and create an instance of SQLHistorian :param config\_path: could be a path to a configuration file or can be a dictionary object

**Parameters** **kwargs** – additional keyword arguments if any

**Returns** an instance of `sqlhistorian.historian.SQLHistorian`

`sqlhistorian.historian.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', '-', '_build/latex'])`

Main entry point for the agent.

## 2.43.2 SQLHistorian

This is a historian agent that writes data to a SQLite, Mysql, Postgres, TimeScale, or Redshift database based on the connection parameters in the configuration. The sql historian has been programmed to allow for inconsistent network connectivity (automatic re-connection to tcp based databases). All additions to the historian are batched and wrapped within a transaction with commit and rollback functions properly implemented. This allows the maximum throughput of data with the most protection

### Common Configurations

All SQLHistorians support two parameters

1. **connection** - This is a mandatory parameter with type indicating the type of sql historian (ex. mysql, sqlite, etc.) and params containing the connection parameters specific to the connecting database type.
2. **tables\_def** - Optional parameter to provide custom table names for topics, data, and metadata. This is useful when you want to use more than one instance of sqlhistorian with the same database

Example:

JSON format :

```
{
  "connection": {
    # type should be sqlite
    "type": "sqlite",
    "params": {
      "database": "data/historian.sqlite",
    }
  }
  "tables_def": {
    # prefix for data, topics, and (in version < 4.0.0 metadata tables)
    # default is ""
    "table_prefix": "",
    # table name for time series data. default "data"
    "data_table": "data",
    # table name for list of topics. default "topics"
    "topics_table": "topics",
```

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```

# table name mapping topic to metadata. default "meta"
# In sqlhistorian version >= 4.0.0 metadata is stored in topics table
"meta_table": "meta"
}
}

```

## MySQL

### Installation notes

1. In order to support timestamp with microseconds you need at least MySQL 5.6.4. Please see this [MySQL documentation](#) for more details
2. The mysql user must have SELECT INSERT, and DELETE privileges to the historian database tables.
3. SQLHistorianAgent can create the database tables the first time it runs if the database user has CREATE privileges. But we recommend this only for development/test environments. For all other use cases, use the mysql-create\*.sql script to create the tables and then start agent. This way database user used by VOLTRON historian can work with minimum required privileges

### Dependencies

In order to use mysql one must install the **mysql-python connector**

From an activated shell execute

```
pip install mysql-connector-python-rf
```

On Ubuntu 16.04

pip install does not work. Please download the connector from <https://launchpad.net/ubuntu/xenial/+package/python-mysql.connector> and follow instructions on README

### Configuration

The following is a minimal configuration file for using a MySQL based historian. Other options are available and are documented <http://dev.mysql.com/doc/connector-python/en/connector-python-connectargs.html>. **Not all mysql connection parameters have been tested, use at your own risk.** The configurations can be provided in JSON format or yaml format

JSON format :

```

{
  "connection": {
    # type should be "mysql"
    "type": "mysql",
    # additional mysql connection parameters could be added but
    # have not been tested
    "params": {
      "host": "localhost",
      "port": 3306,
      "database": "volttron",
      "user": "user",

```

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```
        "passwd": "pass"
    }
}
```

YML format :

```
connection:
  type: mysql
  params:
    host: localhost
    port: 3306
    database: test_historian
    user: historian
    passwd: historian
```

## SQLite3

An Sqlite historian provides a convenient solution for under powered systems. The database parameter is a location on the file system. By default it is relative to the agents installation directory, however it will respect a rooted or relative path to the database.

## Configuration

```
{
  "connection": {
    # type should be sqlite
    "type": "sqlite",
    "params": {
      "database": "data/historian.sqlite",
    }
  }
}
```

## PostgreSQL and Redshift

### Installation notes

1. The PostgreSQL database driver supports recent PostgreSQL versions. It was tested on 10.x, but should work with 9.x and 11.x.
2. The user must have SELECT, INSERT, and UPDATE privileges on historian tables.
3. The tables in the database are created as part of the execution of the SQLHistorianAgent, but this will fail if the database user does not have CREATE privileges.
4. Care must be exercised when using multiple historians with the same database. This configuration may be used only if there is no overlap in the topics handled by each instance. Otherwise, duplicate topic IDs may be created, producing strange results.
5. Redshift databases do not support unique constraints. Therefore, it is possible that tables may contain some duplicate data. The Redshift driver handles this by using distinct queries. It does not remove duplicates from the tables.

## Dependencies

The PostgreSQL and Redshift database drivers require the **psycopg2** Python package.

From an activated shell execute:

```
pip install psycopg2-binary
```

## Configuration

The following are minimal configuration files for using a psycopg2-based historian. Other options are available and are documented <http://initd.org/psycopg/docs/module.html> **Not all parameters have been tested, use at your own risk.**

### Local PostgreSQL Database

The following snippet demonstrates how to configure the SQLHistorianAgent to use a PostgreSQL database on the local system that is configured to use Unix domain sockets. The user executing volttron must have appropriate privileges.

```
{
    "connection": {
        "type": "postgresql",
        "params": { "dbname": "volttron" }
    }
}
```

#### Remote PostgreSQL Database

The following snippet demonstrates how to configure the SQLHistorianAgent to use a remote PostgreSQL database.

```
{
    "connection": {
        "type": "postgresql",
        "params": {
            "dbname": "volttron",
            "host": "historian.example.com",
            "port": 5432,
            "user": "volttron",
            "password": "secret" }
    }
}
```

## TimescaleDB Support

Both of the above PostgreSQL connection types can make use of TimescaleDB's high performance Hypertable backend for the primary timeseries table. The agent assumes you have completed the TimescaleDB installation and setup the database by following the instructions here: <https://docs.timescale.com/latest/getting-started/setup> To use, simply add 'timescale\_dialect: true' to the connection params in the Agent Config as below

```
{
  "connection": {
    "type": "postgresql",
    "params": {
      "dbname": "volttron",
      "host": "historian.example.com",
      "port": 5432,
      "user": "volttron",
      "password": "secret" ,
      "timescale_dialect": true }
  }
}
```

## Redshift Database

The following snippet demonstrates how to configure the SQLHistorianAgent to use a Redshift database.

```
{
  "connection": {
    "type": "redshift",
    "params": {
      "dbname": "volttron",
      "host": "historian.example.com",
      "port": 5432,
      "user": "volttron",
      "password": "secret" }
  }
}
```

## Notes

Do not use the "identity" setting in configuration file. Instead use the new method provided by the platform to set an agent's identity. See scripts/core/make-sqlite-historian.sh for an example of how this is done. Setting a historian's VIP IDENTITY from its configuration file will not be supported after VOLTTRON 4.0. Using the identity configuration setting will override the value provided by the platform. This new value will not be reported correctly by 'volttron-ctl status'



## 2.44 SQLiteTaggingService

### 2.44.1 sqlite package

#### sqlite.tagging module

**class** `sqlite.tagging.SQLiteTaggingService` (*connection, table\_prefix=None, \*\*kwargs*)

Bases: `volttron.platform.agent.base_tagging.BaseTaggingService`

This is a tagging service agent that writes data to a SQLite database.

**insert\_topic\_tags** (*tags, update\_version=False*)

Add tags to multiple topics.

#### Parameters

- **tags** (*dict*) – dictionary object or file containing the topic and the tag details. dictionary object or the file content should be of the format:

```
<topic_name or prefix or topic_name pattern>: {<valid
tag>:<value>, ... }, ... }
```

- **update\_version** (*bool*) – True/False. Default to False. If set to True and if any of the tags update an existing tag value the older value would be preserved as part of tag version history. Note: this feature is not implemented in the current version of sqlite and mongodb tagging service.

**load\_tag\_refs** ()

Called right after setup to load a dictionary of reference tags and its corresponding parent tag. Implementing methods should load `self.tag_refs` with tag and parent tag information

**load\_valid\_tags** ()

Called right after setup to load a dictionary of valid tags. It should load `self.valid_tags` with tag and type information

**query\_categories** (*include\_description=False, skip=0, count=None, order='FIRST\_TO\_LAST'*)

Get the available list tag categories. category can have multiple tags and tags could belong to multiple categories

#### Parameters

- **include\_description** (*bool*) – indicate if result should include available description for categories returned
- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns** list of category names if `include_description` is False, list of (category name, description) if `include_description` is True

**Return type** `list`

**query\_tags\_by\_category** (*category, include\_kind=False, include\_description=False, skip=0, count=None, order='FIRST\_TO\_LAST'*)

Get the list of tags for a given category name. category can have multiple tags and tags could belong to multiple categories

#### Parameters

- **category** (*str*) – name of the category for which associated tags should be returned
- **include\_kind** (*bool*) – indicate if result should include the kind/datatype for tags returned
- **include\_description** (*bool*) – indicate if result should include available description for tags returned

- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

#### Returns

Will return one of the following

- list of tag names
- list of (tags, its data type/kind) if include\_kind is True
- list of (tags, description) if include\_description is True
- list of (tags, its data type/kind, description) if include\_kind is True and include\_description is true

**Return type** *list*

**query\_tags\_by\_topic** (*topic\_prefix*, *include\_kind=False*, *include\_description=False*, *skip=0*, *count=None*, *order='FIRST\_TO\_LAST'*)

Get the list of tags for a given topic prefix or name.

#### Parameters

- **topic\_prefix** (*str*) – topic\_prefix for which associated tags should be returned
- **include\_kind** (*bool*) – indicate if result should include the kind/datatype for tags returned
- **include\_description** (*bool*) – indicate if result should include available description for tags returned
- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

#### Returns

Will return one of the following

- list of (tag name, value)
- list of (tag name, value, data type/kind) if include\_kind is True
- list of (tag name, value, description) if include\_description is True
- list of (tags, value, data type/kind, description) if include\_kind is True and include\_description is true

**Return type** *list*

**query\_topics\_by\_tags** (*ast*, *skip=0*, *count=None*, *order=None*)

Get list of topic names and topic name prefixes based on query condition. Query condition is passed as an abstract syntax tree.

#### Parameters

- **ast** (*tuple*) – Abstract syntax tree that represents conditional statement to be used for matching tags. The abstract syntax tree represents query condition that is created using the following specification

Query condition is a boolean expression that contains one or more query conditions combined together with an “AND” or “OR”. Query conditions can be grouped together using parenthesis. Each condition in the expression should conform to one of the following format:

1. <tag name/ parent.tag\_name> <binary\_operator> <value>
2. <tag name/ parent.tag\_name>
3. <tag name/ parent.tag\_name> LIKE <regular expression within single quotes>
4. the word NOT can be prefixed before any of the above three to negate the condition.
5. expressions can be grouped with parenthesis. For example

```
condition="(tag1 = 1 or tag1 = 2) and (tag2 < ' and_
↪tag2 >
') and tag3 and (tag4 LIKE '^a.*b$') "
condition="NOT (tag5='US' OR tag5='UK') AND NOT tag3_
↪AND
NOT (tag4 LIKE 'a.*') "
condition="campusRef.geoPostalCode='20500' and equip_
↪and
boiler"
```

- **skip** (*int*) – number of tags to skip. usually used with order
- **count** (*int*) – limit on the number of tags to return
- **order** (*str*) – order of result - “FIRST\_TO\_LAST” or “LAST\_TO\_FIRST”

**Returns** list of topics/topic\_prefix that match the given query conditions

**Return type** list

#### **setup()**

Called on start of agent Method to establish database connection, do any initial bootstrap necessary.

Example - load master list of tags, units, categories etc. into data store/memory

```
sqlite.tagging.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-
8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'lan-
guage=en', '-d', '_build/doctrees', '-', '_build/latex'])
```

Main entry point for the agent.

**Parameters** *argv* –

**Returns**

```
sqlite.tagging.tagging_service(config_path, **kwargs)
```

This method is called by the `service.tagging.main()` to parse the passed config file or configuration dictionary object, validate the configuration entries, and create an instance of `SQLTaggingService`

**Parameters**

- **config\_path** – could be a path to a configuration file or can be a dictionary object
- **kwargs** – additional keyword arguments if any

**Returns** an instance of `service.tagging.SQLTaggingService`

## 2.44.2 SQLite Tagging Service

SQLite tagging service provide APIs to tag both topic names(device points) and topic name prefixes (campus, building, unit/equipment, sub unit) and then query for relevant topics based on saved tag names and values. The SQLite tagging services stores the tags in a sqlite3 database and hence provides a way to use this feature in VOLTTRON out of the box.

Tags used by this agent are not user defined. They have to be pre-defined in a resource file at `volttron_data/tagging_resources`. The agent validates against this predefined list of tags every time user add tags to topics. Tags can be added to one topic at a time or multiple topics by using a topic name pattern(regular expression). This agent uses tags from [project haystack](#). and adds a few custom tags for campus and VOLTTRON point name.

Each tag has an associated value and users can query for topic names based tags and its values using a simplified sql-like query string. Queries can specify tag names with values or tags without values for boolean tags(markers). Queries can combine multiple conditions with keyword AND and OR, and use the keyword NOT to negate a conditions.

## Dependencies and Limitations

1. When adding tags to topics this agent calls the platform.historian's `get_topic_list` and hence requires the platform.historian to be running but it doesn't require the historian to use sqlite or any specific database. It does not require platform.historian to be running for using its query APIs.
2. Resource files that provides the list of valid tags is mandatory and should be in `volttron_data/tagging_reosources/tags.csv`
3. Tagging service only provides APIs query for topic names based on tags. Once the list of topic names is retrieved, users should use the historian APIs to get the data corresponding to those topics.
4. Since RDMS is not a natural fit for `tagname=value` kind of data, performance of queries will not be high if you have several thousands of topics and several hundreds tags for each topic and perform complex queries. For intermediate level data and query complexity, performance can be improved by increasing the page limit of sqlite.
5. Current version of tagging service does not support versioning of tag/values. When tags values set using tagging service APIs update/overwrite any existing tag entries in the database

## Configuration Options

The following JSON configuration file shows all the options currently supported by this agent.

```
{
  # sqlite connection parameters
  "connection": {
    "type": "sqlite",
    "params": {
      "database": "~/volttron/data/volttron.tags.sqlite"
    }
  },
  # optional. Specify if collections created for tagging should have names
  # starting with a specific prefix <given prefix>_<collection_name>
  "table_prefix": "volttron",

  # optional. Specify if you want tagging service to query the historian
  # with this vip identity. defaults to platform.historian
  "historian_vip_identity": "crate.historian"
}
```

## See Also

[TaggingServiceSpec](#)

## 2.45 VolttronCentral

### 2.45.1 rpc\_test\_client module

```

rpc_test_client.do_rpc (method, params=None)
rpc_test_client.exec_method (platform_uuid, agent_uuid, method, params)
rpc_test_client.get_dict (text)
rpc_test_client.inspect_agent (platform_uuid, agent_uuid)
rpc_test_client.inspect_method (platform_uuid, agent_uuid, method)
rpc_test_client.list_agents (platform_uuid)
rpc_test_client.register_instance (discovery_address)
rpc_test_client.register_platform (address, identity)

```

### 2.45.2 volttroncentral package

#### volttroncentral.agent module

The VolttronCentral(VCA) agent is used to manage remote VOLTTRON instances. The VCA exposes a JSON-RPC based web api and a web enabled visualization framework. The web enabled framework is known as VOLTTRON Central Management Console (VCMC).

In order for an instance to be able to be managed by VCMC a `vcplatform.agent.VolttronCentralPlatform` must be executing on the instance. If there is a `vcplatform.agent.VolttronCentralPlatform` running on the same instance as VCA it will be automatically registered as a managed instance. Otherwise, there are two different paths to registering an instance with VCA.

1. Through the web api a call to the JSON-RPC method `register_instance`.
2. From an external platform through pub/sub. this secondary method is preferred when deploying instances in the field that need to “phone home” to VCA after being deployed.

```

class volttroncentral.agent.Platform (instance_name, serverkey, vip_address)
    Bases: tuple
        property instance_name
            Alias for field number 0
        property serverkey
            Alias for field number 1
        property vip_address
            Alias for field number 2
class volttroncentral.agent.RequiredArgs (id, session_user, platform_uuid)
    Bases: tuple
        property id
            Alias for field number 0

```

**property platform\_uuid**

Alias for field number 2

**property session\_user**

Alias for field number 1

**class** volttroncentral.agent.VolttronCentralAgent (*webroot='/home/docs/checkouts/readthedocs.org/user\_builds/volttron/8.2/services/core/VolttronCentral/volttroncentral/webroot',*  
*users={}, topic\_replace\_list=[],*  
*\*\*kwargs*)

Bases: volttron.platform.vip.agent.Agent

Agent for managing many volttron instances from a central web ui.

During the

**configure\_platforms** (*config\_name, action, contents*)

**get\_publickey** ()

RPC method allowing the caller to retrieve the publickey of this agent.

This method is available for allowing VolttronCentralPlatform agents to allow this agent to be able to connect to its instance.

**Returns** The publickey of this volttron central agent.

**Return type** `str`

**get\_setting** (*session\_user, params*)

Retrieve a value from the passed setting key. The params object must contain a “key” to return from the settings store.

**Parameters**

- **session\_user** – Unused
- **params** – Dictionary that must contain a ‘key’ key.

**Returns** The value or a jsonrpc error object.

**get\_setting\_keys** (*session\_user, params*)

Returns a list of all of the settings keys so the caller can know what settings to request.

**Parameters**

- **session\_user** – Unused
- **params** – Unused

**Returns** A list of settings available to the caller.

**is\_registered** (*address\_hash=None, address=None*)

**jsonrpc** (*env: dict, data: dict*)

The main entry point for ^jsonrpc data

This method will only accept rpcdata. The first time this method is called, per session, it must be using get\_authorization. That will return a session token that must be included in every subsequent request. The session is tied to the ip address of the caller.

**Parameters**

- **env** (*object*) – Environment dictionary for the request.
- **data** (*object*) – The JSON-RPC 2.0 method to call.

**Return object** An JSON-RPC 2.0 response.

**open\_authenticate\_ws\_endpoint** (*fromip, endpoint*)

Callback method from when websockets are opened. The endpoint must be ‘/’ delimited with the second to last section being the session of a logged in user to volttron central itself.

**Parameters**

- **fromip** –
- **endpoint** – A string representing the endpoint of the websocket.

**Returns**

**send\_management\_message** (*type*, *data*={})

Send a message to any socket that has connected to the management socket.

The payload sent to the client is like the following:

```
{
  "type": "UPDATE_DEVICE_STATUS",
  "data": "this is data that was passed"
}
```

#### Parameters

- **type** (*str*) – A string defining a unique type for sending to the websockets.
- **data** (*serializable*) – An object that str can be called on.

**set\_setting** (*session\_user*, *params*)

Sets or removes a setting from the config store. If the value is None then the item will be removed from the store. If there is an error in saving the value then a `jsonrpc.json_error` object is returned.

#### Parameters

- **session\_user** – Unused
- **params** – Dictionary that must contain ‘key’ and ‘value’ keys.

**Returns** A ‘SUCCESS’ string or a `jsonrpc.json_error` object.

`volttroncentral.agent.init_volttron_central` (*config\_path*, *\*\*kwargs*)

`volttroncentral.agent.main` (*argv*=['/home/docs/checkouts/readthedocs.org/user\_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/\_\_main\_\_.py', '-b', 'latex', '-D', 'language=en', '-d', '\_build/doctrees', '-', '\_build/latex'])

Main method called by the eggsecutable.

**Parameters** *argv* –

**Returns**

## volttroncentral.authenticate module

A simple authorization for authenticating users with known credentials.

@author: Craig Allwardt

**class** `volttroncentral.authenticate.Authenticate` (*user\_map*)

Bases: `object`

**authenticate** (*username*, *password*)

Authenticate that the user is known to the system.

Return groups of the user if the user is known otherwise returns None. :param username: :param password: :return: list(groups) or None

## volttroncentral.platforms module

**class** `volttroncentral.platforms.PlatformHandler` (*vc*, *vip\_identity*)

Bases: `object`

This class is a wrapper around the communication between VC and a corresponding VCP on either this instance or another instance.

**add\_event\_listener** (*callback*)

**property** *address*

**static address\_hasher** (*address*)

Hashes the passed address.

**Parameters** *address* –

**Returns**

**call** (*platform\_method*, *\*args*, *\*\*kwargs*)

Calls a method on a vcp platform.

**Parameters**

- **platform\_method** –
- **args** –
- **kwargs** –

**Returns**

**property config\_store\_name**

Each platform has a specific entry for its data. In order to get that entry the config store needs a config name. This property returns the config store name for this platform.

**Returns** config store name

**Return type** `str`

**delete\_agent\_config** (*session\_user*, *params*)

**property display\_name**

**get\_agent\_config** (*session\_user*, *params*)

**get\_agent\_config\_list** (*session\_user*, *params*)

**get\_agent\_list** (*session\_user*, *params*)

**get\_devices** (*session\_user*, *params*)

**get\_stats** (*stat\_type*)

**property health**

Returns a Status object as a dictionary. This will be populated by the heartbeat from the external instance that this object is monitoring, unless it has been over 10 seconds since the instance has been reached. In that case the health will be BAD.

**Returns**

**property platforms**

Returns a link to the object that created this handler.

**Returns**

**route\_to\_agent\_method** (*id*, *agent\_method*, *params*)

**status\_agents** (*session\_user*, *params*)

**store\_agent\_config** (*session\_user*, *params*)

**property vip\_identity**

**class** `volttroncentral.platforms.Platforms` (*vc*)

Bases: `object`

A class to manage the connections and interactions with external instances.

**add\_platform** (*vip\_identity*)

Add a platform based upon the vip\_identity to the “known list” of platforms.

**Parameters** *vip\_identity* –

**Returns**

**disconnect\_platform** (*vip\_identity*)

Remove a platform based upon vip\_identity from the “known list” of platforms.



**Parameters** `vip_identity` –  
**Returns**

**get\_performance\_list** (*session\_user*, *params*)

Retrieve a list of all of the platforms stats available.

This function returns a list of platform status such as the following:

```
[
  {
    "topic": "datalogger/platforms/f6e675fb36989f97c3b0f25227aaf02e/
→status/cpu",
    "last_published_utc": "2017-01-12T18:58:47.894296+00:00",
    "points":
      [
        "times_percent/guest_nice",
        "times_percent/system",
        "percent",
        "times_percent/irq",
        "times_percent/steal",
        "times_percent/user",
        "times_percent/nice",
        "times_percent/iowait",
        "times_percent/idle",
        "times_percent/guest",
        "times_percent/softirq"
      ]
  },
  ...
]
```

**Parameters**

- **session\_user** –
- **params** –

**Returns** dictionary containing lookup topic and last publish time.

**get\_platform** (*platform\_uuid*, *default=None*)

Get a specific PlatformHandler associated with the passed address\_hash. If the hash is not available then the default parameter is returned.

**Parameters**

- **address\_hash** – string associated with a specific platform
- **default** – a default to be returned if not in the collection.

**Returns** a PlatformHandler or default

**get\_platform\_hashes** ()

Returns a list of all the address hashes that are currently registered with VC.

**Returns** list of str

**get\_platform\_list** (*session\_user*, *params*)

Retrieve the platform list and respond in a manner that can be sent back to the web service.

The response will be formatted as follows:

```
[
  {
    "health": { "status": "GOOD", "last_updated": "2017-02-24T19:18:52.723445+00:00",
    "context": "Platform here!"
    }, "name": "tcp://127.0.0.1:22916", "uuid": "vcp-f6e675fb36989f97c3b0f25227aaf02e"
  }
]
```

**Parameters**

- **session\_user** –
- **params** –

**Returns** A list of dictionaries each representing a platform.

**get\_platform\_vip\_identities** ()

Get the “known list” of connected vcp platforms. This returns a set of keys that are available.

**Returns**

**is\_registered** (*platform\_uuid*)

Returns true if the platform is currently known.

**Return type** Boolean

**Returns** Whether the platform is known or not.

**register\_platform** (*address, address\_type, serverkey=None, display\_name=None*)

DEPRECATED VOLTTRON 7.0 Allows an volttron central platform (vcp) to register with vc. Note that if the address has already been used then the same PlatformHandler object reference will be returned to the caller.

**Parameters**

- **address** – An address or resolvable domain name with port.
- **address\_type** – A string consisting of ipc or tcp.

**Param** serverkey: str: The router publickey for the vcp attempting to register.

**Param** display\_name: str: The name to be shown in volttron central.

**Returns** platform\_hash and platform object as a tuple.

**property** vc

## volttroncentral.sessions module

**class** volttroncentral.sessions.**SessionHandler** (*authenticator*)

Bases: `object`

A handler for dealing with authentication of sessions

The SessionHandler requires an authenticator to be handed in to this object in order to authenticate user. The authenticator must implement an interface that expects a method called `authenticate` with parameters `username` and `password`. The return value must be either a list of groups the user belongs to or `None`.

If successful then the a session token is generated and added to a cache of validated users to be able to be checked against. The user’s ip address is stored with the token for further checking of authentication.

**authenticate** (*username, password, ip*)

Authenticates a user with the authenticator.

This is the main login function for the system.

**check\_session** (*token, ip*)

Check if a user token has been authenticated.

**@return:** A users session information or False.

**clear** ()

### 2.45.3 VOLTTRON Central Agent

The VOLTTRON Central agent allows the control of remote VOLTTRON platforms through the registered platform agents. The registration of platforms can be initiated from a remote platform agent. Once a platform agent is registered the allowed operations are start, stop, install, and run methods on the registered platform's agents.

### 2.45.4 Configuration

The agentid does not have to be unique. It is what will be used as a human readable name on volttron central. If it is not set the default 'volttron central' will be used. The default config file is pasted below. in the following.

```
# By default the webroot will be relative to the installation directory
# of the agent when it is installed. One can override this by specifying
# the root directory here.
# "webroot": "path/to/webroot",
```

### 2.45.5 Security Considerations

When deploying any web agent, including VOLTTRON Central, it is important to consider security. Please refer to the documentation for *Security Considerations of Deployment*. In particular, it would be recommended to consider the use of a reverse proxy.

## 2.46 VolttronCentralPlatform

### 2.46.1 vcplatform package

#### vcplatform.agent module

#### vcplatform.vcconnection module

```
class vcplatform.vcconnection.VCConnection(**kwargs)
    Bases: volttron.platform.vip.agent.Agent
```

This agent will connect to an instance with volttron.central agent connected to it. The volttron.central agent will use this agent to communicate with the platform.agent(vcp) running on the current instance of the platform.

**agent\_status** (agent\_uuid)

Retrieves the status of a particular agent executing on the vcp instance. The agent does not have to be executing in order to receive it's status.

**Parameters** agent\_uuid –

**Returns**

**call** (platform\_method, \*args, \*\*kwargs)

**delete\_agent\_config** (agent\_identity, config\_name)

Deletes the configuration from the config store of the passed agent identity.

**Parameters**

• agent\_identity –

• config\_name –

**Returns** The stored configuration.

**get\_agent\_config** (agent\_identity, config\_name, raw=True)

Retrieve the configuration from the config store of the passed agent identity.

**Parameters**

- **agent\_identity** –
- **config\_name** –
- **raw** –

**Returns** The stored configuration.

**get\_devices** ()

Retrieves configuration entries from the config store that begin with 'devices'.

**Returns** dictionary of devices.

**get\_health** ()

Retrieve the health of the vcp agent.

**Returns**

**get\_instance\_name** ()

**get\_instance\_uuid** ()

Retrieve the instance uuid for the vcp agent's instance.

**Returns**

**get\_vip\_addresses** ()

Retrieves the vip addresses that were specified in the configuration file or via command line.

**Returns**

**install\_agent** (*local\_wheel\_file*)

Installs :param local\_wheel\_file: :return:

**is\_connected** ()

**is\_peer\_connected** (*peer='volttron.central'*)

**kill** ()

Dummy method to use install\_agent\_vctl

**list\_agent\_configs** (*agent\_identity*)

List the agent configuration files stored on the volttron instance associated with this agent.

**Parameters** **agent\_identity** – Agent identity to retrieve configuration from.

**Returns** A list of the configuration names.

**list\_agents** ()

Calls list\_agents method on the vcp main agent instance.

---

**Note:** This method only valid for installed agents not dynamic agents.

---

**Returns**

**publish\_bacnet\_props** (*proxy\_identity, publish\_topic, address, device\_id, filter=[]*)

**publish\_to\_vc** (*topic, message=None, headers={}*)

This method allows the main\_agent to publish a message up to the volttron.central instance.

**Parameters**

- **topic** –
- **message** –
- **headers** –

**restart** (*agent\_uuid*)

Performs the stop and start operations on the vcp instance for an agent.

**Parameters** **agent\_uuid** –

**Returns**

**restart\_agent** (*agent\_uuid*)

Calls restart method on the vcp main agent instance.

---

**Note:** This method only valid for installed agents not dynamic agents.

---

**Parameters** *agent\_uuid* –

**Returns**

**route\_to\_agent\_method** (*id, agent\_method, params*)

Calls a method on an installed agent running on the platform.

---

**Note:** This method only valid for installed agents not dynamic agents.

---

**Parameters**

- *id* –
- *agent\_method* –
- *params* –

**Returns**

**set\_main\_agent** (*main\_agent*)

The main agent is the VCP that is using this agent to connect to the remote volttron instance.

**Parameters** *main\_agent* – the agent that instantiated this one.

**start\_agent** (*agent\_uuid*)

Start an agent that is already present on the vcp instance.

**Parameters** *agent\_uuid* –

**Returns**

**start\_bacnet\_scan** (*iam\_topic, proxy\_identity, low\_device\_id=None, high\_device\_id=None, target\_address=None, scan\_length=5*)

Starts a bacnet scan using the the named proxy\_identity as the callee.

**Parameters**

- *iam\_topic* –
- *proxy\_identity* –
- *low\_device\_id* –
- *high\_device\_id* –
- *target\_address* –
- *scan\_length* –

**Returns**

**status\_agents** ()

Return all of the installed agents' statuses for the vcp instance.

**Returns**

**stop\_agent** (*agent\_uuid*)

Stop an agent already running on the vcp instance.

**Parameters** *agent\_uuid* –

**Returns**

**store\_agent\_config** (*agent\_identity, config\_name, raw\_contents, config\_type='raw'*)

Store an agent configuration on the volttron instance associated with this agent.

**Parameters**

- *agent\_identity* –
- *config\_name* –
- *raw\_contents* –
- *config\_type* –

**Returns** None

**subscribe\_to\_vcp** (*prefix, prefix\_on\_vc*)

Allows volttron.central to listen to the message bus on vcp instance.

**Parameters**

- **prefix** – The prefix to listen for.
- **prefix\_on\_vc** – The prefix to publish to on volttron central instance.

## 2.46.2 Volttron Central Platform (VCP)

The VCP exposes a VOLTTRON instance to a Volttron Central (VC) agent. The VC agent can either be on the same or a different VOLTTRON instance. The VCP agent will, once authenticated (with the VC agent's instance), auto connect to the VC agent's instance and register itself on startup. The VCP instance will attempt to reconnect to the VC agent's instance if connection is disrupted. VCP has many configuration options available that can be set via the configuration store and/or initial configuration file.

### Publish Specifications

During connection to the VC agent's instance the instance-name from the VCP will be used to connect to the VC agent's instance. It will have the form vcp-instancename with all invalid characters replaced with an underscore. See `volttron.platform.agent.util.normalize_identity()` for how the instance name is normalized into a identity.

### FAQ / Notes

- VCP agent has an identity of 'platform.agent' this cannot be changed.
- There may only be a single agent connected to a VOLTTRON instances with the identity of 'platform.agent'
- VCP will publish to VC under the topic `platforms/vcp-(normalized instance name)/`
- VC communicates through the `vcplatform.vcconnection.VCConnection` rpc methods.
- VCP uses the `:pyvcplatform.vcconnection.VCConnection` to connect with the VC agent's instance.

### Configuration Options

The following JSON configuration file shows all the options currently supported by the VCP agent. By default an empty config file is used.

```
{
  # The volttron-central-address, volttron-central-serverkey and
  # instance-name may be set in the VCP instance configuration file or
  # or as command line parameters to the VOLTTRON instance.
  #
  # The volttron-central-address is either an http address or a tcp
  # address. If it is an http address vc must be running at the resolution
  # of http://ip:port/discovery/. VCP will use the tcp address and
  # serverkey in the response payload to connect to the VC agent instance.
  #
  # If the specified address is a tcp address then the configuration
  # must also contain a volttron-central-serverkey.
  "volttron-central-address": "http://ip<host>:port" or "tcp://ip:port",
```

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```

# The serverkey of the VC agent's instance.
"volttron-central-serverkey" "VC agent's instance serverkey",

# interval at which VCP will attempt to connect to the VC agent's
# instance when a disconnection occurs.
"volttron-central-reconnect-interval": 5,

# The name of instance to be sent to volttron central for displaying
# on the interface.
"instance-name": "name of instances (VC agent's instance ip address as default)",

# VCP will publish health statistics of the instance at a specified
# interval.
"stats-publish-interval": 30,

# The VCP provides a topic/replace mapping for the platform. It is
# available via rpc function so that sensitive information won't be
# published through forwarding.
#
# The topic-replace-map is used to search/replace all of the topics
# published from ForwardHistorians and other agents that connect with
# external instances.
"topic-replace-map": {
    "from": "to",
    "from1": "to1"
}
}

```

## 2.47 WeatherDotGov

### 2.47.1 weatherdotgov package

#### weatherdotgov.agent module

```

class weatherdotgov.agent.WeatherDotGovAgent (**kwargs)
    Bases: volttron.platform.agent.base_weather.BaseWeatherAgent

    Concrete implementation of the base weather agent for querying the NOAA/weather.gov weather api.

    extract_forecast_data (url, gresponse)

    static generate_response_error (url, response_code)
        raises a descriptive runtime error based on the response code returned by a service. :param url: actual
        url used for requesting data from weather.gov :param response_code: Http response code returned by a
        service following a request

    get_api_description (service_name)
        Provides the api description string for a given api service. Primarily used during concrete agent startup.
        :param service_name: name of the api service :return: string describing the function of the api endpoint,
        along with rpc call usage for the weather agent.

    get_forecast_url (location)

    static get_gridpoints_str (location_dict)
        Converts a location dictionary using gridpoints format into string format to be used in a request url.

```

:param location\_dict: location dictionary for the upcoming request. Expects gridpoint format :return: url formatted location string

**static get\_lat\_long\_str** (*location\_dict*)

Converts a location dictionary using lat/long format into string format to be used in a request url. :param location\_dict: location dictionary for the upcoming request. Expects lat/long :return: url formatted location string

**get\_location\_string** (*location*)

Generic conversion of location dictionary into corresponding string format for request url. :param location: location dictionary formatted as for a specific request. :return: string representation of location dictionary for request url.

**get\_point\_name\_defs\_file** ()

Constructs the point name mapping dict from the mapping csv. :return: dictionary containing a mapping of service point names to standard point names with optional

**static get\_station\_str** (*location\_dict*)

Converts a location dictionary using station format into string format to be used in a request url. :param location\_dict: location dictionary for the upcoming request. Expects station id :return: url formatted location string

**get\_update\_interval** (*service\_name*)

Get the timedelta between api service updates. :param service\_name: name of service stored in api\_services :return: datetime.timedelta object representing the time between the api's service updates

**make\_web\_request** (*url*)

**query\_current\_weather** (*location*)

Abstract method for sending/receiving requests for current weather data from an api service :param location: location for which to query the remote api :return: dictionary containing a single record of current weather data

**query\_forecast\_service** (*service, location, quantity, forecast\_start*)

Queries a remote api service. Available services are determined per weather agent implementation :param service: The desired service end point to query :param location: The desired location for retrieval of weather records :param quantity: number of records to fetch from the service :param forecast\_start: forecast results that are prior to this timestamp will be filtered by base weather agent

**Returns** A list of time series forecast records to be processed and

stored

**query\_hourly\_forecast** (*location*)

Abstract method for sending/receiving requests for forecast weather data from an api service :param location: location for which to query the remote api :return: list of dictionaries containing weather data corresponding to forecast timestamp

**query\_hourly\_historical** (*location, start\_date, end\_date*)

Unimplemented method stub :param location: no format currently determined for history. :param start\_date: Starting date for historical weather period. :param end\_date: Ending date for historical weather period. :return: NotImplementedError

**validate\_location** (*service\_name, location*)

Intermediate method for validating location dicts passed by rpc calls. Validity depends on the service being requested. :param service\_name: name of the api service which the location dictionary is intended to be used for. :param location: location dictionary to validate for the api service :return: boolean indicating whether the location/service combination is valid for the weather api.



**validate\_location\_formats** (*accepted\_formats, location*)

Regular expression comparison to validate the various location dictionary formats :param accepted\_formats: string representations of the acceptable location formats for an api service :param location: location dictionary to validate for the api service :return: boolean representing the validity of the location

```
weatherdotgov.agent.main()
```

” Main entry point for the agent.

```
weatherdotgov.agent.weather_agent (config_path, **kwargs)
```

Used for instantiating the WeatherDotGov agent. :param config\_path: string formatted file path to use for configuring the agent. :param kwargs: keyword arguments passed during instantiation. :return: an instance of the WeatherDotGov Agent

## 2.47.2 WeatherDotgov Agent

This agent provides the ability to query for current and forecast weather data from NOAA. The agent extends BaseWeatherAgent that provides caching of recently requested data, as well as mapping of weather point names from NOAA's naming scheme to the standardized CF-conventions scheme.

### Requirements

The WeatherDotgov agent requires the Pint package. This package can be installed in an activated environment with:

```
pip install pint
```

### Configuration

The following is an example configuration for the Weather.gov agent. All configuration parameters are optional.

#### Parameters

1. "database\_file" - sqlite database file for weather data caching. Defaults to "weather.sqlite" in the agent's data directory
2. "max\_size\_gb" - maximum size of cache database. When cache exceeds this size, data will get purged from cache until the cache is within the configured size.
3. "poll\_locations" - list of locations to periodically poll for current data.
  1. For current weather, the only supported location format is station id. Format: [{"station": "KLAX"}, {"station": "KBOI"}]
  2. For hourly forecast supported location formats are
    1. wfo, x, y - Format: {"wfo": "BOU", "x": 54, "y": 62}
    2. latitude, longitude - Format: {"lat": 39.0693, "long": -94.6716}. Weather agent will first lookup wfo,x,y for the given latitude and longitude and then get the forecast data based on wfo, x, y
    3. station id - Format: [{"station": "KLAX"}, {"station": "KBOI"}] The input list can contain valid locations with different formats. For example, [{"station": "KLAX"}, {"station": "KBOI"}, {"wfo": "BOU", "x": 54, "y": 62}] is a valid input list for hourly forecast
4. "poll\_interval" - polling frequency or the number of seconds between each poll.

```
{
  "database_file": "weather.sqlite",
  "max_size_gb": 1,
  "poll_locations": [{"station": "KLAX"}, {"station": "KPHX"}],
  "poll_interval": 60
}
```

### 2.47.3 Registry Configuration

The registry configuration file for this agent can be found in agent's data directory. This configuration provides the point name mapping from NOAA's point scheme to the CF-conventions scheme by default. The file leaves the unit name columns for each point blank, as this agent does not include unit conversion. Points that do not specify 'Standard\_Point\_Name' were found to not have a logical match to any point found in the CF-Conventions. For these points NOAA point names (Service\_Point\_Name) will be used.

#### Notes

The WeatherDotGov agent does not utilize an API key, as NOAA allows users to gather weather data for free, and does not provide nor require keys.

This implementation of the weather agent does not include historical weather data, as NOAA does not provide an accessible endpoint from which historical data may be obtained.

Data provided by NOAA is in a nested dictionary format. The base weather agent does not handle unit conversion for arbitrary nested dictionary format and hence this agent does not support unit conversion at this time.

## 2.48 AgentWatcher

### 2.48.1 watcher package

#### watcher.agent module

```
class watcher.agent.AgentWatcher (config_path, **kwargs)
    Bases: volttron.platform.vip.agent.Agent

    onstart (sender, **kwargs)

    watch_agents ()

watcher.agent.main ()
```

### 2.48.2 Agent Watcher

The Agent Watcher is used to monitor agents running on a VOLTTRON instance. Specifically it monitors whether a set of VIP identities (peers) are connected to the instance. If any of the peers in the set are not present then an alert will be sent.

## Configuration

The agent has two configuration values:

- **watchlist**: a list of VIP identities to watch on the platform instance
- **check-period**: interval in seconds between the agent watcher checking the platform peerlist and publishing alerts

```
{
  "watchlist": [
    "platform.driver",
    "platform.actuator"
  ],
  "check-period": 10
}
```

## Example Publish

The following is an example publish from a platform with an instance of the Platform Driver installed but not running.

```
Peer: pubsub
Sender: watcheragent-0.1_1
Bus:
Topic: alerts/AgentWatcher/james_watcheragent-0_1_1
Headers: {'alert_key': 'AgentWatcher', 'min_compatible_version': '3.0', 'max_
↪compatible_version': ''}
Message: ( '{"status": "BAD", "context": "Agent(s) expected but but not running '
          '['platform.driver\']", "last_updated": "2021-01-25T23:25:43.065109+00:00
↪"} ' )
```

## 2.49 EmailerAgent

### 2.49.1 emailer package

#### emailer.agent module

**class** `emailer.agent.EmailerAgent` (*config\_path*, *\*\*kwargs*)

Bases: `volttron.platform.vip.agent.Agent`

**configure\_main** (*config\_name*, *action*, *contents*)

The main configuration callback.

#### Parameters

- **config\_name** –
- **action** –
- **contents** –

**on\_alert\_message** (*peer*, *sender*, *bus*, *topic*, *headers*, *message*)

Callback for alert messages that come into the platform.

#### Parameters

- **peer** –
- **sender** –
- **bus** –
- **topic** –
- **headers** –

- **message** –

**on\_email\_message** (*peer, sender, bus, topic, headers, message*)

Callback used for sending email messages through the pubsub bus.

Either the `from_address` and `to_addresses` can be omitted if they are specified in the configuration store/file. If they are to be used the following block shows the format for usage.

```
{
  "from-address": 'foo@bar.com',
  "to-addresses": ['alpha.beta@fo.com', 'bob-and-joe@bim.com']
}
```

**\*\* In the above code to-addresses can be a single email address as well\*\***

The message must be a dictionary containing a subject and a message. In addition, an optional `to-addresses` entry can be added for sending to a specific group of users.

```
{
  "subject": "I am a happy camper",
  "message": "This is a big long string message that I am sending"
  -- OPTIONAL --
  "to-addresses": ['yabba@daba.com']
}
```

#### Parameters

- **peer** –
- **sender** –
- **bus** –
- **topic** –
- **headers** –
- **message** –

**send\_email** (*from\_address, to\_addresses, subject, message*)

RPC Method allowing a platform to send an email address.

One can also send an email through the pubsub mechanism.

#### Parameters

- **from\_address** –
- **to\_addresses** –
- **subject** –
- **message** –

```
emailer.agent.main(argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex', '-D', 'language=en', '-d', '_build/doctrees', '.', '_build/latex'])
```

Main method called by the aip.

## 2.49.2 Emailer

The Emailer agent allows an instance of the VOLTRON platform to send email. When used in combination with the Alert agent, alerts from unpublished configured devices will automatically be sent. In addition, agents are able to send emails directly through the pub/sub interface.

Agents needing to send an email through the instance can do so by sending the following header and message to the `platform/send_email` topic which is monitored by the Emailer agent. The following is the expected payload for the message body and the optional header.

### Optional Headers

Emails by default will be sent to the initial configured email addresses. The below headers will overwrite those properties for the current email being sent.

```
{
  "from-address": 'foo@bar.com',
  "to-addresses": ['alpha.beta@foo.com', 'bob-and-joe@bar.com']
}
```

### Required Message Body

```
{
  "subject": "I am a happy camper",
  "message": "This is a big long string message that I am sending"
}
```

### Example Sending of Email

```
headers = {
  "from-address": 'foo@bar.com',
  "to-addresses": ['alpha.beta@foo.com', 'bob-and-joe@bar.com']
}

message = {
  "subject": "I am a happy camper",
  "message": "This is a big long string message that I am sending"
}

self.vip.pubsub.publish('pubsub', topic='platform/send_email',
                        headers=headers, message=message)
```

## Configuration Options

The following JSON configuration file shows all the options currently supported by the Forward Historian agent.

```
{
    # The smtp-address (Simple Mail Transfer Protocol) to ship the email
    # from (the "from-address" to each of the recipients).
    "smtp-address": "smtp.example.com",

    # The smtp-username is to provide the username of the SMTP server
    # which is being used for sending the messages.
    "smtp-username": "<smtp-username>",

    # The smtp-password is to provide the password of the SMTP server
    # corresponding to the username which is being used for sending the messages.
    "smtp-password": "<smtp-password>",

    # The smtp-port is to provide the port of the SMTP server.
    "smtp-port": "<smtp-port>",

    # The smtp-tls yes or no if we want to use TLS.
    "smtp-tls": "<true/false>",

    # The sending address of the email. This value will be listed in the
    # FROM attributed of the message envelop. It will also be show in the
    # reply of the message when a recipient chooses reply from their
    # email client.
    "from-address": "no-reply@example.com",

    # A list of default email addresses for sending alerts to. Each
    # address will be sent a copy of the email as if from a mailing list.
    "to-addresses": [
        "admin1@example.com"
    ],

    # When an alert is sent typically it can have the effect of being
    # sent many times. This setting throttles the sending of email only
    # after a specific number of minutes.
    #
    # DEFAULT: "allow-frequency-minutes": 60
    "allow-frequency-minutes": 120
}
```

## 2.50 FileWatchPublisher

### 2.50.1 filewatchpublisher package

#### filewatchpublisher.agent module

**class** filewatchpublisher.agent.**FileWatchPublisher**(*config*, *\*\*kwargs*)

Bases: volttron.platform.vip.agent.Agent

Monitors files from configuration for changes and publishes added lines on corresponding topics. Ignores if a file does not exist and move to next file in configuration with an error message. Exists if all files does not exist.

:param config: Configuration dict :type config: dict

Example configuration:

```
{
  "publish_file": [
    {
      "file": "/var/log/syslog",
      "topic": "platform/syslog",
    },
    {
      "file": "/home/volttron/tempfile.txt",
      "topic": "temp/filepublisher",
    }
  ]
}
```

**get\_end\_position** (*f*)

**publish\_file** (*line*, *topic*)

**read\_file** (*file*)

**starting** (*sender*, *\*\*kwargs*)

`filewatchpublisher.agent.file_watch_publisher` (*config\_path*, *\*\*kwargs*)

Load the FileWatchPublisher agent configuration and returns an instance of the agent created using that configuration. :param config\_path: Path to a configuration file. :type config\_path: str :returns: FileWatchPublisher agent instance :rtype: FileWatchPublisher agent

`filewatchpublisher.agent.main` (*argv*=['/home/docs/checkouts/readthedocs.org/user\_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/\_\_main\_\_.py', '-b', 'latex', '-D', 'language=en', '-d', '\_build/doctrees', '.', '\_build/latex'])

Main method called by the platform.

## 2.50.2 File Watch Publisher Agent

The File Watch Publisher agent watches files listed in its configuration for changes. The agent will detect changes to those files and publish those changes line-by-line on the topic the user has associated with the file in the configuration.

The user should be careful about what files are being watched, and which historians are being used with the File Watch Publisher. Very long lines being output in individual messages on the message bus can result in some performance degradation. Some configurations of the File Watch Publisher can affect the system (such as using I/O resources when a fast-moving log is being captured in a SQLite Historian), so the user should be intentional about which files the agent is configured to watch and the topics used for publishes.

### Example Usage

The user wants to record logging information from the “myservice” service into a historian agent.

The user can configure the File Watch Publisher to point at the “myservice.log” file with a corresponding “record” topic - for example “record/myservice/logs”. As “myservice” adds logging entries to its log file, the File Watch Publisher will capture each new log message and publish it to the “record/myservice/logs” topics on the message bus.

Below is a File Watch Publisher example configuration to match the above scenario.

## Configuration

```
{
  "files": [
    {
      "file": "/opt/myservice/logs/myservice.log",
      "topic": "record/myservice/logs"
    }
  ]
}
```

### Example Publish

The following is an example publish by the File Watch Publisher installed with the above configuration.

```
Peer: pubsub
Sender: platform.filewatchpublisher1
Bus:
Topic: record/myservice/logs
Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}
Message: {'line': 'test text', 'timestamp': '2021-01-25T22:54:43.474352Z'}
```

## 2.51 LogStatisticsAgent

### 2.51.1 logstatisticsagent package

#### logstatisticsagent.agent module

**class** logstatisticsagent.agent.**LogStatisticsAgent** (*config*, *\*\*kwargs*)

Bases: volttron.platform.vip.agent.Agent

LogStatisticsAgent reads volttron.log file size every hour, compute the size delta from previous hour and publish the difference with timestamp. It also publishes standard deviation every 24 hours. :param config: Configuration dict :type config: dict Example configuration: .. code-block:: python

```
{ "file_path": "/home/volttron/volttron.log", "analysis_interval_sec": 60, "publish_topic": "platform/log_statistics", "historian_topic": "analysis/log_statistics" }
```

**get\_file\_size** ()

**publish\_analysis** ()

Publishes file's size increment in previous time interval (60 minutes) with timestamp. Also publishes standard deviation of file's hourly size differences every 24 hour.

**starting** (*sender*, *\*\*kwargs*)

logstatisticsagent.agent.**log\_statistics** (*config\_path*, *\*\*kwargs*)

Load the LogStatisticsAgent agent configuration and returns an instance of the agent created using that configuration. :param config\_path: Path to a configuration file. :type config\_path: str :returns: LogStatisticsAgent agent instance :rtype: LogStatisticsAgent agent

logstatisticsagent.agent.**main** (*argv*=[*'/home/docs/checkouts/readthedocs.org/user\_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/\_\_main\_\_.py'*, *'-b'*, *'latex'*, *'-D'*, *'language=en'*, *'-d'*, *'\_build/doctrees'*, *'.'*, *'\_build/latex'*])

Main method called by the platform.



## 2.51.2 Log Statistics Agent

The Log Statistics agent periodically reads the “volttron.log” file based on the configured interval, computes the size delta from the previous hour and publishes the difference in bytes with a timestamp. It also publishes standard deviation of the size delta every 24 hours. This agent can be useful for detecting unexpected changes to the system which may be an indication of some sort of failure or breach.

### Configuration

The Log Statistics agent has 4 required configuration values:

- `file_path`: This should be the path to the “volttron.log” file
- `analysis_interval_secs`: The interval in seconds between publishing the size delta statistic to the message bus
- `publish_topic`: Can be used to specify a topic to publish log statistics to which does not get captured by the historian framework (topics not prefixed by any of: “datalogger”, “record”, “analysis”, “devices”)
- `historian_topic`: Can be used to specify a topic to publish log statistics to which gets captured by the historian framework (“datalogger”, “record”, “analysis”, “devices”)

The following is an example configuration file:

```
{
  "file_path" : "~/volttron/volttron.log",
  "analysis_interval_min" : 60,
  "publish_topic" : "platform/log_statistics",
  "historian_topic" : "record/log_statistics"
}
```

### Periodic Publish

The Log Statistics agent will run statistics publishes automatically based on the configured intervals.

The following is an example of a periodic size delta publish:

```
Peer: pubsub
Sender: platform.logstatisticsagent1
Bus:
Topic: platform/log_statistics
Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}
Message: {'log_size_delta': 902, 'timestamp': '2021-01-25T22:48:16.924135Z'}
```

## 2.52 SysMonAgent

### 2.52.1 sysmon package

#### sysmon.agent module

```
class sysmon.agent.SysMonAgent (config, **kwargs)
    Bases: volttron.platform.vip.agent.Agent
    Monitor utilization of system resources (CPU, memory, disk)
```

The percent usage of each system resource can be queried via RPC and they are published periodically to configured topics.

**Parameters** `config` (*dict*) – Configuration dict

Example configuration:

```
{
    "base_topic": "datalogger/log/platform",
    "cpu_check_interval": 5,
    "memory_check_interval": 5,
    "disk_check_interval": 5,
    "disk_path": "/"
}
```

**cpu\_percent** ()

Return CPU usage percentage

**disk\_percent** ()

Return usage of disk mounted at configured path

**memory\_percent** ()

Return memory usage percentage

**reconfigure** (\*\*kwargs)

Reconfigure the agent

**start** (sender, \*\*kwargs)

Set up periodic publishing of system resource data

`sysmon.agent.main` (argv=['/home/docs/checkouts/readthedocs.org/user\_builds/volttron/envs/releases-8.2/lib/python3.6/site-packages/sphinx/\_\_main\_\_.py', '-b', 'latex', '-D', 'language=en', '-d', '\_build/doctrees', '.', '\_build/latex'])

Main method called by the platform.

`sysmon.agent.sysmon_agent` (config\_path, \*\*kwargs)

Load the SysMon Agent configuration and returns and instance of the agent created using that configuration.

**Parameters** `config_path` (*str*) – Path to a configuration file.

**Returns** SysMonAgent instance

**Return type** *SysMonAgent*

## 2.52.2 System Monitoring (SysMon) Agent

The System Monitoring Agent (colloquially “SysMon”) can be installed on the platform to monitor system resource metrics, including percent CPU utilization, percent system memory (RAM) utilization, and percent storage (disk) utilization based on disk path.

### Configuration

The SysMon agent has 5 configuration values, all of which are optional:

- “base\_topic”: Topic prefix used to publish all system metric points, is formatted with the metric function name in publishes (i.e. “base/topic/prefix/cpu\_percent”) - default “datalogger/log/platform”
- “cpu\_check\_interval”: Interval in seconds between publishes of % all core CPU utilization - default 5
- “memory\_check\_interval”: Interval in seconds between publishes of % system memory (RAM) utilization - default 5

- “disk\_check\_interval”: Interval in seconds between publishes of % disk utilization for the configured disk - default 5
- “disk\_path”: Directory path used as the root directory for a mounted disk (Currently, the SysMon agent supports collecting metrics for only 1 disk at a time) - default “/”

```
{
  "base_topic": "datalogger/log/platform",
  "cpu_check_interval": 5,
  "memory_check_interval": 5,
  "disk_check_interval": 5,
  "disk_path": "/"
}
```

## Periodic Publish

At the interval specified by the configuration option for each resource, the agent will automatically query the system for the resource utilization statistics and publish it to the message bus using the topic as previously described. The message content for each publish will contain only a single numeric value for that specific topic. Currently, “scrape\_all” style publishes are not supported.

The following are example publishes as captured by the Listener agent into the VOLTTTRON log:

```
2020-03-10 11:20:33,755 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
→Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/cpu_percent,
→Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
4.8
2020-03-10 11:20:33,804 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
→Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/memory_percent,
→Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
35.6
2020-03-10 11:20:33,809 (listeneragent-3.3 7993) listener.agent INFO: Peer: pubsub,
→Sender: platform.sysmon:, Bus: , Topic: datalogger/log/platform/disk_percent,
→Headers: {'min_compatible_version': '3.0', 'max_compatible_version': ''}, Message:
65.6
```

## JSON RPC Methods

- cpu\_percent: Returns current % all core CPU utilization, takes no parameters
- memory\_percent: Returns current % system memory (RAM) utilization, takes no parameters
- disk\_percent: Returns current % disk (ROM) utilization for the configured disk, takes no parameters

## 2.53 ThresholdDetectionAgent

### 2.53.1 thresholddetection package

#### thresholddetection.agent module

```
class thresholddetection.agent.ThresholdDetectionAgent (config, **kwargs)
    Bases: voltttron.platform.vip.agent.Agent
    Listen to topics and publish alerts when thresholds are passed.
```

The agent’s configuration specifies which topics to watch, the topic’s threshold, and the message to send in an alert. Topics can specify a maximum and minimum threshold. Non-numeric data will be ignored.

Example configuration:

```
{
  "datalogger/log/platfor/cpu_percent": {
    "threshold_max": 99,
  },
  "some/temperature/topic": {
    "threshold_min": 0,
  },
  "devices/some/device/topic/all": {
    "some_point": {
      "threshold_max": 42,
      "threshold_min": 0
    }
  }
}
```

```
thresholddetection.agent.main (argv=['/home/docs/checkouts/readthedocs.org/user_builds/volttron/envs/releases-
8.2/lib/python3.6/site-packages/sphinx/__main__.py', '-b', 'latex',
'-D', 'language=en', '-d', '_build/doctrees', '.', '_build/latex'])
```

Main method called by the platform.

```
thresholddetection.agent.thresholddetection_agent (config_path, **kwargs)
```

Load configuration for ThresholdDetectionAgent

**Parameters** `config_path` (*str*) – Path to a configuration file.

**Returns** ThresholdDetectionAgent instance

**Return type** *ThresholdDetectionAgent*

## 2.53.2 Threshold Detection Agent

The ThresholdDetectionAgent will publish an alert when a value published to a topic exceeds or falls below a configured value.

The agent subscribes to the topics listed in the configuration file and publishes alerts when the callback receives a value for the point above the max (if configured) or below the min (if configured) corresponding to the point in the configuration file.

### Configuration

The Threshold Detection agent supports observing individual point values from their respective topics or from a device’s all publish. Points to watch are configured as JSON key-value pairs as follows:

- **Key:** The key is the point topic for the point to watch, or the device’s “all” topic if watching points from the all publish (i.e. “devices/campus/building/device/point” or “devices/campus/building/device/all” if using the all topic)
- **Value:** Using point topic: JSON object specifying the min (“threshold\_min”) and max (“threshold\_max”) threshold values for the point. Only one of the thresholds are required, but both may be used.

Example:

```
{
  "point0": {
    "threshold_max": 10,
```

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```

        "threshold_min": 0
    },
    "point1": {
        "threshold_max": 42
    }
}

```

Using device “all” topic: JSON object with the key as the point name and value being the threshold object described above

Example

```

{
  "devices/some/device/all": {
    "point0": {
      "threshold_max": 10,
      "threshold_min": 0
    },
    "point1": {
      "threshold_max": 42
    }
  }
}

```

Example configuration:

```

{
  "datalogger/log/platform/cpu_percent": {
    "threshold_max": 99
  },
  "datalogger/log/platform/memory_percent": {
    "threshold_max": 99
  },
  "datalogger/log/platform/disk_percent": {
    "threshold_max": 97
  },
  "devices/campus/building/fake/all": {
    "EKG_Sin": {
      "threshold_max": 0.1,
      "threshold_min": -0.1
    }
  }
}

```

## Example Publish

This example publish uses the example config above along with a fake driver running on the platform.

```

Peer: pubsub
Sender: platform.thresholddetection
Bus:
Topic: alerts/ThresholdDetectionAgent/james_platform_thresholddetection
Headers: {'alert_key': 'devices/campus/building/fake/all', 'min_compatible_version':
↪ '3.0', 'max_compatible_version': ''}
Message: ('{"status": "BAD", "context": "devices/campus/building/fake/all (EKG_Sin) '

```

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```
'value (-0.4999999999999997) is below acceptable limit (-0.1)", '
'last_updated': "2021-01-25T22:39:35.035606+00:00"}')
```

## 2.54 TopicWatcher

### 2.54.1 topic\_watcher package

#### topic\_watcher.agent module

**class** topic\_watcher.agent.AlertAgent (config\_path, \*\*kwargs)  
 Bases: volttron.platform.vip.agent.Agent

**create\_alert\_group** (group\_name, config)

**decrement\_ttl** ()  
 Periodic call

Used to maintain the time since each topic's last publish. Sends an alert if any topics are missing.

**ignore\_topic** (group, topic)  
 RPC method

Remove a topic from agent's watch list. Alerts will no longer be sent if a topic stops being published.

#### Parameters

- **group** (*str*) – Group that should ignore the topic.
- **topic** (*str*) – Topic to remove from the watch list.

**onstart** (sender, \*\*kwargs)  
 Setup database tables for persistent logs

**onstop** (sender, \*\*kwargs)

**property** remote\_agent

**reset\_remote\_agent** ()

**watch\_device** (group, topic, timeout, points)  
 RPC method

Watch a device's ALL topic and expect points. If the given group is new creates and starts an instance of group agent for the new group. The group onstart will start watching for the given device points

**Pararm group** Group that should watch the device.

#### Parameters

- **topic** (*str*) – Topic expected to be published.
- **timeout** (*int*) – Seconds before an alert is sent.
- **points** (*[str]*) – Points to expect in the publish message.

**watch\_topic** (group, topic, timeout)  
 RPC method

Listen for a topic to be published within a given number of seconds or send alerts. If the given group is new creates and starts an instance of AlertGroup agent for the new group. The alert group agent, onstart, will start watching for the given topics

**Pararm group** Group that should watch the topic.

#### Parameters

- **topic** (*str*) – Topic expected to be published.
- **timeout** (*int*) – Seconds before an alert is sent.

```
class topic_watcher.agent.AlertGroup(group_name, config, connection, main_agent, publish_local=True, publish_remote=False)
```

Bases: `object`

**static** `get_topic_name` (*parts*)

Return the input parameter if input parameter is a string. If input parameter is a tuple, expects an all topic as the first list element and point name as the second element of the tuple. strips “all” from the end of topic name and add the point name to it to get point topic string :param parts: topic name or (all topic, point name) :type parts: str or list :return: topic string :rtype: str

**ignore\_topic** (*topic*)

Remove a topic from the group watchlist

**Parameters** `topic` (*str*) – Topic to remove from the watch list.

**log\_time\_up** (*up\_time, log\_topics*)

Log into topic\_log table when the alert agent found publishes to a topic after the last time it timed out. :param up\_time: Time when message was published to the topic. Note that this need not be the same as the timestamp in message header which gets recorded in the historian. For example, when older device scrapes are replayed. :param log\_topics: The list of configured topics for which message was received. Entries in this list can either be topic string or a tuple containing an all topic and a point name. :type up\_time: datetime :type log\_topics: list

**log\_timeout** (*log\_topics*)

logs into database the last time a topic was seen before a time out or current time if topic was never seen from the time of alert agent start. :param log\_topics: The list of configured topics for which message was received. Entries in this list can either be topic string or a tuple containing an all topic and a point name. :type log\_topics: list

**parse\_config** ()

**reset\_time** (*peer, sender, bus, topic, headers, message*)

Callback for topic subscriptions

Resets the timeout for topics and devices when publishes are received.

**restart\_timer** ()

Reset timer for all topics in this alert group. Should be called when a new topic is added to a currently active alert group

**send\_alert** (*unseen\_topics*)

Send an alert for the group, summarizing missing topics.

**Parameters** `unseen_topics` (*list*) – List of topics that were expected but not received

**watch\_device** (*topic, timeout, points*)

Watch a device’s ALL topic and expect points. This method calls the watch topic method so both methods don’t need to be called.

**Parameters**

- **topic** (*str*) – Topic expected to be published.
- **timeout** (*int*) – Seconds before an alert is sent.
- **points** (*[str]*) – Points to expect in the publish message.

**watch\_topic** (*topic, timeout*)

Listen for a topic to be published within a given number of seconds or send alerts.

**Parameters**

- **topic** (*str*) – Topic expected to be published.
- **timeout** (*int*) – Seconds before an alert is sent.

```
topic_watcher.agent.main()
```

## 2.54.2 Topic Watcher Agent

The Topic Watcher Agent listens to a set of configured topics and publishes an alert if they are not published within some time limit. In addition to for individual messages or data points, the Topic Watcher Agent supports inspecting device “all” topics. This can be useful when a device contains volatile points that may not be published.

### Configuration

Topics are organized by groups in a JSON structure with the group’s identifier as the key. Any alerts raised will summarize all missing topics in the group.

There are two configuration options for watching topics. For single message topics (such as a single device point), configuration consists of a key value pair of the topic to its time limit.

```
{
  "groupname": {
    "devices/campus/building/point": 10
  }
}
```

For points published in an “all” style publish, configuration consists of a key mapping to an object as follows: A `seconds` key for the time limit in seconds, and a `points` key consisting of a list of individual points in the `all` publish.

The following is an example “all” publish configuration which configures the Topic Watcher to check for the `temperature` and `PowerState` points which are expected to be inside the “all” publishes.

```
{
  "groupname": {
    "devices/fakedriver1/all": {
      "seconds": 10,
      "points": ["temperature", "PowerState"]
    }
  }
}
```

It is possible to configure the Topic Watcher to handle both “all” topics and single point topics for the same group:

```
{
  "groupname": {
    "devices/fakedriver0/all": 10,
    "devices/fakedriver1/all": {
      "seconds": 10,
      "points": ["temperature", "PowerState"]
    }
  }
}
```



## Example Publish

The following is an example publish from the Topic Watcher Agent using the above configuration.

```
Peer: pubsub
Sender: platform.topic_watcher
Bus:
Topic: alerts/AlertAgent/james_platform_topic_watcher
Headers: {'alert_key': 'AlertAgent Timeout for group group1', 'min_compatible_version': '3.0', 'max_compatible_version': ''}
Message: ('{"status": "BAD", "context": "Topic(s) not published within time limit: '['\devices/fakedriver0/all\']"', "last_updated": "2021-01-25T23:10:07.905633+00:00"}')
```

## 2.55 VOLTTRON Releases

This section includes individual documents describing important changes to platform components. For information on specific release, please refer to the corresponding document.

### 2.55.1 Release History

VOLTTRON Release Documentation for version 5.1.0 and above is found on GitHub. <https://github.com/VOLTTRON/volttron/releases>

#### VOLTTRON 8.2 Release

<https://github.com/VOLTTRON/volttron/releases/tag/8.2>

#### VOLTTRON 8.1.3 Maintenance Release

<https://github.com/VOLTTRON/volttron/releases/tag/8.1.3>

#### VOLTTRON 8.1.2 Maintenance Release

<https://github.com/VOLTTRON/volttron/releases/tag/8.1.2>

#### VOLTTRON 8.1.1 Maintenance Release

<https://github.com/VOLTTRON/volttron/releases/tag/8.1.1>

### **VOLTTRON 8.1 Release**

<https://github.com/VOLTTRON/volttron/releases/tag/8.1>

### **VOLTTRON 8.0 Full Release**

<https://github.com/VOLTTRON/volttron/releases/tag/8.0.0>

### **VOLTTRON 7.0.1 Update**

<https://github.com/VOLTTRON/volttron/releases/tag/7.0.1>

### **VOLTTRON 8.0 Release Candidate**

<https://github.com/VOLTTRON/volttron/releases/tag/8.0rc1>

### **VOLTTRON 7.0 Release**

<https://github.com/VOLTTRON/volttron/releases/tag/7.0>

### **VOLTTRON 7.0 Release Candidate**

<https://github.com/VOLTTRON/volttron/releases/tag/7.0rc1>

### **VOLTTRON 6.0 Release**

<https://github.com/VOLTTRON/volttron/releases/tag/6.0>

### **VOLTTRON 6.0 Release Candidate**

<https://github.com/VOLTTRON/volttron/releases/tag/6.0rc1>

### **VOLTTRON 5.1.0 Release**

<https://github.com/VOLTTRON/volttron/releases/tag/5.1.0>

### **VOLTTRON 5.0 Release**

- Tagging service for attaching metadata to topics for simpler retrieval
- Message bus performance improvement
- Multi-platform publish/subscribe for simpler coordination across platforms
- Drivers contributed back for SEP 2.0 and ChargePoint EV

### **VOLTTRON 4.0 Release**

- Documentation moved to ReadTheDocs
- VOLTTRON Configuration Wizard
- Configuration store to dynamically configure agents
- Aggregator agent for aggregating topics
- More reliable remote install mechanism
- UI for device configuration
- Automatic registration of VOLTTRON instances with management agent

### **VOLTTRON 3.0 Release**

- Modularize Data Historian
- Modularize Device Drivers
- Secure and accountable communication using the VIP
- Web Console for Monitoring and Administering VOLTTRON Deployments

### **VOLTTRON 2.0 Release**

- Advanced Security Features
- Guaranteed resource allocation to agents using execution contracts
- Signing and verification of agent packaging
- Agent mobility
- Admin can send agents to another platform
- Agent can request to move
- Enhanced command framework

### **VOLTTRON 1.0 – 1.2**

- Agent execution platform
- Message bus
- Modbus and BACnet drivers
- Historian
- Data logger
- Device scheduling
- Device actuation
- Multi-node communication
- Weather service

## 2.55.2 Upgrading Existing Deployments

It is often recommended that users upgrade to the latest stable release of VOLTTRON for their deployments. Major releases include helpful new features, bug fixes, and other improvements. Please see the guides below for upgrading your existing deployment to the latest version.

### VOLTTRON 8

VOLTTRON 8 introduces three changes that require an explicit upgrade step when upgrading from a earlier VOLTTRON version

1. Dynamic RPC authorization feature - This requires a modification to the auth file. If you have a pre-existing instance of VOLTTRON running on an older version, the auth file will need to be updated.
2. Historian agents now store the cache database (backup.sqlite file) in `<volttron home>/agents/<agent uuid>/<agentname-version>/<agentname-version>.agent-data` directory instead of `<volttron home>/agents/<agent uuid>/<agentname-version>` directory. In future all core agents will write data only to the `<agentname-version>.agent-data` subdirectory. This is because `vctl install -force` backs up and restores only the contents of this directory.
3. SQLHistorians (historian version 4.0.0 and above) now use a new database schema where metadata is stored in topics table instead of separate metadata table. SQLHistorians with version `>= 4.0.0` can work with existing database with older schema however the historian agent code should be upgraded to newer version (`>=4.0.0`) to run with VOLTTRON 8 core.
4. VOLTTRON feature to run individual agents as unique Unix users is now named “agent-isolation-mode” and is consistently referred to using this name in code, configuration, and documentation. Before VOLTTRON 8.2 this configuration parameter was called “secure-agent-users” and related documentation referred to this mode as “secure mode”.

To upgrade:

1. If upgrading historian, make sure historians are not in auto start mode. To remove any historian from auto start mode use the command `'vctl disable <uuid of historian that is currently enabled>'`. This is necessary so that the old sqlhistorian does not automatically start after step 5.
2. Update volttron source code version to VOLTTRON 8
3. activate the volttron environment, and run `'python bootstrap.py --force'`. If you have any additional bootstrap options that you need (rabbitmq, web, drivers, etc.) include these in the above command.
4. Run `'volttron-upgrade'` to update the auth file, move historian cache files into agent-data directory, and rename the config parameter “secure-agent-users” in `VOLTTRON_HOME/config` to “agent-isolation-mode” Note that the upgrade script will only move the backup.sqlite file and will not move sqlite historian’s db file if they are within the install directory. If using a SQLite historian, please backup the database file of sqlite historian before upgrading to the latest historian version.
5. Start VOLTTRON
6. Run `'vctl install --force --vip-identity <vip id of existing historian> --agent-config <config>'` to upgrade to the latest historian version. `vctl install -force` will backup the cache in `<agent-version>.agent-data` folder, installs the latest version of the historian and restore the contents of `<agent-version>.agent-data` folder.

## Upgrading aggregate historians

VOLTTTRON 8 also comes with updated SQL aggregate historian schema. However, there is no automated upgrade path for aggregate historian. To upgrade an existing aggregate historian please refer to the `CHANGELOG.md` within `SQLAggregateHistorian` source directory

## VOLTTTRON 7

VOLTTTRON 7 includes a migration from Python 2.7 to Python 3.6, as well as security features, new agents, and more.

### From 6.x

From version 6.x to 7.x important changes have been made to the virtual environment as well as [VOLTTTRON\\_HOME](#). Take the following steps to upgrade:

---

**Note:** The following instructions are for debian based Linux distributions (including Ubuntu and Linux Mint). For Red Hat, Arch or other distributions, please use the corresponding package manager and commands.

---

1. Install the VOLTTTRON dependencies using the following command:

```
sudo apt install python3-dev python3-venv libffi-dev
```

---

**Note:** This assumes you have existing 6.x dependencies installed. If you're unsure, refer to the [platform installation](#) instructions.

---

2. Remove your existing virtual environment and run the bootstrap process.

To remove the virtual environment, change directory to the VOLTTTRON project root and run the `rm` command with the `-r` option.

```
cd $VOLTTTRON_ROOT/
rm -r env
```

Now you can use the included `bootstrap.py` script to set up the new virtual environment. For information on how to install dependencies for VOLTTTRON integrations, run the script with the `--help` option.

```
python3 bootstrap.py <options>
```

---

**Note:** Because the new environment uses a different version of Python, using the `--force` option with bootstrap will throw errors. Please follow the above instructions when upgrading.

---

3. Make necessary `VOLTTTRON_HOME` changes

**Warning:** It is possible that some existing agents may continue to operate after the platform upgrade, however this is not true for most agents, and it is recommended to reinstall the agent to ensure the agent wheel is compatible and that there are no side-effects.

A. Reinstall Agents

It is recommended to reinstall all agents that exist on the platform to ensure the agent wheel is compatible with Python3 VOLTTRON. In many cases, the configurations for version 7.x are backwards compatible with 6.x, requiring no additional changes from the user. For information on individual agent configs, please read through that agent's documentation.

#### B. Modify Agent Directories

---

**Note:** Modifying the agent directories is only necessary if not reinstalling agents.

---

To satisfy the security requirements of the secure agents feature included with VOLTTRON 7, changes have been made to the agent directory structure.

##### 1. Keystore.json

The agent keystore file has been moved from the agent's *agent-data* directory to the agent's *dist-info* directory. To move the file, change directory to the agents install directory and use the *mv* command.

```
cd $VOLTTRON_HOME/agents/<agent uuid>/<agent dir>
mv <agent>agent.agent-data/keystore.json <agent>agent.dist-info/
```

##### 2. Historian Database

Historians with a local database file have had their default location change to the *data* directory inside of the agent's install directory. It is recommended to relocate the file from `$VOLTTRON_HOME/data` to the agent's data directory. Alternatively, a path can be used if the user the agent is run as (the VOLTTRON user for deployments not using the secure agents feature) has read-write permissions for the file.

```
mv $VOLTTRON_HOME/data/historian.sqlite $VOLTTRON_HOME/agents/<agent_
↳uuid>/<agent>/data
```

**Warning:** If not specifying a path to the database, the database will be created in the agent's data directory. This is important if removing or uninstalling the historian as the database file will be removed when the agent dir is cleaned up. Copy the database file to a temporary directory, reinstall the agent, and move the database file back to the agent's data directory

##### 4. Forward Historian

For deployments which are passing data from 6.x VOLTTRON to the latest 7.x release, some users will experience timeout issues with the Forward Historian. By updating the 6.x deployment to the latest from the `releases/6.x` branch, and restarting the platform and forwarder, this issue can be resolved.

```
. env/bin/activate
./stop-volttron
git pull
git checkout releases/6.x
./start-volttron
vctl start <forward id or tag>
```

## 2.56 Troubleshooting

This section contains individual documents intended to help the user troubleshoot various platform components. For troubleshooting of individual agents and drivers please refer to the corresponding document for each.

### 2.56.1 RabbitMQ Troubleshooting

#### Check the status of the federation connection

```
$RABBITMQ_HOME/sbin/rabbitmqctl eval 'rabbit_federation_status:status().'
```

If everything is properly configured, then the status is set to *running*. If not look for the error status. Some of the typical errors are:

- a. **failed\_to\_connect\_using\_provided\_uris** - Check if RabbitMQ user is created in downstream server node. Refer to step 3-b of federation setup
- b. **unknown ca** - Check if the root CAs are copied to all the nodes correctly. Refer to step 2 of federation setup
- c. **no\_suitable\_auth\_mechanism** - Check if the AMPQ/S ports are correctly configured.

#### Check the status of the shovel connection

```
RABBITMQ_HOME/sbin/rabbitmqctl eval 'rabbit_shovel_status:status().'
```

If everything is properly configured, then the status is set to *running*. If not look for the error status. Some of the typical errors are:

- a. **failed\_to\_connect\_using\_provided\_uris** - Check if RabbitMQ user is created in subscriber node. Refer to step 3-b of shovel setup
- b. **unknown ca** - Check if the root CAs are copied to remote servers correctly. Refer to step 2 of shovel setup
- c. **no\_suitable\_auth\_mechanism** - Check if the AMPQ/S ports are correctly configured.

#### Check the RabbitMQ logs for any errors

```
tail -f <volttron source dir>/rabbitmq.log
```

#### Rabbitmq startup hangs

- a. Check for errors in the RabbitMQ log. There is a *rabbitmq.log* file in your VOLTTRON source directory that is a symbolic link to the RabbitMQ server logs.
- b. Check for errors in syslog (*/var/log/syslog* or */var/log/messages*)
- c. If there are no errors in either of the logs, restart the RabbitMQ server in foreground and see if there are any errors written on the console. Once you find the error you can kill the process by entering *Ctl+C*, fix the error and start rabbitmq again using *./start-rabbitmq* from VOLTTRON source directory.

```
./stop-volttron
./stop-rabbitmq
@RABBITMQ_HOME/sbin/rabbitmq-server
```

## SSL trouble shooting

There are few things that are essential for SSL certificates to work right.

- a. Please use a unique common-name for CA certificate for each VOLTTRON instance. This is configured under *certificate-data* in the *rabbitmq\_config.yml* or if no yml file is used while configuring a VOLTTRON single instance (using `vcfg rabbitmq single`). Certificate generated for agent will automatically get agent's VIP identity as the certificate's common-name
- b. The host name in the SSL certificate should match hostname used to access the server. For example, if the fully qualified domain name was configured in the *certificate-data*, you should use the fully qualified domain name to access RabbitMQ's management url.
- c. Check if your system time is correct especially if you are running virtual machines. If the system clock is not right, it could lead to SSL certificate errors

## DataMover troubleshooting

If output from *volttron.log* is not as expected check for `{ 'alert_key': 'historian_not_publishing' }` in the callee node's *volttron.log*. Most likely cause is the historian is not running properly or credentials between caller and callee nodes was not set properly.

## 2.57 Applications

These resources summarize the use of the sample applications that have been created by VOLTTRON users. For detailed information on these applications, refer to the report [Transactional Network Platform](#).

Note, as of VOLTTRON 4.0, applications are now in their own repository at: <https://github.com/VOLTTRON/volttron-applications>

### 2.57.1 Acquiring Third Party Agent Code

Add the volttron-applications repository under the volttron/applications directory by using following command:

```
git subtree add --prefix applications https://github.com/VOLTTRON/volttron-applications.git develop
--squash
```

## Passive Automated Fault Detection and Diagnostic Agent

The Passive Automated Fault Detection and Diagnostic (Passive AFDD) agent is used to identify problems in the operation and performance of air-handling units (AHUs) or packaged rooftop units (RTUs). Air-side economizers modulate controllable dampers to use outside air to cool instead of (or to supplement) mechanical cooling, when outdoor-air conditions are more favorable than the return-air conditions. Unfortunately, economizers often do not work properly, leading to increased energy use rather than saving energy. Common problems include incorrect control strategies, diverse types of damper linkage and actuator failures, and out-of-calibration sensors. These problems can be detected using sensor data that is normally used to control the system.

The Passive AFDD requires the following data fields to perform the fault detection and diagnostics:

- Outside-air temperature
- Return-air temperature
- Mixed-air temperature



- Outside-air damper position/signal
- Supply fan status
- Mechanical cooling status
- Heating status.

The AFDD supports both real-time data via a Modbus or BACnet device, or input of data from a csv style text document.

The following section describes how to configure the Passive AFDD agent, methods for data input (real-time data from a device or historical data in a comma separated value formatted text file), and launching the Passive AFDD agent.

Note: A proactive version of the Passive AFDD exists as a PNNL application (AFDDAgent). This application requires active control of the RTU for fault detection and diagnostics to occur. The Passive AFDD was created to allow more users a chance to run diagnostics on their HVAC equipment without the need to actively modify the controls of the system.

## Configuring the Passive AFDD Agent

Before launching the Passive AFDD agent, several parameters require configuration. The AFDD utilizes the same JSON style configuration file used by the Actuator, Listener, and Weather agents. The threshold parameters used for the fault detection algorithms are pre-configured and will work well for most RTUs or AHUs. Figure 1 shows an example configuration file for the AFDD agent.

The parameters boxed in black (in Figure 1) are the pre-configured fault detection thresholds; these do not require any modification to run the Passive AFDD agent. The parameters in the example configuration that are boxed in red will require user input. The following list describes each user configurable parameter and their possible values:

- **agentid** – This is the ID used when making schedule, set, or get requests to the Actuator agent; usually a string data type.
- **campus** – Campus name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type.
- **building** – Building name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type.
- **unit** – Device name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type. Note: The campus, building, and unit parameters are used to build the device path (campus/building/unit). The device path is used for communication on the message bus.
- **controller point names** – When using real-time communication, the Actuator agent identifies what registers or values to set or get by the point name you specify. This name must match the “Point Name” given in the Modbus registry file, as specified in VOLTRON Core Services.
- **aggregate\_data** – When using real-time data sampled at an interval of less than 1 hour or when inputting data via a csv file sampled at less than 1 hour intervals, set this flag to “1.” Value should be an integer or floating-point number (i.e., 1 or 1.0)
- **csv\_input** – Flag to indicate if inputting data from a csv text file. Set to “0” for use with real-time data from a device or “1” if data is input from a csv text file. It should be an integer or floating point number (i.e., 1 or 1.0)
- **EER** – Energy efficiency ratio for the AHU or RTU. It should be an integer or floating-point number (i.e., 10 or 10.0)
- **tonnage** – Cooling capacity of the AHU or RTU in tons of cooling. It should be an integer or floating-point number (i.e., 10 or 10.0)

- **economizer\_type** – This field indicates what type of economizer control is used. Set to “0” for differential dry-bulb control or to “1” for high limit dry-bulb control. It should be an integer or floating-point number.
- **high\_limit** – If the economizer is using high-limit dry-bulb control, this value indicates what the outside-air temperature high limit should be. The input should be floating-point number (i.e., 60.0)
- **matemp\_missing** – Flag used to indicate if the mixed-air temperature is missing for this system. If utilizing csv data input, simply set this flag to “1” and replace the mixed-air temperature column with discharge-air temperature data. If using real-time data input, change the field “mat\_point\_name” under Point Names section to the point name indicating the discharge-air temperature. It should be an integer or floating-point number (i.e., 1 or 1.0)
- **OAE6** – This section contains the schedule information for the AHU or RTU. The default is to indicate a 24-hour schedule for each day of the week. To modify this, change the numbers in the bracketed list next to the corresponding day with which you are making operation schedule modifications. For example: “Saturday”: [0,0] (This indicates the system is off on Saturdays).

```

{
  "agent": {
    "exec": "passiveafdd-0.1-py2.7.egg --config \"%c\" --sub \"%s\" --pub \"%p\""
  },
  "agentid": "afdd1",
  "campus": "campus1",
  "building": "building1",
  "unit": "device1",
  "smap_path": "datalogger/log/afdd1/campus1/building1/device1" , #/datalogger/log/your sMAP path here

  #[Controller point names]
  "oat_point_name": "OutsideAirTemp",
  "mat_point_name": "MixedAirTemp", #"DischargeAirTemp"
  "dat_point_name": "DischargeAirTemperature",
  "rat_point_name": "ReturnAirTemp",
  "damper_point_name": "Damper",
  "cool_call1_point_name": "CoolCall",
  "cool_cmd1_point_name": "CompressorStatus",
  "fan_status_point_name": "FanStatus",
  "heat_command1_point_name": "Heating",

  #[Input Variables]
  "aggregate_data": 1,
  "csv_input": 1,
  "EER": 10,
  "tonnage": 10
  "high_limit": 70,
  "economizer_type": 0,
  "matemp_missing": 0,

  #[oaf]
  "oaf_temp_threshold": 4.0,

  #[OAE1]
  "mat_low": 50,
  "mat_high": 90,
  "rat_low": 50,
  "rat_high": 90,
  "oat_low": 30,
  "oat_high": 120,

  #[OAE2]
  "oae2_damper_threshold": 30.0,
  "oae2_oaf_threshold": 0.25,

  #[OAE3]
  "damper_minimum": 20,

  #[OAE4]
  "minimum_oa": 0.1,
  "oae4_oaf_threshold": 0.25,

  #[OAE5]
  "oae5_oaf_threshold": 0.0,

  #[OAE6]
  "Sunday": [0,23], #this schedule is 24 hours
  "Monday": [0,23],
  "Tuesday": [0,23],
  "Wednesday": [0,23],
  "Thursday": [0,23],
  "Friday": [0,23],
  "Saturday": [0,23],
}

```

Figure 1. Example Passive AFDD Agent Configuration File

## Launching the Passive AFDD Agent

The Passive AFDD agent performs passive diagnostics on AHUs or RTUs, monitors and utilizes sensor data, but does not actively control the devices. Therefore, the agent does not require interaction with the Actuator agent. Steps for launching the agent are provided below.

In a terminal window, enter the following commands:

1. Run `pack_install` script on Passive AFDD agent:

```
$ . scripts/core/pack_install.sh applications/PassiveAFDD applications/PassiveAFDD/
↳passiveafdd.launch.json passive-afdd
```

Upon successful completion of this command, the terminal output will show the install directory, the agent UUID (unique identifier for an agent; the UUID shown in red is only an example and each instance of an agent will have a different UUID), and the agent name (blue text):

```
Installed /home/volttron-user/.volttron/packaged/passiveafdd-0.1-py2-none-any.whl as_
↳5df00517-6a4e-4283-8c70-5f0759713c64 passiveafdd-0.1
```

2. Start the agent:

```
$ vctl start --tag passive-afdd
```

3. Verify that the agent is running:

```
$ vctl status
$ tail -f volttron.log
```

If changes are made to the Passive AFDD agent's configuration file after the agent is launched, it is necessary to stop and reload the agent. In a terminal, enter the following commands:

```
$ vctl stop --tag passive-afdd
$ vctl remove --tag passive-afdd
```

Then re-build and start the updated agent.

When the AFDD agent is monitoring a device via the message bus, the agent relies on the periodic data published from the sMAP driver. The AFDD agent then aggregates this data each hour and performs the diagnostics on the average hourly data. The result is written to a csv text file, which is appended if the file already exists. This file is in a folder titled "Results" under the (`<project directory>/applications/pnml/PassiveAFDD/passiveafdd`) directory. Below is a key that describes how to interpret the diagnostic results:

Diagnostic Code	Code Message
AFDD-1 (Temperature Sensor Fault)	
20	No faults detected
21	Temperature sensor fault
22	Conditions not favorable for diagnostic
23	Mixed-air temperature outside of expected range
24	Return-air temperature outside of expected range
25	Outside-air temperature outside of expected range
27	Missing data necessary for fault detection
29	Unit is off (No Fault)
AFDD-2 (RTU Economizing When it Should)	
30	No faults detected

continue

Table 33 – continued from previous page

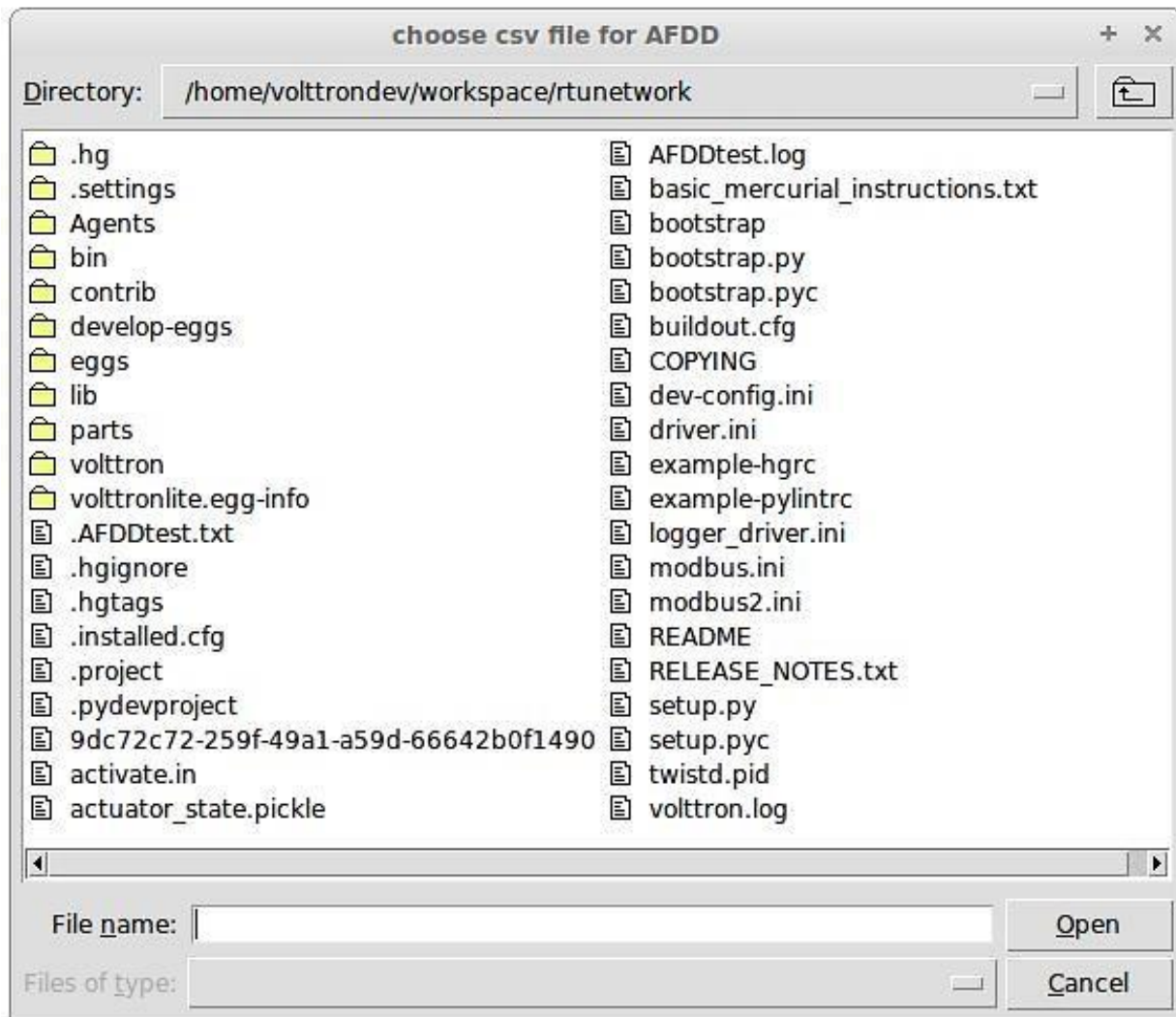
Diagnostic Code	Code Message
31	Unit is not currently cooling or conditions are not favorable for economizing
32	Insufficient outdoor air when economizing (Fault)
33	Outdoor-air damper is not fully open when the unit should be economizing
36	OAD is open but conditions were not favorable for OAF calculation (No Fault)
37	Missing data necessary for fault detection (No Fault)
38	OAD is open when economizing but OAF calculation led to an unexpected
39	Unit is off (No Fault)
AFDD-3 (Unit Economizing When it Should)	
40	No faults detected
41	Damper should be at minimum position but is not (Fault)
42	Damper is at minimum for ventilation (No Fault)
43	Conditions favorable for economizing (No Fault)
47	Missing data necessary for fault detection (No Fault)
49	Unit is off (No Fault)
AFDD-4 (Excess Outdoor-air Intake)	
50	No faults detected
51	Excessive outdoor-air intake
52	Damper is at minimum but conditions are not favorable for OAF calculation
53	Damper is not at minimum (Fault)
56	Unit should be economizing (No Fault)
57	Missing data necessary for fault detection (No Fault)
58	Damper is at minimum but OAF calculation led to an unexpected value (No
59	Unit is off (No Fault)
AFDD-5 (Insufficient Outdoor-air Ventilation)	
60	No faults detected
61	Insufficient outdoor-air intake (Fault)
62	Damper is at minimum but conditions are not favorable for OAF calculation
63	Damper is not at minimum when is should not be (Fault)
66	Unit should be economizing (No Fault)
67	Missing data necessary for fault detection (No Fault)
68	Damper is at minimum but conditions are not favorable for OAF calculation
69	Unit is off (No Fault)
AFDD-6 (Schedule)	
70	Unit is operating correctly based on input on/off time (No Fault)
71	Unit is operating at a time designated in schedule as “off” time
77	Missing data

### Launching the AFDD for CSV Data Input

When utilizing the AFDD agent and inputting data via a csv text file, set the **csv\_input** parameter, contained in the AFDD configuration file, to “1.”

- Launch the agent normally.
- A small file input box will appear. Navigate to the csv data file and select the csv file to input for the diagnostic.
- The result will be created for this RTU or AHU in the results folder described.

Figure 2 shows the dialog box that is used to input the csv data file.



**Figure 2 File Selection Dialog Box when Inputting Data in a csv File**

If “Cancel” is pushed on the file input dialog box, the AFDD will acknowledge that no file was selected. The Passive AFDD must be restarted to run the diagnostics. If a non-csv file is selected, the AFDD will acknowledge the file selected was not a csv file. The AFDD must be restarted to run the diagnostics.

Figure 3 shows a sample input data in a csv format. The header, or name for each column from the data input csv file used for analysis, should match the name given in the configuration file, as shown in Figure 1, boxed in red.

```
Timestamp,OutsideAirTemp,ReturnAirTemp,MixedAirTemp,CompressorStatus,HeatingStatus,FanStatus,Damper
5/19/2012 6:00,48.902,56.43727273,58.68472222,0,0,0,0
5/19/2012 7:00,51.12316667,59.47933333,59.58916667,0,0,0,0
5/19/2012 8:00,54.70866667,61.1625,64.34266667,0,0,0,0
```

**Figure 3 Sample of CSV Data for Passive AFDD Agent**

## The Demand Response (DR) Agent

Many utilities around the country have or are considering implementing dynamic electrical pricing programs that use time-of-use (TOU) electrical rates. TOU electrical rates vary based on the demand for electricity. Critical peak pricing (CPP), also referred to as critical peak days or event days, is an electrical rate where utilities charge an increased price above normal pricing for peak hours on the CPP day. CPP times coincide with peak demand on the utility; these CPP events are generally called between 5 to 15 times per year and occur when the electrical demand is high and the supply is low. Customers on a flat standard rate who enroll in a peak time rebate program receive rebates for using less electricity when a utility calls for a peak time event. Most CPP events occur during the summer season on very hot days. The initial implementation of the DR agent addresses CPP events where the RTU would normally be cooling. This implementation can be extended to handle CPP events for heating during the winter season as well. This implementation of the DR agent is specific to the CPP, but it can easily be modified to work with other incentive signals (real-time pricing, day ahead, etc.).

The main goal of the building owner/operator is to minimize the electricity consumption during peak summer periods on a CPP day. To accomplish that goal, the DR agent performs three distinct functions:

- **Step 1 – Pre-Cooling:** Prior to the CPP event period, the cooling and heating (to ensure the RTU is not driven into a heating mode) set points are reset lower to allow for pre-cooling. This step allows the RTU to cool the building below its normal cooling set point while the electrical rates are still low (compared to CPP events). The cooling set point is typically lowered between 3 and 5°F below the normal. Rather than change the set point to a value that is 3 to 5°F below the normal all at once, the set point is gradually lowered over a period of time.
- **Step 2 – Event:** During the CPP event, the cooling set point is raised to a value that is 4 to 5°F above the normal, the damper is commanded to a position that is slightly below the normal minimum (half of the normal minimum), the fan speed is slightly reduced (by 10% to 20% of the normal speed, if the unit has a variable-frequency drive (VFD)), and the second stage cooling differential (time delay between stage one and stage two cooling) is increased (by few degrees, if the unit has multiple stages). The modifications to the normal set points during the CPP event for the fan speed, minimum damper position, cooling set point, and second stage cooling differential are user adjustable. These steps will reduce the electrical consumption during the CPP event. The pre-cooling actions taken in step 1 will allow the temperature to slowly float up to the CPP cooling temperature set point and reduce occupant discomfort during the attempt to shed load.
- **Step 3 – Post-Event:** The DR agent will begin to return the RTU to normal operations by changing the cooling and heating set points to their normal values. Again, rather than changing the set point in one step, the set point is changed gradually over a period of time to avoid the “rebound” effect (a spike in energy consumption after the CPP event when RTU operations are returning to normal).

The following section will detail how to configure and launch the DR agent.



## Configuring DR Agent

Before launching the DR agent, several parameters require configuration. The DR utilizes the same JSON style configuration file that the Actuator, Listener, and Weather agent use. A notable limitation of the DR agent is that the DR agent requires active control of an RTU/AHU. The DR agent modifies set points on the controller or thermostat to reduce electrical consumption during a CPP event. The DR agent must be able to **set** certain values on the RTU/AHU controller or thermostat via the Actuator agent. Figure 4 shows a sample configuration file for the DR agent:

```
{
  "agent": {
    "exec": "DemandResponseagent-0.1-py2.7.egg --config \"%c\" --sub \"%s\" --pub \"%p\""
  },
  #Agent Parameters
  "agentid": "DRAGENT1", #Agent ID used by actuator agent for control of RTU

  "campus": "campus",    #campus name as known by Volttron

  "building": "building", #Building name as known by Volttron

  "unit": "device",      #RTU/Controller name as known by Volttron

  "smap_path": "datalogger/log/testing/campus/device" , #/datalogger/log/your path here

  #Catalyst Controller point names
  "cooling_stpt": "CoolingTemperatureStPt", # second value in quotes in name from your controller

  "heating_stpt": "HeatingTemperatureStPt",

  "min_damper_stpt": "MinimumDamperPositionStPt",

  "cooling_stage_diff": "CoolingStageDifferential",

  "cooling_fan_sp1": "CoolSupplyFanSpeed1",

  "cooling_fan_sp2": "CoolSupplyFanSpeed2",

  "override_command": "VoltronPBStatus",

  "occupied_status": "Occupied",

  "space_temp": "SpaceTemp",

  "volttron_flag": "VoltronFlag",
```



```

#DR cooling Set Points
"csp_pre": 65.0,    #Pre-cooling zone temperature set point

"csp_cpp": 80.0,    #CPP event zone temperature set point

#Normal set points
"normal_firststage_fanspeed": 90.0,

"normal_secondstage_fanspeed": 90.0,

"normal_damper_stpt": 5.0,

"normal_coolingstpt": 74.0,

"normal_heatingstpt": 67.0,

#DR Parameters
"fan_reduction": 0.1, #fractional reduction 10% = 0.1

"damper_cpp": 0, #minimum damper command during CPP event

"timestep_length": 900, #number of seconds between CSP modifications in Pre and After event (default 900 sec. = 15 min.)

"max_precool_hours": 5, #maximum pre-cooling window in hours

"building_thermal_constant": 4.0, #Building thermal constant F/hr

"cooling_stage_differential": 1.0,

"Schedule": [1,1,1,1,1,1,1] #[Mon, Tue, Wed, Thu, Fri, Sat, Sun]
}

```

**Figure 4 Example Configuration File for the DR Agent**

The parameters boxed in black (Figure 4) are the demand response parameters; these may require modification to ensure the DR agent and corresponding CPP event are executed as one desires. The parameters in the example configuration that are boxed in red are the controller or thermostat points, as specified in the Modbus or BACnet (depending on what communication protocol your device uses) registry file, that the DR agent will set via the Actuator agent. These device points must be writeable, and configured as such, in the registry (Modbus or BACnet) file. The following list describes each user configurable parameter:

- **agentid** - This is the ID used when making schedule, set, or get requests to the Actuator agent; usually a string data type.
- **campus** - Campus name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type.
- **building** - Building name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type.
- **unit** - Device name as configured in the sMAP driver. This parameter builds the device path that allows the Actuator agent to set and get values on the device; usually a string data type. Note: The campus, building, and unit parameters are used to build the device path (campus/building/unit). The device path is used for communication on the message bus.
- **csp\_pre** - Pre-cooling space cooling temperature set point.
- **csp\_cpp** - CPP event space cooling temperature set point.
- **normal\_firststage\_fanspeed** - Normal operations, first stage fan speed set point.
- **normal\_secondstage\_fanspeed** - Normal operations, second stage fan speed set point.
- **normal\_damper\_stpt** - Normal operations, minimum outdoor-air damper set point.
- **normal\_coolingstpt** - Normal operations, space cooling temperature set point.
- **normal\_heatingstpt** - Normal operations, space heating temperature set point.

- **fan\_reduction** - Fractional reduction in fan speeds during CPP event (default: 0.1-10%).
- **damper\_cpp** - CPP event, minimum outdoor-air damper set point.
- **max\_precool\_hours** - Maximum allotted time for pre-cooling, in hours.
- **cooling\_stage\_differential** - Difference in actual space temperature and set-point temperature before second stage cooling is activated.
- **schedule** - Day of week occupancy schedule “0” indicate unoccupied day and “1” indicate occupied day (e.g., [1,1,1,1,1,1,1] = [Mon, Tue, Wed, Thu, Fri, Sat, Sun]).

## OpenADR (Open Automated Demand Response)

Open Automated Demand Response (OpenADR) is an open and standardized way for electricity providers and system operators to communicate DR signals with each other and with their customers using a common language over any existing IP-based communications network, such as the Internet. Lawrence Berkeley National Laboratory created an agent to receive DR signals from an external source (e.g., OpenADR server) and publish this information on the message bus. The DR agent subscribes to the OpenADR topic and utilizes the contents of this message to coordinate the CPP event.

The OpenADR signal is formatted as follows:

```
'openadr/event',{'Content-Type': ['application/json'], 'requesterID': 'openadragent'},
→ {'status': 'near',
'start_at': '2013-6-15 14:00:00', 'end_at': '2013-10-15 18:00:00', 'mod_num': 0, 'id':
'18455630-a5c4-4e4a-9d53-b3cf989ccf1b', 'signals': 'null'}
```

The red text in the signal is the topic associated with CPP events that are published on the message bus. The text in dark blue is the message; this contains the relevant information on the CPP event for use by the DR agent.

If one desires to test the behavior of a device when responding to a DR event, such an event can be simulated by manually publishing a DR signal on the message bus. From the base VOLTTRON directory, in a terminal window, enter the following commands:

1. Activate project:

```
$ source env/bin/activate
```

2. Start Python interpreter:

```
$ python
```

3. Import VOLTTRON modules:

```
$ from volttron.platform.vip.agent import Core, Agent
```

4. Import needed Python library:

```
$ import gevent
```

5. Instantiate agent (agent will publish OpenADR message):

```
$ agent = Agent(address='ipc://@/home/volttron-user/.volttron/run/vip.socket')
```

6. Ensure the setup portion of the agent run loop is executed:

```
$ gevent.spawn(agent.core.run).join(0)
```

#### 7. Publish simulated OpenADR message:

```
$ agent.vip.pubsub.publish(peer='pubsub', topic='openadr/event', headers={},
message={'id': 'event_id', 'status': 'active', 'start_at': '10-30-15 15:00', 'end_at':
↪ '10-30-15
18:00'})
```

To cancel this event, enter the following command:

```
$ agent.vip.pubsub.publish(peer='pubsub', topic='openadr/event', headers={}, message={
↪ 'id':
'event_id', 'status': 'cancelled', 'start_at': '10-30-15 15:00', 'end_at': '10-30-15_
↪ 18:00'})
```

The DR agent will use the most current signal for a given day. This allows utilities/OpenADR to modify the signal up to the time prescribed for pre-cooling.

## DR Agent Output to sMAP

After the DR agent has been configured, the agent can be launched. To launch the DR agent from the base VOLTTRON directory, enter the following commands in a terminal window:

#### 1. Run *pack\_install* script on DR agent:

```
$ . scripts/core/pack_install.sh applications/DemandResponseAgent
applications/DemandResponseAgent/demandresponse.launch.json dr-agent
```

Upon successful completion of this command, the terminal output will show the install directory, the agent UUID (unique identifier for an agent; the UUID shown in red is only an example and each instance of an agent will have a different UUID) and the agent name (blue text):

```
Installed
/home/volttron-user/.volttron/packaged/DemandResponseagent-0.1-py2-none-
any.whlas 5b1706d6-b71d-4045-86a3-8be5c85ce801
DemandResponseagent-0.1
```

#### 2. Start the agent:

```
$ vctl start --tag dr-agent
```

#### 3. Verify that agent is running:

```
$ vctl status
$ tail -f volttron.log
```

If changes are made to the DR agent's configuration file after the agent is launched, it is necessary to stop and reload the agent. In a terminal, enter the following commands:

```
$ vctl stop --tag dr-agent
$ vctl remove --tag dr-agent
```

Then re-build and start the updated agent.

## 2.57.2 Simulation Subsystem

The simulation subsystem includes a set of device simulators and a clock that can run faster (or slower) than real time. It can be used to test VOLTTRON agents or drivers. It could be particularly useful when simulating multi-agent and/or multi-driver scenarios.

The source code for the agents and drivers comprising this subsystem resides in the <https://github.com/VOLTTRON/volttron-applications> github repository.

This subsystem is designed to be extended easily. Its initial delivery includes a set of simulated energy devices that report status primarily in terms of power (kilowatts) produced and consumed. It could easily be adapted, though, to simulate and report data for devices that produce, consume and manage resources other than energy.

Three agents work together to run a simulation:

1. **SimulationClockAgent.** This agent manages the simulation's clock. After it has been supplied with a start time, a stop time, and a clock-speed multiplier, and it has been asked to start a simulation, it provides the current simulated time in response to requests. If no stop time has been provided, the SimulationClockAgent continues to manage the simulation clock until the agent is stopped. If no clock-speed multiplier has been provided, the simulation clock runs at normal wall-clock speed.
2. **SimulationDriverAgent.** Like PlatformDriverAgent, this agent is a front-end manager for device drivers. It handles `get_point/set_point` requests from other agents, and it periodically "scrapes" and publishes each driver's points. If a device driver has been built to run under PlatformDriverAgent, with a few minor modifications (detailed below) it can be adapted to run under SimulationDriverAgent.
3. **SimulationAgent.** This agent configures, starts, and reports on a simulation. It furnishes a variety of configuration parameters to the other simulation agents, starts the clock, subscribes to scraped driver points, and generates a CSV output file.

Four device drivers have been provided:

1. **storage (simstorage).** The storage driver simulates an energy storage device (i.e., a battery). When it receives a power dispatch value (positive to charge the battery, negative to discharge it), it adjusts its charging behavior accordingly. Its reported power doesn't necessarily match the dispatch value, since (like an actual battery) it stays within configured max-charge/max-discharge limits, and its power dwindles as its state of charge approaches a full or empty state.
2. **pv (simpv).** The PV driver simulates a photovoltaic array (solar panels), reporting the quantity of solar power produced. Solar power is calculated as a function of (simulated) time, using a data file of incident-sunlight metrics. A year's worth of solar data has been provided as a sample resource.
3. **load (simload).** The load driver simulates the behavior of a power consumer such as a building, reporting the quantity of power consumed. It gets its power metrics as a function of (simulated) time from a data file of power readings. A year's worth of building-load data has been provided as a sample resource.
4. **meter (simmeter).** The meter driver simulates the behavior of a circuit's power meter. This driver, as delivered, is actually just a shell of a simulated device. It's able to report power as a function of (simulated) time, but it has no built-in default logic for deciding what particular power metrics to report.

## Linux Installation

The following steps describe how to set up and run a simulation. They assume that VOLTTTRON / voltttron and VOLTTTRON / voltttron-applications repositories have been downloaded from github, and that Linux shell variables \$VOLTTTRON\_ROOT and \$VOLTTTRON\_APPLICATIONS\_ROOT point at the root directories of these repositories.

First, create a soft link to the applications directory from the voltttron directory, if that hasn't been done already:

```
$ cd $VOLTTTRON_ROOT
$ ln -s $VOLTTTRON_APPLICATIONS_ROOT applications
```

With VOLTTTRON running, load each simulation driver's configuration into a "simulation.driver" config store:

```
$ export SIMULATION_DRIVER_ROOT=$VOLTTTRON_ROOT/applications/kisensum/Simulation/
↪SimulationDriverAgent

$ vctl config store simulation.driver simload.csv $SIMULATION_DRIVER_ROOT/simload.csv ↪
↪--csv
$ vctl config store simulation.driver devices/simload $SIMULATION_DRIVER_ROOT/simload.
↪config

$ vctl config store simulation.driver simmeter.csv $SIMULATION_DRIVER_ROOT/simmeter.
↪csv --csv
$ vctl config store simulation.driver devices/simmeter $SIMULATION_DRIVER_ROOT/
↪simmeter.config

$ vctl config store simulation.driver simpv.csv $SIMULATION_DRIVER_ROOT/simpv.csv --
↪csv
$ vctl config store simulation.driver devices/simpv $SIMULATION_DRIVER_ROOT/simpv.
↪config

$ vctl config store simulation.driver simstorage.csv $SIMULATION_DRIVER_ROOT/
↪simstorage.csv --csv
$ vctl config store simulation.driver devices/simstorage $SIMULATION_DRIVER_ROOT/
↪simstorage.config
```

Install and start each simulation agent:

```
$ export SIMULATION_ROOT=$VOLTTTRON_ROOT/applications/kisensum/Simulation
$ export VIP_SOCKET="ipc://$VOLTTTRON_HOME/run/vip.socket"

$ python scripts/install-agent.py \
  --vip-identity simulation.driver \
  --tag simulation.driver \
  --agent-source $SIMULATION_ROOT/SimulationDriverAgent \
  --config $SIMULATION_ROOT/SimulationDriverAgent/simulationdriver.config \
  --force \
  --start

$ python scripts/install-agent.py \
  --vip-identity simulationclock \
  --tag simulationclock \
  --agent-source $SIMULATION_ROOT/SimulationClockAgent \
  --config $SIMULATION_ROOT/SimulationClockAgent/simulationclock.config \
  --force \
  --start
```

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```
$ python scripts/install-agent.py \  
  --vip-identity simulationagent \  
  --tag          simulationagent \  
  --agent-source $SIMULATION_ROOT/SimulationAgent \  
  --config       $SIMULATION_ROOT/SimulationAgent/simulationagent.config \  
  --force \  
  --start
```

## **SimulationAgent Configuration Parameters**

This section describes SimulationAgent’s configurable parameters. Each of these has a default value and behavior, allowing the simulation to be run “out of the box” without configuring any parameters.

Type	Param Name	Data Type	Default	Comments
General	agent_id	str	simulation	
General	heartbeat_period	int sec	5	
General	sim_driver_list	list of str	[simload, simmeter, simpv, simstorage]	Allowed keywords are simload, simmeter, simpv, simstorage.
Clock	sim_start	date- time str	2017-02-02 13:00:00	
Clock	sim_end	date- time str	None	If None, sim doesn't stop.
Clock	sim_speed	float sec	180.0	This is a multiplier, e.g. 1 sec actual time = 180 sec sim time.
Load	load_timestamp_column_header	str	actual_date	
Load	load_power_column_header	str	load_kw	
Load	load_data_frequency	int min	15	
Load	load_data_year	str	2015	
Load	load_csv_file_path	str	~/repos/volttron-applications/kisensum/Simulation/SimulationAgent/data/load_and_pv.csv	~ and shell variables in the pathname will be expanded. The file must exist.
PV	pv_panel_area	float m2	50.0	
PV	pv_efficiency	float 0.0- 1.0	0.75	
PV	pv_data_frequency	int min	30	
PV	pv_data_year	str	2015	
PV	pv_csv_file_path	str	~/repos/volttron-applications/kisensum/Simulation/SimulationAgent/data/nrel_pv_readings.csv	~ and shell variables in the pathname will be expanded. The file must exist.
Storage	storage_soc_kwh	float kWh	30.0	
Storage	storage_max_soc_kwh	float kWh	50.0	
Storage	storage_max_charge_kw	float kW	15.0	
Storage	storage_max_discharge_kw	float kW	12.0	
Storage	storage_reduced_charge_threshold	float 0.0- 1.0	0.80	Charging will be reduced when SOC % > this value.
Storage	storage_reduced_discharge_soc_threshold	float 0.0- 1.0	0.20	Discharging will be reduced when SOC % < this value.
Dispatch	storage_setpoint_rule	str key- word	oscillation	See below.
Dispatch	positive_dispatch_kw	float kW >= 0.0	15.0	
Dispatch	negative_dispatch_kw	float kW <=	-15.0	

The **oscillation** setpoint rule slowly oscillates between charging and discharging based on the storage device's state of charge (SOC):

```
If SOC < (`go_positive_if_below` * `storage_max_soc_kwh`):
    dispatch power = `positive_dispatch_kw`

If SOC > (`go_negative_if_above` * `storage_max_soc_kwh`)
    dispatch power = `negative_dispatch_kw`

Otherwise:
    dispatch power is unchanged from its previous value.
```

The **alternate** setpoint rule is used when `storage_setpoint_rule` has been configured with any value other than **oscillation**. It simply charges at the dispatched charging value (subject to the constraints of the other parameters, e.g. `storage_max_discharge_kw`):

```
dispatch power = `positive_dispatch_kw`
```

## Driver Parameters and Points

### Load Driver

The load driver's parameters specify how to look up power metrics in its data file.

Type	Name	Data Type	Default	Comments
Param/Point	csv_file_path	string		This parameter must be supplied by the agent.
Param/Point	times-tamp_column_header	string	local_date	
Param/Point	power_column_header	string	load_kw	
Param/Point	data_frequency_min	int	15	
Param/Point	data_year	string	2015	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		



## Meter Driver

Type	Name	Data Type	Default	Comments
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

## PV Driver

The PV driver's parameters specify how to look up sunlight metrics in its data file, and how to calculate the power generated from that sunlight.

Type	Name	Data Type	Default	Comments
Param/Point	csv_file_path	string		This parameter must be supplied by the agent.
Param/Point	max_power_kw	float	10.0	
Param/Point	panel_area	float	50.0	
Param/Point	efficiency	float	0.75	
Param/Point	data_frequency_min	int	30	
Param/Point	data_year	string	2015	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

## Storage Driver

The storage driver's parameters describe the device's power and SOC limits, its initial SOC, and the SOC thresholds at which charging and discharging start to be reduced as its SOC approaches a full or empty state. This reduced power is calculated as a straight-line reduction: charging power is reduced in a straight line from `reduced_charge_soc_threshold` to 100% SOC, and discharging power is reduced in a straight line from `reduced_discharge_soc_threshold` to 0% SOC.

Type	Name	Data Type	Default	Comments
Param/Point	max_charge_kw	float	15.0	
Param/Point	max_discharge_kw	float	15.0	
Param/Point	max_soc_kwh	float	50.0	
Param/Point	soc_kwh	float	25.0	
Param/Point	reduced_charge_soc_threshold	float	0.8	
Param/Point	reduced_discharge_soc_threshold	float	0.2	
Point	dispatch_kw	float	0.0	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

## Working with the Sample Data Files

The Load and PV simulation drivers report power readings that are based on metrics from sample data files. The software distribution includes sample Load and PV files containing at least a year's worth of building-load and sunlight data.

CSV files containing different data sets of load and PV data can be substituted by specifying their paths in Simulation-Agent's configuration, altering its other parameters if the file structures and/or contents are different.

### Load Data File

`load_and_pv.csv` contains building-load and PV power readings at 15-minute increments from 01/01/2014 - 12/31/2015. The data comes from a location in central Texas. The file's data columns are: `utc_date`, `local_date`, `time_offset`, `load_kw`, `pv_kw`. The load driver looks up the row with a matching `local_date` and returns its `load_kw` value.

Adjust the following SimulationAgent configuration parameters to change how load power is derived from the data file:

- Use `load_csv_file_path` to set the path of the sample data file
- Use `load_data_frequency_min` to set the frequency of the sample data
- Use `load_data_year` to set the year of the sample data
- Use `load_timestamp_column_header` to indicate the header name of the timestamp column
- Use `load_power_column_header` to indicate the header name of the power column

### PV Data File

`nrel_pv_readings.csv` contains irradiance data at 30-minute increments from 01/01/2015 - 12/31/2015, downloaded from NREL's National Solar Radiation Database, <https://nsrdb.nrel.gov>. The file's data columns are: `Year`, `Month`, `Day`, `Hour`, `Minute`, `DHI`, `DNI`, `Temperature`. The PV driver looks up the row with a matching date/time and uses its DHI (diffuse horizontal irradiance) to calculate the resulting solar power produced:

$$\text{power\_kw} = \text{irradiance} * \text{panel\_area} * \text{efficiency} / \text{elapsed\_time\_hrs}$$

Adjust the following SimulationAgent configuration parameters to change how solar power is derived from the data file:

- Use `pv_csv_file_path` to set the path of the sample data file
- Use `pv_data_frequency_min` to set the frequency of the sample data
- Use `pv_data_year` to set the year of the sample data
- Use `pv_panel_area` and `pv_efficiency` to indicate how to transform an irradiance measurement in `wh/m2` into a power reading in `kw`.

If a PV data file will be used that has a column structure which differs from the one in the supplied sample, an adjustment may need to be made to the `simpv` driver software.

## Running the Simulation

One way to monitor the simulation's progress is to look at debug trace in VOLTRON's log output, for example:

```
2017-05-01 15:05:42,815 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01_
↳15:05:42.815484 Initializing drivers
2017-05-01 15:05:42,815 (simulationagent-1.0 9635) simulation.agent DEBUG: 
↳Initializing Load: timestamp_column_header=local_date, power_column_header=load_kw,
↳data_frequency_min=15, data_year=2015, csv_file_path=/Users/robcalvert/repos/
↳volttron-applications/kisensum/Simulation/SimulationAgent/data/load_and_pv.csv
2017-05-01 15:05:42,823 (simulationagent-1.0 9635) simulation.agent DEBUG: 
↳Initializing PV: panel_area=50, efficiency=0.75, data_frequency_min=30, data_
↳year=2015, csv_file_path=/Users/robcalvert/repos/volttron-applications/kisensum/
↳Simulation/SimulationAgent/data/nrel_pv_readings.csv
2017-05-01 15:05:42,832 (simulationagent-1.0 9635) simulation.agent DEBUG: 
↳Initializing Storage: soc_kwh=30.0, max_soc_kwh=50.0, max_charge_kw=15.0, max_
↳discharge_kw=12.0, reduced_charge_soc_threshold = 0.8, reduced_discharge_soc_
↳threshold = 0.2
2017-05-01 15:05:42,844 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01_
↳15:05:42.842162 Started clock at sim time 2017-02-02 13:00:00, end at 2017-02-02_
↳16:00:00, speed multiplier = 180.0
2017-05-01 15:05:57,861 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01_
↳15:05:57.842164 Reporting at sim time 2017-02-02 13:42:00
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simload/power_kw = 486.1
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simpv/power_kw = -0.975
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/dispatch_kw = 0.0
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/last_timestamp = 2017-02-02 13:33:00
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/power_kw = 0.0
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/soc_kwh = 30.0
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: net_power_
↳kw = 485.125
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: report_
↳time = 2017-02-02 13:42:00
2017-05-01 15:05:57,862 (simulationagent-1.0 9635) simulation.agent DEBUG: 
↳Setting storage dispatch to 15.0 kW
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01_
↳15:06:12.869471 Reporting at sim time 2017-02-02 14:30:00
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simload/power_kw = 467.5
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simpv/power_kw = -5.925
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/dispatch_kw = 15.0
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/last_timestamp = 2017-02-02 14:27:00
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/power_kw = 15.0
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/soc_kwh = 43.5
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: net_power_
↳kw = 476.575
2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG: report_
↳time = 2017-02-02 14:30:00
```

(continues on next page)

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```

2017-05-01 15:06:12,901 (simulationagent-1.0 9635) simulation.agent DEBUG:
↳Setting storage dispatch to 15.0 kW
2017-05-01 15:06:27,931 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01
↳15:06:27.907951 Reporting at sim time 2017-02-02 15:15:00
2017-05-01 15:06:27,931 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simload/power_kw = 474.2
2017-05-01 15:06:27,931 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simpv/power_kw = -11.7
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/dispatch_kw = 15.0
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/last_timestamp = 2017-02-02 15:03:00
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/power_kw = 5.362
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/soc_kwh = 48.033
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: net_power_
↳kw = 467.862
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG: report_
↳time = 2017-02-02 15:15:00
2017-05-01 15:06:27,932 (simulationagent-1.0 9635) simulation.agent DEBUG:
↳Setting storage dispatch to -15.0 kW
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: 2017-05-01
↳15:06:42.939181 Reporting at sim time 2017-02-02 16:00:00
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simload/power_kw = 469.5
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simpv/power_kw = -9.375
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/dispatch_kw = -15.0
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/last_timestamp = 2017-02-02 15:57:00
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/power_kw = -12.0
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: devices/
↳simstorage/soc_kwh = 37.233
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: net_power_
↳kw = 448.125
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG: report_
↳time = 2017-02-02 16:00:00
2017-05-01 15:06:42,971 (simulationagent-1.0 9635) simulation.agent DEBUG:
↳Setting storage dispatch to -15.0 kW
2017-05-01 15:06:58,001 (simulationagent-1.0 9635) simulation.agent DEBUG: The
↳simulation has ended.

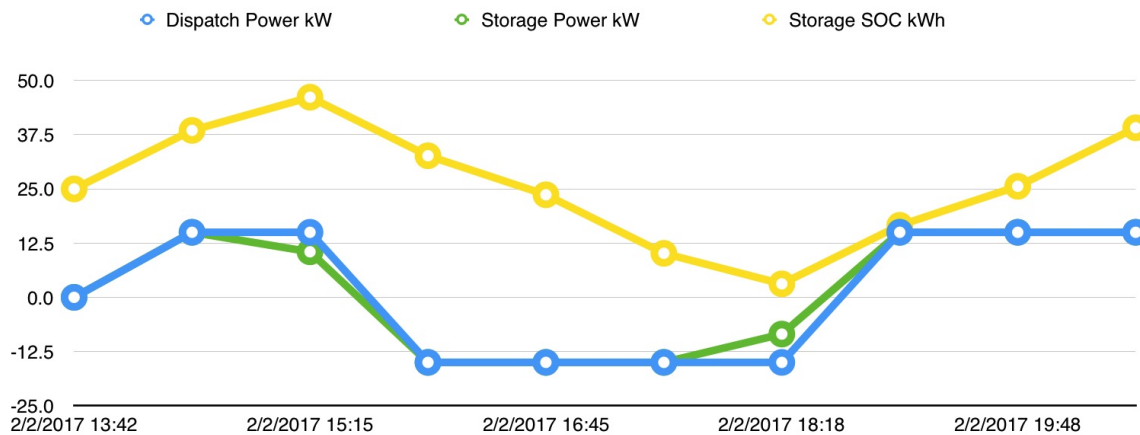
```

## Report Output

The SimulationAgent also writes a CSV output file so that simulation results can be reported by spreadsheets, for example this graph of the simulated storage device following an oscillating dispatch:

Simulation Output

Time	Dispatch Power kW	Storage Power kW	Storage SOC kWh	PV Power kW	Net Power kW	Load Power kW
2/2/2017 13:42	0.0	0.0	25.0	-1.0	485.1	486.1
2/2/2017 14:30	15.0	15.0	38.5	-5.9	476.6	467.5
2/2/2017 15:15	15.0	10.5	46.2	-11.7	473.0	474.2
2/2/2017 16:00	-15.0	-15.0	32.7	-9.4	445.1	469.5
2/2/2017 16:45	-15.0	-15.0	23.7	-14.7	473.6	503.3
2/2/2017 17:33	-15.0	-15.0	10.1	-16.1	475.5	506.5
2/2/2017 18:18	-15.0	-8.5	3.1	-18.5	439.8	466.8
2/2/2017 19:03	15.0	15.0	16.6	-18.3	476.8	480.1
2/2/2017 19:48	15.0	15.0	25.6	-21.8	460.6	467.4
2/2/2017 20:33	15.0	15.0	39.1	-19.8	434.1	438.9



## Using the Simulation Framework to Test a Driver

If you're developing a VOLTTRON driver, and you intend to add it to the drivers managed by PlatformDriverAgent, then with a few tweaks, you can adapt it so that it's testable from this simulation framework.

As with drivers under PlatformDriverAgent, your driver should be in a .py module that implements a Register class and an Interface class. In order to work within the simulation framework, simulation drivers need to be adjusted as follows:

- Place the module in the interfaces directory under SimulationDriverAgent.
- The module's Register class should inherit from SimulationRegister.
- The module's Interface class should inherit from SimulationInterface.
- If the driver has logic that depends on time, get the simulated time by calling `self.sim_time()`.

Add files with your driver's config and point definitions, and load them into the config store:

```
$ vctl config store simulation.driver \
    yourdriver.csv \
    $VOLTTRON_ROOT/applications/kisensum/Simulation/SimulationDriverAgent/yourdriver.
↪csv --csv
$ vctl config store simulation.driver \
    devices/yourdriver \
    $VOLTTRON_ROOT/applications/kisensum/Simulation/SimulationDriverAgent/yourdriver.
↪config
```

To manage your driver from the SimulationAgent, first add the driver to the `sim_driver_list` in that agent's config:

```
"sim_driver_list": ["simload", "simpv", "simstorage", "yourdriver"]
```

Then, if you choose, you can also revise SimulationAgent's config and logic to scrape and report your driver's points, and/or send RPC requests to your driver.

### For Further Information

If you have comments or questions about this simulation support, please contact Rob Calvert at Kisensum, Inc.:

- (github) @rob-calvert
- (email) [rob@kisensum.com](mailto:rob@kisensum.com)

## 2.57.3 Open ADR

OpenADR (Automated Demand Response) is a standard for alerting and responding to the need to adjust electric power consumption in response to fluctuations in grid demand. OpenADR communications are conducted between Virtual Top Nodes (VTNs) and Virtual End Nodes (VENs).

In this implementation, a VOLTTRON agent, OpenADRVenAgent, is made available as a VOLTTRON service. It acts as a VEN, communicating with its VTN via EiEvent and EiReport services in conformance with a subset of the OpenADR 2.0b specification.

A VTN server has also been implemented, with source code in the `kisensum/openadr` folder of the `volttron-applications` git repository. As has been described below, it communicates with the VEN and provides a web user interface for defining and reporting on Open ADR events.

The OpenADR 2.0b specification (<http://www.openadr.org/specification>) is available from the OpenADR Alliance. This implementation also generally follows the DR program characteristics of the Capacity Program described in Section 9.2 of the OpenADR Program Guide ([http://www.openadr.org/assets/openadr\\_drprogramguide\\_v1.0.pdf](http://www.openadr.org/assets/openadr_drprogramguide_v1.0.pdf)).

The OpenADR Capacity Bidding program relies on a pre-committed agreement about the VEN's load shed capacity. This agreement is reached in a bidding process transacted outside of the OpenADR interaction, typically with a long-term scope, perhaps a month or longer. The VTN can "call an event," indicating that a load-shed event should occur in conformance with this agreement. The VTN indicates the level of load shedding desired, when the event should occur, and for how long. The VEN responds with an "optIn" acknowledgment. (It can also "optOut," but since it has been pre-committed, an "optOut" may incur penalties.)

## Reference Application

This reference application for VOLTTTRON's OpenADR Virtual End Node (VEN) and its Simulation Subsystem demonstrates interactions between the VOLTTTRON VEN agent and simulated devices. It employs a Virtual Top Node (VTN) server, demonstrating the full range of interaction and communication in a VOLTTTRON implementation of the OpenADR (Automated Demand Response) standard.

The simulation subsystem, described in more detail in *Simulated Subsystem*, includes a set of device simulators and a clock that can run faster (or slower) than real time (using ReferenceApp's default configuration, the clock runs at normal speed).

Eight VOLTTTRON agents work together to run this simulation:

1. **ReferenceAppAgent.** This agent configures, starts, and reports on a simulation. It furnishes a variety of configuration parameters to the other simulation agents, starts the clock, subscribes to scraped driver points, and generates a CSV output file. The ReferenceApp also serves as the mediator between the simulated device drivers and the VEN, adjusting driver behavior (particularly the behavior of the "simstorage" battery) while an OpenADR event is in progress, and aggregating and relaying relevant driver metrics to the VEN for reporting to the VTN.
2. **SimulationClockAgent.** This agent manages the simulation's clock. After it has been supplied with a start time, a stop time, and a clock-speed multiplier, and it has been asked to start a simulation, it provides the current simulated time in response to requests. If no stop time has been provided (this is the default behavior while the ReferenceApp is managing the clock), the SimulationClockAgent runs the simulation until the agent is stopped. If no clock-speed multiplier has been provided, the simulation clock runs at normal wallclock speed.
3. **SimulationDriverAgent.** Like PlatformDriverAgent, this agent is a front-end manager for device drivers. It handles get\_point/set\_point requests from other agents, and it periodically "scrapes" and publishes each driver's points. If a device driver has been built to run under PlatformDriverAgent, with a few minor modifications (detailed below) it can be adapted to run under SimulationDriverAgent.
4. **ActuatorAgent.** This agent manages write access to device drivers. Another agent may request a scheduled time period, called a Task, during which it controls a device.
5. **OpenADRVenAgent.** This agent implements an OpenADR Virtual End Node (VEN). It receives demand-response event notifications from a Virtual Top Node (VTN), making the event information available to the ReferenceAppAgent and other interested VOLTTTRON agents. It also reports metrics to the VTN based on information furnished by the ReferenceAppAgent.
6. **SQLHistorian.** This agent, a "platform historian," captures metrics reported by the simulated devices, storing them in a SQLite database.
7. **VolttronCentralPlatform.** This agent makes the platform historian's device metrics available for reporting by the VolttronCentralAgent.
8. **VolttronCentralAgent.** This agent manages a web user interface that can produce graphical displays of the simulated device metrics captured by the SQLHistorian.

Three simulated device drivers are used:

1. **storage (simstorage).** The storage driver simulates an energy storage device (i.e., a battery). When it receives a power dispatch value (positive to charge the battery, negative to discharge it), it adjusts the storage unit's charging behavior accordingly. Its reported power doesn't necessarily match the dispatch value, since (like an actual battery) it stays within configured max-charge/max-discharge limits, and power dwindles as its state of charge approaches a full or empty state.
2. **pv (simpv).** The PV driver simulates a photovoltaic array (solar panels), reporting the quantity of solar power produced. Solar power is calculated as a function of (simulated) time, using a data file of incident-sunlight metrics. A year's worth of solar data has been provided as a sample resource.

3. **load (simload).** The load driver simulates the behavior of a power consumer such as a building, reporting the quantity of power consumed. It gets its power metrics as a function of (simulated) time from a data file of power readings. A year's worth of building-load data has been provided as a sample resource.

## Linux Installation

The following steps describe how to set up and run a simulation. They assume that the `VOLTTRON` / `volttron` and `VOLTTRON` / `volttron-applications` repositories have been downloaded from github.

Installing and running a simulation is walked through in the Jupyter notebook in `$VOLTTRON_ROOT/examples/JupyterNotebooks/ReferenceAppAgent.ipynb`. In order to run this notebook, install Jupyter and start the Jupyter server:

```
$ cd $VOLTTRON_ROOT
$ source env/bin/activate
$ pip install jupyter
$ jupyter notebook
```

By default, a browser will open with the Jupyter Notebook dashboard at <http://localhost:8888>. Run the notebook by navigating in the Jupyter Notebook dashboard to <http://localhost:8888/tree/examples/JupyterNotebooks/ReferenceAppAgent.ipynb>.

## ReferenceAppAgent Configuration Parameters

This section describes ReferenceAppAgents's configurable parameters. Each of these has a default value and behavior, allowing the simulation to be run "out of the box" without configuring any parameters.

Type	Param Name	Data Type	Default
General	agent_id	str	reference_app
General	heartbeat_period	int sec	5
General	sim_driver_list	list of str	[simload, simpv, simstorage]
General	opt_type	str	optIn
General	report_interval_secs	int sec	30
General	baseline_power_kw	int kw	500
Clock	sim_start	datetime str	2017-04-30 13:00:00
Clock	sim_end	datetime str	None
Clock	sim_speed	float sec	1.0
Load	load_timestamp_column_header	str	local_date
Load	load_power_column_header	str	load_kw
Load	load_data_frequency_min	int min	15
Load	load_data_year	str	2015
Load	load_csv_file_path	str	~/repos/volttron-applications/kisensum/ ReferenceAppA
PV	pv_panel_area	float m2	1000.0
PV	pv_efficiency	float 0.0-1.0	0.75
PV	pv_data_frequency_min	int min	30
PV	pv_data_year	str	2015
PV	pv_csv_file_path	str	~/repos/volttron-applications/kisensum/ ReferenceAppA
Storage	storage_soc_kwh	float kWh	450.0
Storage	storage_max_soc_kwh	float kWh	500.0
Storage	storage_max_charge_kw	float kW	150.0
Storage	storage_max_discharge_kw	float kW	150.0



Type	Param Name	Data Type	Default
Storage	storage_reduced_charge_soc_threshold	float 0.0-1.0	0.80
Storage	storage_reduced_discharge_soc_threshold	float 0.0-1.0	0.20
Dispatch	positive_dispatch_kw	float kW >= 0.0	150.0
Dispatch	negative_dispatch_kw	float kW <= 0.0	-150.0
Dispatch	go_positive_if_below	float 0.0-1.0	0.1
Dispatch	go_negative_if_above	float 0.0-1.0	0.9
Report	report_interval	int seconds	15
Report	report_file_path	str	\$VOLTRON_HOME/run/simulation_out.csv
Actuator	actuator_id	str	simulation.actuator
VEN	venagent_id	str	venagent

## Driver Parameters and Points

### Load Driver

The load driver's parameters specify how to look up power metrics in its data file.

Type	Name	Data Type	Default	Comments
Param/Point	csv_file_path	string		This parameter must be supplied by the agent.
Param/Point	times-tamp_column_header	string	local_date	
Param/Point	power_column_header	string	load_kw	
Param/Point	data_frequency_min	int	15	
Param/Point	data_year	string	2015	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

### PV Driver

The PV driver's parameters specify how to look up sunlight metrics in its data file, and how to calculate the power generated from that sunlight.

Type	Name	Data Type	Default	Comments
Param/Point	csv_file_path	string		This parameter must be supplied by the agent.
Param/Point	max_power_kw	float	10.0	
Param/Point	panel_area	float	50.0	
Param/Point	efficiency	float	0.75	
Param/Point	data_frequency_min	int	30	
Param/Point	data_year	string	2015	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

## Storage Driver

The storage driver's parameters describe the device's power and SOC limits, its initial SOC, and the SOC thresholds at which charging and discharging start to be reduced as its SOC approaches a full or empty state. This reduced power is calculated as a straight-line reduction: charging power is reduced in a straight line from `reduced_charge_soc_threshold` to 100% SOC, and discharging power is reduced in a straight line from `reduced_discharge_soc_threshold` to 0% SOC.

Type	Name	Data Type	Default	Comments
Param/Point	max_charge_kw	float	15.0	
Param/Point	max_discharge_kw	float	15.0	
Param/Point	max_soc_kwh	float	50.0	
Param/Point	soc_kwh	float	25.0	
Param/Point	reduced_charge_soc_threshold	float	0.8	
Param/Point	reduced_discharge_soc_threshold	float	0.2	
Point	dispatch_kw	float	0.0	
Point	power_kw	float	0.0	
Point	last_timestamp	datetime		

## VEN Configuration

The VEN may be configured according to its documentation [here](#).

## Running the Simulation

There are three main ways to monitor the ReferenceApp simulation's progress.

One way is to look at debug trace in VOLTTRON's log output, for example:

```
2018-01-08 17:41:30,333 (referenceappagent-1.0 23842) referenceapp.agent DEBUG: 2018-
↳ 01-08 17:41:30.333260 Initializing drivers
2018-01-08 17:41:30,333 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Initializing Load: timestamp_column_header=local_date, power_column_header=load_
↳ kw, data_frequency_min=15, data_year=2015, csv_file_path=/home/ubuntu/repos/
↳ volttron-applications/kisensum/ReferenceAppAgent/data/load_and_pv.csv
2018-01-08 17:41:30,379 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Initializing PV: panel_area=50.0, efficiency=0.75, data_frequency_min=30, data_
↳ year=2015, csv_file_path=/home/ubuntu/repos/volttron-applications/kisensum/
↳ ReferenceAppAgent/data/nrel_pv_readings.csv
2018-01-08 17:41:30,423 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Initializing Storage: soc_kwh=25.0, max_soc_kwh=50.0, max_charge_kw=15.0, max_
↳ discharge_kw=15.0, reduced_charge_soc_threshold = 0.8, reduced_discharge_soc_
↳ threshold = 0.2
2018-01-08 17:41:32,331 (referenceappagent-1.0 23842) referenceapp.agent DEBUG: 2018-
↳ 01-08 17:41:32.328390 Reporting at sim time 2018-01-08 17:41:31.328388
2018-01-08 17:41:32,331 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ net_power_kw = 0
2018-01-08 17:41:32,331 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ report_time = 2018-01-08 17:41:31.328388
2018-01-08 17:41:32,338 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Setting storage dispatch to 15.0 kW
2018-01-08 17:41:46,577 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Received event: ID=4, status=far, start=2017-12-01 18:40:55+00:00, end=2017-12-02
↳ 18:37:56+00:00, opt_type=none, all params={"status": "far", "signals": (continues on next page)
↳ {"intervals": {"0": {"duration": "\PT23H57M1S", "uid": "\0", "payloads\
↳ ": {}}}, "currentLevel": null, "signalID": null}}, "event_id": "4", "start_time
714: "2017-12-01 18:40:55+00:00", "creation_time": "2018-01-08 17:41:Chapter 2." Features
↳ type": "none", "priority": 1, "end_time": "2017-12-02 18:37:56+00:00"}
```

(continued from previous page)

```

2018-01-08 17:41:46,577 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Sending an optIn response for event ID 4
2018-01-08 17:41:46,583 (referenceappagent-1.0 23842) referenceapp.agent DEBUG: 2018-
↳ 01-08 17:41:46.576130 Reporting at sim time 2018-01-08 17:41:46.328388
2018-01-08 17:41:46,583 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simload/power_kw = 519.3
2018-01-08 17:41:46,583 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simpv/power_kw = -17.175
2018-01-08 17:41:46,583 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/dispatch_kw = 15.0
2018-01-08 17:41:46,584 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/power_kw = 15.0
2018-01-08 17:41:46,584 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/soc_kwh = 25.025
2018-01-08 17:41:46,584 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ net_power_kw = 49.755
2018-01-08 17:41:46,584 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ report_time = 2018-01-08 17:41:46.328388
2018-01-08 17:41:46,596 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Setting storage dispatch to 15.0 kW
2018-01-08 17:41:48,617 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Received event: ID=4, status=completed, start=2017-12-01 18:40:55+00:00, end=2017-
↳ 12-02 18:37:56+00:00, opt_type=optIn, all params={"status": "completed", "signals":
↳ {"\"null\": {\"intervals\": {\"0\": {\"duration\": \"PT23H57M1S\", \"uid\": \"0\", \"
↳ payloads\": {}}}, \"currentLevel\": null, \"signalID\": null}}\", \"event_id\": \"4\",
↳ \"start_time\": \"2017-12-01 18:40:55+00:00\", \"creation_time\": \"2018-01-08 17:41:45.
↳ 774548\", \"opt_type\": \"optIn\", \"priority\": 1, \"end_time\": \"2017-12-02 18:37:56+00:00
↳ \"}
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG: 2018-
↳ 01-08 17:42:59.559264 Reporting at sim time 2018-01-08 17:42:59.328388
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simload/power_kw = 519.3
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simpv/power_kw = -17.175
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/dispatch_kw = 15.0
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/power_kw = 15.0
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/soc_kwh = 25.238
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ net_power_kw = 49.755
2018-01-08 17:42:59,563 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ report_time = 2018-01-08 17:42:59.328388
2018-01-08 17:42:59,578 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Setting storage dispatch to -1.05158333333 kW
2018-01-08 17:43:01,596 (referenceappagent-1.0 23842) referenceapp.agent DEBUG: 2018-
↳ 01-08 17:43:01.589877 Reporting at sim time 2018-01-08 17:43:01.328388
2018-01-08 17:43:01,596 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simload/power_kw = 519.3
2018-01-08 17:43:01,596 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simpv/power_kw = -17.175
2018-01-08 17:43:01,597 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/dispatch_kw = -1.05158333333
2018-01-08 17:43:01,597 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/power_kw = -1.051
2018-01-08 17:43:01,597 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ devices/simstorage/soc_kwh = 25.236

```

(continues on next page)

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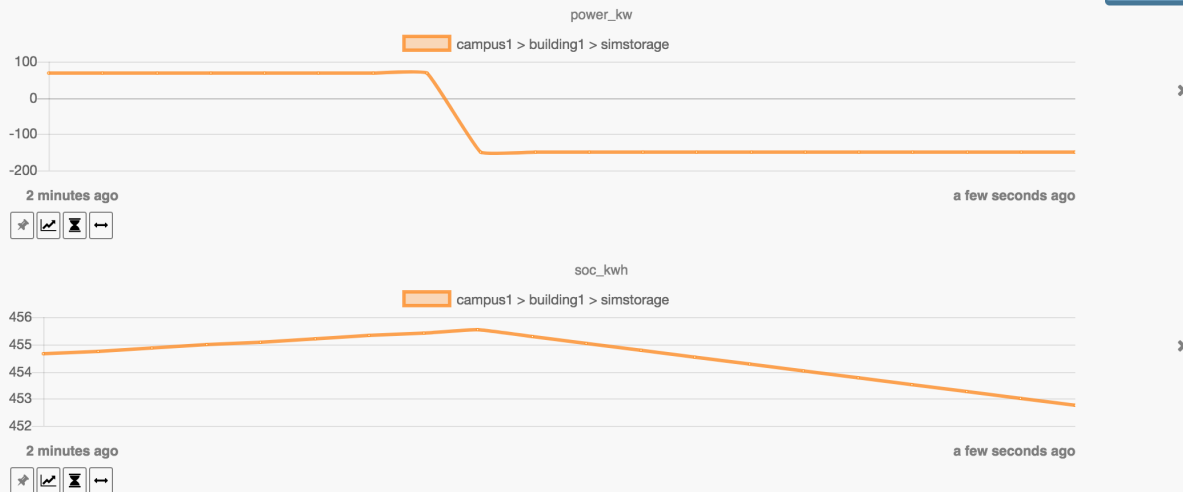
```

2018-01-08 17:43:01,597 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ net_power_kw = 33.704
2018-01-08 17:43:01,597 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ report_time = 2018-01-08 17:43:01.328388
2018-01-08 17:43:01,598 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Reporting telemetry: {'start_time': '2018-01-08 17:42:31.598889+00:00', 'baseline_
↳ power_kw': '50', 'current_power_kw': '33.704', 'end_time': '2018-01-08 17:43:01.
↳ 598889+00:00'}
2018-01-08 17:43:01,611 (referenceappagent-1.0 23842) referenceapp.agent DEBUG:
↳ Setting storage dispatch to -1.0515 kW

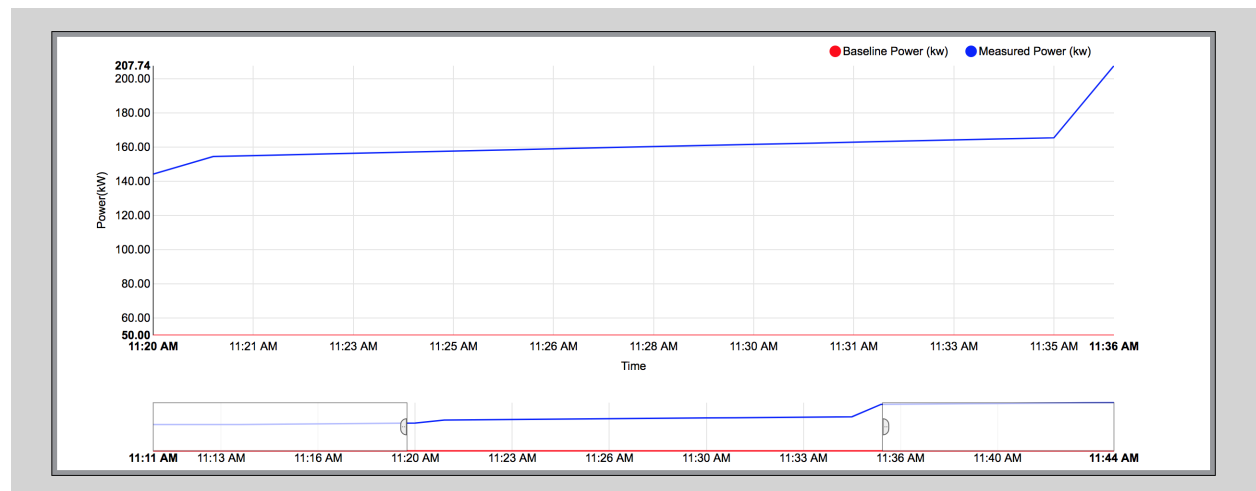
```

Another way to monitor progress is to launch the VolttronCentral web UI, which can be found at <http://127.0.0.1:8080/vc/index.html>. Here, in addition to checking agent status, one can track metrics reported by the simulated device drivers. For example, these graphs track the simstorage battery's power consumption and state of charge over time. The abrupt shift from charging to discharging happens because an OpenADR event has just started:

### Charts



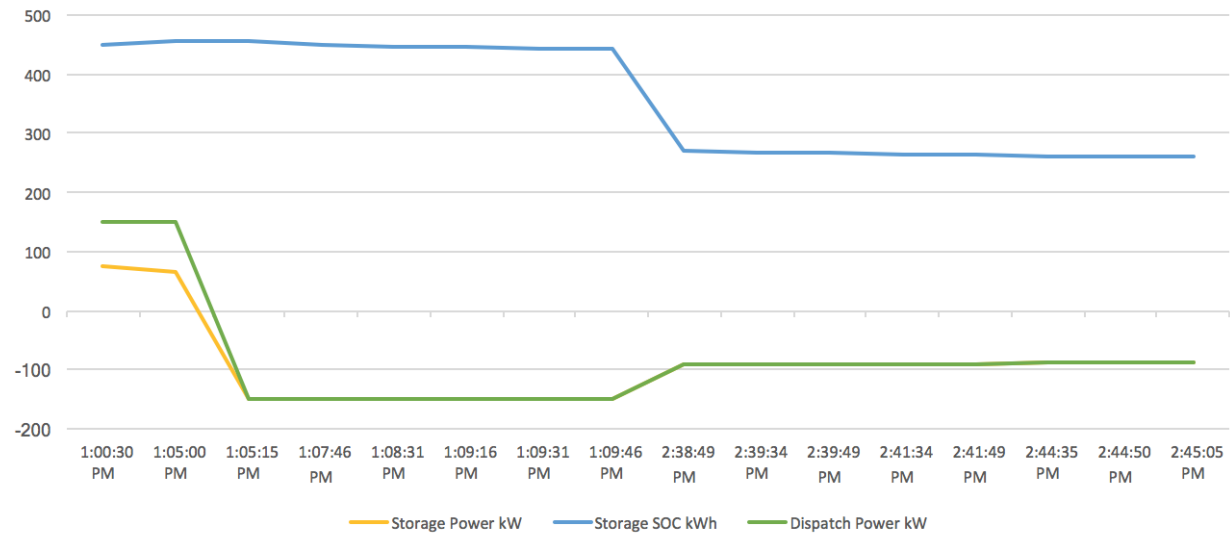
A third way to monitor progress, while there is an active DR event, is to examine the event's graph in the VTN web UI. This displays the VEN's power consumption, which is an aggregate of the consumption reported by each simulated device driver:



## Report Output

The ReferenceAppAgent also writes a CSV output file so that simulation results can be reported in a spreadsheet, for example this graph of the simulated storage device:

Simulation Output						
Time	Net Power kW	Load Power kW	PV Power kW	Storage Power kW	Storage SOC kWh	Dispatch Power kW
1:00:30 PM	364.312	460.5	-171	74.812	450.249	150
1:05:00 PM	356.374	460.5	-171	66.874	455.528	150
1:05:15 PM	139.5	460.5	-171	-150	454.778	-150
1:07:46 PM	139.5	460.5	-171	-150	448.528	-150
1:08:31 PM	139.561	460.5	-171	-149.939	446.778	-149.9395474
1:09:16 PM	140.148	460.5	-171	-149.352	444.781	-149.3529006
1:09:31 PM	140.398	460.5	-171	-149.102	444.283	-149.1024863
1:09:46 PM	140.565	460.5	-171	-148.935	443.536	-148.9355433
2:38:49 PM	173.918	463.8	-199.5	-90.382	269.315	-90.38282894
2:39:34 PM	174.272	463.8	-199.5	-90.028	268.107	-90.02849427
2:39:49 PM	174.424	463.8	-199.5	-89.876	267.807	-89.87663656
2:41:34 PM	175.276	463.8	-199.5	-89.024	265.117	-89.02415495
2:41:49 PM	175.426	463.8	-199.5	-88.874	264.819	-88.87430859
2:44:35 PM	176.812	463.8	-199.5	-87.488	260.692	-87.48881646
2:44:50 PM	176.91	463.8	-199.5	-87.39	260.254	-87.39093025
2:45:05 PM	190.256	477	-199.5	-87.244	259.962	-87.24410094



## For Further Information

If you have comments or questions about this simulation support, please contact Rob Calvert or Nate Hill at Kisensum, Inc.:

- (github) [@rob-calvert](#)
- (email) [rob@kisensum.com](mailto:rob@kisensum.com)
- (github) [@hillnate](#)
- (github) [nate@kisensum.com](mailto:nate@kisensum.com)

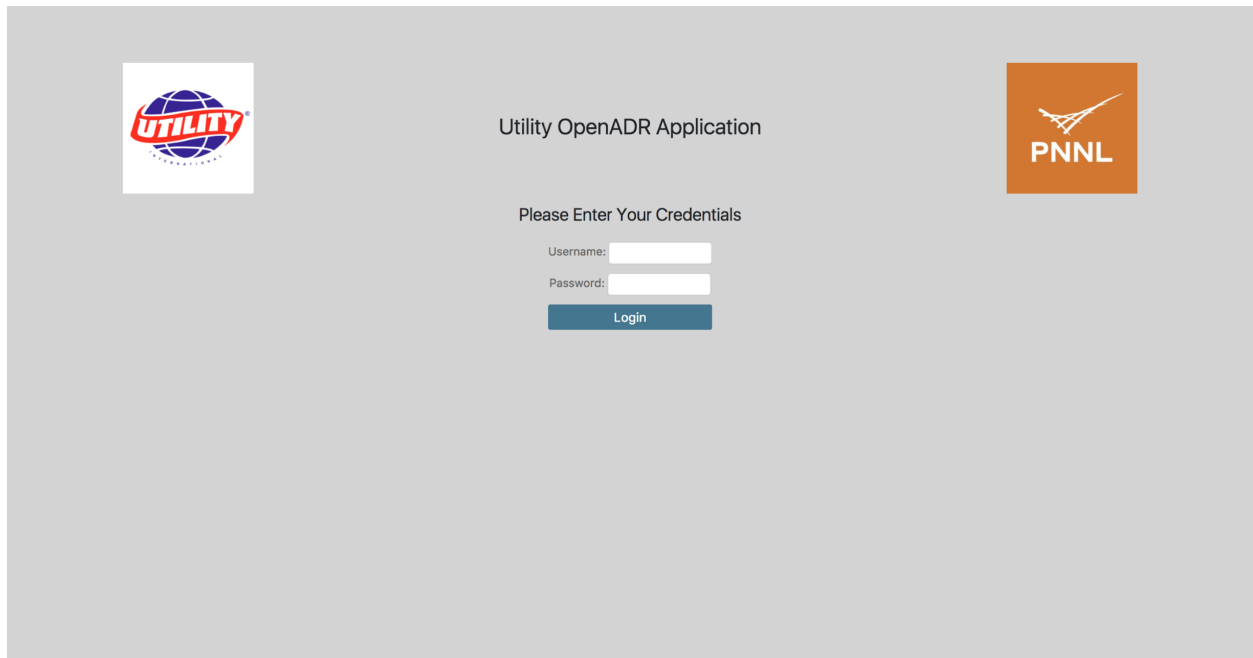
## OpenADR VTN Server: User Guide

**Warning:** This VTN server implementation is incomplete, and is not supported by the VOLTTRON core team. For information about its status including known issues, refer to the [VTN Server Configuration docs](#).

This guide assumes that you have a valid user account to access and log in to the VTN application website.

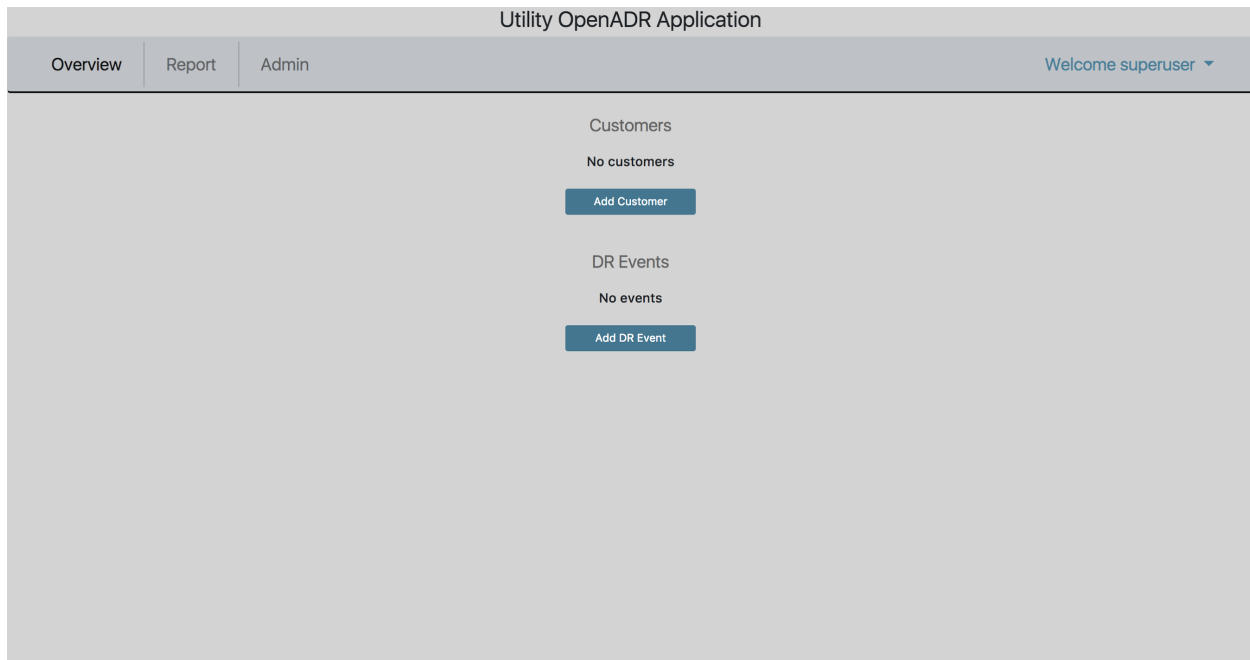
### Login Screen

In order to begin using the VTN application, navigate to `\http://yourhostname*<or>*ip:8000/vtn`.



### Overview Screen

Once logged in for the first time, this is the ‘Overview’ screen.



In order to begin scheduling DR events, one must first create at least one customer, with at least one associated site/VEN, and at least one sort of demand response (DR) program. A VTN will not be able to tell a VEN about DR Events if the VTN doesn't know about the VEN. A VTN knows about a VEN after a Site for the VEN has been created in the VTN application, and the VEN has contacted the VTN.

The rest of this document describes how to set up Customers, Sites, DR Programs, and DR Events, as well as how to export event data.

## Create a Customer

Creating a Customer can be done by clicking on 'Add Customer' on the **Overview** screen.

The standard interface for adding a Customer:

Utility OpenADR Application

Overview

Report

Admin

Welcome superuser ▾

Add Customer

Name

Utility ID

Contact Name

Phone Number

Save

Customers will appear on the **Overview** screen after they have been added.

Utility OpenADR Application

Overview

Report

Admin

Welcome superuser ▾

Customers

CUSTOMER	UTILITY ID	CONTACT NAME	PHONE NUMBER	SITES	ONLINE	OFFLINE
Acme Brands	UtilityID02	Joan Graham	2222222222	0	0	0
Best Electronics	UtilityID01	Carl Customer	5555555555	1	0	1
Globex Corp.	UtilityID03	Stanley Martinez	3333333333	0	0	0

Add Customer

DR Events

No events

Add DR Event



Create a Site

At first, Customers will not have any Sites. To add a Site for a Customer, click on the Customer’s name from the **Overview** screen, and then click ‘Create New Site’.

Utility OpenADR Application

Overview

Report

Admin

Welcome superuser

Customer: Globex Corp.

Name

Globex Corp.

Utility ID

UtilityID03

Contact Name

Stanley Martinez

Phone Number

3333333333

Save

No sites

Create New Site

On the **Create Site** screen, DR Programs will appear in the ‘DR Programs’ multiple-select box if they have been added. This will be discussed soon. Selecting one or more DR Programs here means, when creating a DR Event with a specified DR Program, the site will be an available option for the given DR Event.

*A site’s ‘VEN Name’ is permanent. In order to change a Site’s VEN Name, the Site must be deleted and re-added.*

Utility OpenADR Application

Overview

Report

Admin

Welcome superuser

Add New Site

Customer

Globex Corp.

Name

Headquarters

Site ID

SID04

Location code

LOC04

IP Address

178.121.5.166

DR Programs

Peak Day Pricing

Capacity Bidding

Direct Load Control

Hold down "Control", or "Command" on a Mac, to select more than one.

Address Line 1

2232 Allen Meadows

Address Line 2

City

East Andrea

State

WA

Zip

83431

VEN Name

ven03

Contact Name

Irma Gural

Phone Number

9999999999

Save New Site

After creating a Site for a given customer, the Site will appear offline until communication has been established with

the Site's VEN within a configurable interval (default is 15 minutes).

Utility OpenADR Application

Overview | Report | Admin

Welcome superuser ▾

Customer: Globex Corp.

Name

Globex Corp.

Utility ID

UtilityID03

Contact Name

Stanley Martinez

Phone Number

3333333333

Save

Sites

SITE	STATUS	CONTACT NAME	PHONE NUMBER
Headquarters	Offline	Irma Gural	9999999999

Create New Site

Note: When editing a Site, you will notice an extra field on the Screen labeled 'VEN ID'. This field is assigned automatically upon creation of a Site and is used by the VTN to communicate with and identify the VEN.

Utility OpenADR Application

Overview | Report | Admin

Welcome superuser ▾

Headquarters

Customer

Globex Corp.

Name

Headquarters

ID

SID04

Location code

LOC04

IP Address

178.121.5.166

DR Programs

Capacity Bidding

Direct Load Control

Peak Day Pricing

Hold down "Control", or "Command" on a Mac, to select more than one.

Address Line 1

2232 Allen Meadows

Address Line 2

City

East Andrea

State

WA

Zip

83431

VEN Name

ven03

VEN ID

2

Contact Name

Irma Gural

Phone Number

9999999999

Save

## Create a DR Program

DR Programs must be added via the Admin interface. DR Programs can be added with or without associated sites. In other words, a DR Program can be created with no sites, and sites can be added later, either by Creating/Editing a Site and selecting the DR Program, or by Creating/Editing the DR Program and adding the Site.

Utility OpenADR Application

Overview Report Admin Welcome superuser ▾

Home ▸ Vtn ▸ DR Programs ▸ Add DR Program

### Add DR Program

Program Name: **Peak Day Pricing**

Sites:

Available sites ⓘ

Filter

(Best Electronics) Emeryville

Choose all ⓘ

Chosen sites ⓘ +

Remove all ⓘ

Hold down "Control", or "Command" on a Mac, to select more than one.

Save and add another Save and continue editing SAVE

## Create a DR Event

Once a Customer (with at least one site) and a DR Program have been added, a DR Event can be created. This is done by navigating to the **Overview** screen and clicking 'Add DR Event'.

On the **Add DR Event** screen, the first step is to select a DR Program from the drop-down menu. Once a DR Program is selected, the 'Sites' multi-select box will auto-populate with the Sites that are associated with that DR Program.

*Note that the Notification Time is the absolute soonest time that a VEN will be notified of a DR Event. VENs will not 'know' about DR Events that apply to them until they have 'polled' the VTN after the Notification Time.*

Utility OpenADR Application

Overview | Report | Admin Welcome superuser ▾

### Add DR Event

DR Program

----- ▾

First pick a program, and the 'Sites' will auto-populate

Sites

(Acme Brands) Warehouse  
(Best Electronics) Emeryville  
(Globex Corp.) Headquarters

Notification

Date:  Today 📅

Time:  Now ⌚

Start

Date:  Today 📅

Time:  Now ⌚

End

Date:  Today 📅

Time:  Now ⌚

Active DR events are displayed on the **Overview** screen. DR Events are considered active if they have not been canceled and if they have not been completed.

Utility OpenADR Application

Overview | Report | Admin Welcome superuser ▾

### Customers

CUSTOMER	UTILITY ID	CONTACT NAME	PHONE NUMBER	SITES	ONLINE	OFFLINE
<a href="#">Acme Brands</a>	UtilityID02	Joan Graham	2222222222	1	0	1
<a href="#">Best Electronics</a>	UtilityID01	Carl Customer	5555555555	1	0	1
<a href="#">Globex Corp.</a>	UtilityID03	Stanley Martinez	3333333333	0	0	0

### DR Events

PROGRAM	NOTIFICATION	START	END	SITES	STATUS
<a href="#">Peak Day Pricing</a>	Dec. 5, 2017, 7 a.m.	Dec. 6, 2017, 5 p.m.	Dec. 6, 2017, 8 p.m.	2	Scheduled

Exporting event telemetry to a .csv is available on the **Report** tab. In the case of this VTN and its associated VENs, the telemetry that will be reported include **baseline power (kw)** and **measured power (kw)**.

Utility OpenADR Application

Overview | Report | Admin

Welcome superuser ▾

Export Report Data

Date Range: 
DR Program: All ▾
Filter Clear Filter(s)

DR PROGRAM	NOTIFICATION	START	END	SITES	ACTION
Peak Day Pricing	Dec. 5, 2017, 7 a.m.	Dec. 6, 2017, 5 p.m.	Dec. 6, 2017, 8 p.m.	2	<a href="#">Export</a>

## OpenADR VTN Server: Installation and Configuration

The OpenADR VTN server is a partial implementation of the OpenADR VTN specification developed by Kisenum for interoperability with the VOLTTRON core VEN agent implementation. The VTN server resides in the VOLTTRON applications repository, and is not supported by the VOLTTRON core team.

**Known issues:** The Kisenum implementation of the VTN server does not currently include support for registration, including QueryRegistration requests, create and cancel party requests, etc. Additionally, it does not implement opt-in behavior as specified by OpenADR. Finally, it has been found that requests containing empty basic authentication will be served a 403 error, while requests with no authentication will proceed to the correct endpoint normally.

The Kisenum VTN server is a Django application written in Python 3 and utilizing a Postgres database.

**Warning:** If you are planning to install your VTN server on the same system that contains your VOLTTRON instance and you are using RabbitMQ with VOLTTRON, you will need to set up a new instance of RabbitMQ for VTN. In production, the VTN server should be on a different device than VOLTTRON, and as such it is recommended that your VTN server is in it's own VM or on it's own machine. If you still wish to set up two instances of RabbitMQ on the same system, please refer to <https://www.rabbitmq.com> for further details.

## Get Source Code

To install the VTN server, first get the code by cloning volttron-applications from github and checking out the openadr software.

```
$ cd ~/repos
$ git clone https://github.com/volttron/volttron-applications
$ cd volttron-applications
$ git checkout master
```

## Install Python 3

After installing Python3 on the server, configure an openadr virtual environment:

```
$ sudo pip install virtualenvwrapper
$ mkdir ~/.virtualenvs (if it doesn't exist already)
```

Edit `~/.bashrc` and add these lines:

```
export WORKON_HOME=$HOME/.virtualenvs
export PROJECT_HOME=$HOME/repos/volttron-applications/kisensum/openadr
source virtualenvwrapper.sh
```

Create the openadr project's virtual environment:

```
$ source ~/.bashrc
$ mkvirtualenv -p /usr/bin/python3 openadr
$ setvirtualenvproject openadr ~/repos/volttron-applications/kisensum/openadr
$ workon openadr
```

From this point on, use **workon openadr** to operate within the openadr virtual environment.

Create a local site override for Django's base settings file as follows. First, create `~/.virtualenvs/openadr/settings` in a text editor, adding the following line to it:

```
openadr.settings.site
```

Then, edit `~/.virtualenvs/openadr/postactivate`, adding the following lines:

```
PROJECT_PATH=`cat "$VIRTUAL_ENV/$VIRTUALENVWRAPPER_PROJECT_FILENAME"`
PROJECT_ROOT=`dirname $PROJECT_PATH`
PROJECT_NAME=`basename $PROJECT_PATH`
SETTINGS_FILENAME=".settings"
ENV_FILENAME=".env_postactivate.sh"

# Load the default DJANGO_SETTINGS_MODULE from a .settings
# file in the django project root directory.
export OLD_DJANGO_SETTINGS_MODULE=$DJANGO_SETTINGS_MODULE
if [ -f $VIRTUAL_ENV/$SETTINGS_FILENAME ]; then
    export DJANGO_SETTINGS_MODULE=`cat "$VIRTUAL_ENV/$SETTINGS_FILENAME"`
fi
```

Finally, create `$PROJECT_HOME/openadr/openadr/openadr/settings/site.py`, which holds overrides to base.py, the Django base settings file. At a minimum, this file should contain the following:

```
from .base import *
ALLOWED_HOSTS = ['*']
```

A more restrictive `ALLOWED_HOSTS` setting (e.g. `'ki-evi.com'`) should be used in place of `*` if it is known.

## Use Pip to Install Third-Party Software

```
$ workon openadr
$ pip install -r requirements.txt
```

## Set up a Postgres Database

Install postgres.

Create a postgres user.

Create a postgres database named openadr.

(The user name, user password, and database name must match what is in **\$PROJECT\_HOME/openadr/openadr/settings/base.py** or the override settings in **\$PROJECT\_HOME/openadr/openadr/settings/local.py**.)

You may have to edit **/etc/postgresql/9.5/main/pg\_hba.conf** to be 'md5' authorization for 'local'.

## Migrate the Database and Create an Initial Superuser

```
$ workon openadr
$ cd openadr
$ python manage.py migrate
$ python manage.py createsuperuser
```

This is the user that will be used to login to the VTN application for the first time, and will be able to create other users and groups.

## Configure Rabbitmq

rabbitmq is used by celery, which manages the openadr server's periodic tasks.

Install and run rabbitmq as follows (for further information, see <http://www.rabbitmq.com/download.html>):

```
$ sudo apt-get install rabbitmq-server
```

Start the rabbitmq server if it isn't already running:

```
$ sudo rabbitmq-server -detached (note the single dash)
```

## Start the VTN Server

```
$ workon openadr
$ cd openadr
$ python manage.py runserver 0.0.0.0:8000
```

## Start Celery

```
$ workon openadr
$ cd openadr
$ celery -A openadr worker -B
```

## Configuration Parameters

The VTN supports the following configuration parameters, which can be found in **base.py** and overridden in **site.py**:

Parameter	Ex- am- ple	Description
VTN_ID	“vtn01”	OpenADR ID of this virtual top node. Virtual end nodes must know this VTN_ID to be able to communicate with the VTN.
ON-LINE_INTERVAL_MINUTES	15	The amount of time, in minutes, that determines how long the VTN will wait until displaying a given VEN as offline. In other words, if the VTN does not receive any communication from a given VEN within ONLINE_INTERVAL_MINUTES minutes, the VTN will display said VEN as offline.
GRAPH_TIMECHUNK_SECONDS	3600	The VTN displays DR Event graph data by averaging individual VENs’ telemetry by GRAPH_TIMECHUNK_SECONDS seconds. This value should be adjusted according to how often VENs are sending the VTN telemetry.

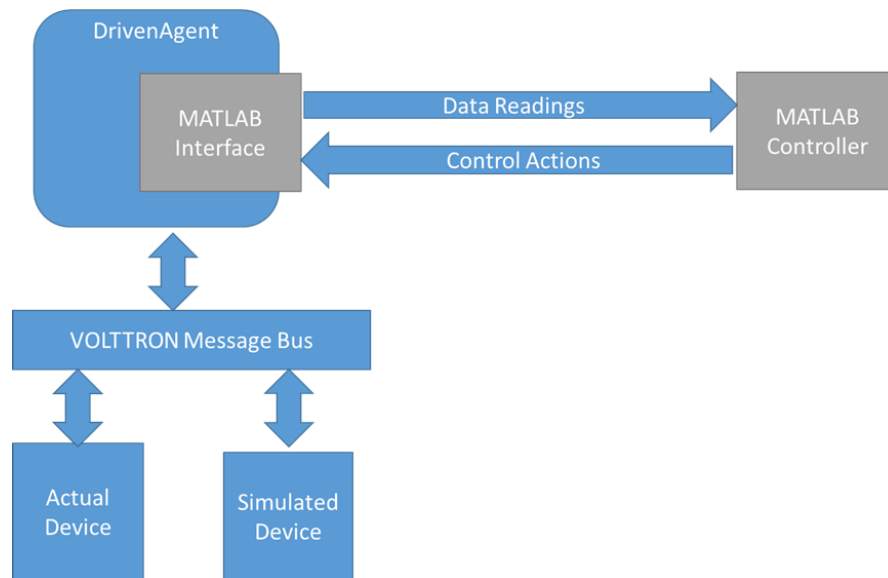
## 2.57.4 MatLab Integration

### Overview:

Matlab-VOLTTRON integration allows Matlab applications to receive data from devices and send control commands to change points on those devices.

DrivenMatlabAgent in VOLTTRON allows this interaction by using ZeroMQ sockets to communicate with the Matlab application.



**Data Flow Architecture:****Installation steps for system running Matlab:**

1. Install python. Suggested 3.6.
2. Install pyzmq (tested with version 15.2.0) Follow steps at: <https://github.com/zeromq/pyzmq>
3. Install Matlab (tested with R2015b)
4. Start Matlab and set the python path. In the Matlab command window set the python path with *pyversion*:

```
>> pyversion python.exe
```

5. To test that the python path has been set correctly type following in the Matlab command window. Matlab should print the python path with version information.

```
>> pyversion
```

6. To test that the pyzmq library is installed correctly and is accessible from python inside Matlab, type the following in Matlab command window and it should show pyzmq version installed.

```
>> py.zmq.pyzmq_version()
```

7. Copy *example.m* from *volttron/examples/ExampleMatlabApplication/matlab* to your desired folder.

## Run and test Matlab VOLTTRON Integration:

### Assumptions

- Device driver agent is already developed

### Installation:

1. Install VOLTTRON on a VM or different system than the one running Matlab.

Follow link: <http://volttron.readthedocs.io/en/develop/install.html>

2. Add subtree volttron-applications under volttron/applications by using the following command:

```
git subtree add --prefix applications https://github.com/VOLTTRON/volttron-  
applications.git develop --squash
```

### Configuration

1. Copy example configuration file *applications/pnnl/DrivenMatlabAgent/config\_waterheater* to *volltron/config*.
2. Change *config\_url* and *data\_url* in the new config file to the ipaddress of machine running Matlab. Keep the same port numbers.
3. Change campus, building and unit (device) name in the config file.
4. Open *example.m* and change following line:

```
matlab_result = '{"commands":{"Zone1":[["temperature",27]],"Zone2":[["temperature",  
28]]}}';
```

Change it to include correct device name and point names in the format:

```
'{"commands":{"device1":[["point1",value1]],"device2":[["point2",value2]]}}';
```

### Steps to test integration:

1. Start VOLTTRON
2. Run Actuator
3. Run device driver agent
4. Run DrivenMatlabAgent with the new config file
5. Run *example.m* in Matlab

Now whenever the device driver publishes the state of devices listed in the config file of DrivenMatlabAgent, DrivenMatlabAgent will send it to Matlab application and receive commands to send to devices.

## Resources

[http://www.mathworks.com/help/matlab/getting-started\\_buik\\_wp-3.html](http://www.mathworks.com/help/matlab/getting-started_buik_wp-3.html)

## 2.58 VOLTTRON Quick Start

This tutorial has been written with the intent of helping folks get up-and-running with VOLTTRON. The tutorial is designed to deploy on Linux virtual machines. While not going too much into depth, it covers the following topics:

- Install the VOLTTRON platform and verify the installation.
- Get familiar with the VOLTTRON components.
- Get familiar with the VOLTTRON commands.

### 2.58.1 Prerequisites

In this tutorial we will demonstrate installing the VOLTTRON platform at an [Ubuntu 20.04 LTS \(Focal Fossa\)](#) Virtual machine. In order to follow the tutorial, the prerequisites are as follows:

- Linux OS image (e.g., Ubuntu 20.04)
- Virtualization software (e.g., VirtualBox, VMware)
- Internet accessibility
- sudo capability

### 2.58.2 Installation Steps

#### 1. Install prerequisites

The first step is to make sure required dependencies are fulfilled. Install the dependencies with the following command:

```
$ sudo apt-get update
$ sudo apt-get install build-essential python3-dev python3-venv openssl libssl-dev
↳ libevent-dev git
```

Verify python installation with the following command:

```
$ python3 --version
```

```
# expected output similar to this
Python 3.8.10
```

Similarly, verify git installation.

```
$ git --version
```

```
# expected output similar to this
git version 2.25.1
```

## 2. Download VOLTTRON code

Download the VOLTTRON code to the default home directory using `git clone` command.

```
$ cd ~
$ git clone https://github.com/VOLTTRON/volttron
```

```
# expected output similar to this
Cloning into 'volttron'...
remote: Enumerating objects: 82987, done.
remote: Counting objects: 100% (4892/4892), done.
remote: Compressing objects: 100% (1971/1971), done.
remote: Total 82987 (delta 3155), reused 4294 (delta 2890), pack-reused 78095
Receiving objects: 100% (82987/82987), 102.73 MiB | 4.19 MiB/s, done.
Resolving deltas: 100% (57997/57997), done.
Checking out files: 100% (1807/1807), done.
...
```

---

**Note:** In this tutorial we download the VOLTTRON code to the default home directory. However, feel free to download the code to a different place as desired.

---

```
# $ mkdir <path-to-dir>
# $ cd <path-to-dir>
# $ git clone https://github.com/VOLTTRON/volttron
```

After successfully downloading the VOLTTRON package, change the current working path to the code path. Then, inspect the source code files.

```
$ cd volttron
$ ls
```

```
# expected output similar to this
bootstrap.py      deprecated      pylintrc       requirements.py  stop-volttron
ci-integration   docs           pytest.ini     scripts         TERMS.md
CONTRIBUTING.md examples       README.md     services        volttron
COPYRIGHT        integrations  readthedocs.yml  setup.py       volttron_data
debugging_utils  LICENSE.md    RELEASE_NOTES.md start-volttron  volttrontesting
```

## 3. Bootstrap VOLTTRON environment

VOLTTRON is a Python-based platform. In this step, we will rely on the `bootstrap.py` script in the root directory to bootstrap the platform environment. This process will create a virtual environment and install the package's Python dependencies.

---

**Note:** VOLTTRON provides different message bus options. In this tutorial we will demonstrate the default ZeroMQ option. (Read more about [message bus](#).)

---

Bootstrap the VOLTTRON environment by running the following command. (This may take a while.)

```
$ python3 bootstrap.py
```

```
# expected output similar to this
UPDATE: []
Installing required packages
+ pip install --no-deps wheel==0.30
Collecting wheel==0.30
Using cached
<https://files.pythonhosted.org/packages/0c/80/
↳16a85b47702alf47a63c104c91abdd0a6704ee8ae3b4ce4afc49bc39f9d9/wheel-0.30.0-py2.py3-
↳none-any.whl>
...
```

After bootstrap finished, we activate the Python virtual environment with the following command:

```
$ source env/bin/activate
```

You may notice the command prompt has changed and there is the virtual environment name as prefix. e.g., (volttron) user@host:~/volttron \$. The prefix environment name indicates the virtual environment is activated.

Alternatively, you can use the following command to verify if the virtual environment is up.

```
$ env |grep VIRTUAL_ENV |wc -l
```

```
# expected output 1(virtual environment is up) or 0 (not up)
```

Use *deactivate* command to deactivate the virtual environment, i.e., `$ deactivate volttron`. Note: if you run this command, remember to re-activate the virtual environment to follow the rest of the steps.

**Note:** In this tutorial the VOLTRON platform is deployed in *virtualenv*. In case you choose other virtual environment, make adjustment as needed.

## 4. Start VOLTRON

In this step, we will start the VOLTRON platform and demonstrate several VOLTRON commands.

Start the VOLTRON platform with the following command:

```
$ ./start-volttron
```

```
# expected output similar to this
...
Starting VOLTRON verbosely in the background with VOLTTRON_HOME=/home/user/.volttron
Waiting for VOLTRON to startup..
VOLTRON startup complete
```

Check the status of VOLTRON with the following command:

```
$ vctl status
```

For fresh installation, the result might look like the following since there are no agents installed yet.

```
# expected output similar to this
No installed Agents found
```

---

**Tip:** Use `vctl status` to check status. This is a very useful command to inspect the status of VOLTTRON.

---

VOLTTRON platform comes with several built in services and example agents out of the box. In this demo, we use the Listener Agent - a simple agent that periodically publishes heartbeat message and listens to everything on the message bus. (Read more about [agent](#).)

Install the Listener agent using the following command:

```
$ vctl install examples/ListenerAgent --tag listener
```

```
# expected output similar to this
Agent b755bae2-a3f5-44a0-b01f-81e30b989138 installed
```

Start the agent we just installed specified by the *listener* tag.

```
$ vctl start --tag listener
```

```
# expected output similar to this
Starting b755bae2-a3f5-44a0-b01f-81e30b989138 listeneragent-3.3
```

Check the status again.

```
$ vctl status
```

```
# expected output similar to this
UUID AGENT          IDENTITY          TAG      STATUS      HEALTH
8 listeneragent-3.3 listeneragent-3.3_1 listener running [2192] GOOD
```

From the above result, we can tell the listener agent is functioning properly!

---

**Tip:** While the `--tag` sub-command is optional, a tag is helpful for managing agents by adding semantic tags to different topics, so that topic can be queried by tags instead of specific topic name or topic name pattern.

You can choose any tag name that makes sense to you, as long as the tags are already defined in the VOLTTRON tagging schema. (Read more about [tag](#).)

---

In addition to the `vctl status`, another way to check VOLTTRON status is by inspecting the `volttron.log` file. The file provides rich information about the platform and becomes handy for debug purposes.

```
$ tail -f volttron.log
```

```
# example output (success)
# listener agent is publishing heartbeat messages successively.
2022-03-04 14:12:46,463 (listeneragent-3.3 2192) __main__ INFO: Peer: pubsub, Sender:
↳ listeneragent-3.3_1, Bus: , Topic: heartbeat/listeneragent-3.3_1, Headers: {
↳ 'TimeStamp': '2022-03-04T19:12:46.460096+00:00', 'min_compatible_version': '3.0',
↳ 'max_compatible_version': ''}, Message: 'GOOD'
...
```

```
# example output (error)
2022-03-04 13:16:05,469 (listeneragent-3.3 3233) volttron.platform.vip.agent.core_
↳ ERROR: No response to hello message after 10 seconds.
2022-03-04 13:16:05,469 (listeneragent-3.3 3233) volttron.platform.vip.agent.core_
↳ ERROR: Type of message bus used zmq
```

(continues on next page)

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```

2022-03-04 13:16:05,469 (listeneragent-3.3 3233) voltttron.platform.vip.agent.core_
↪ERROR: A common reason for this is a conflicting VIP IDENTITY.
2022-03-04 13:16:05,469 (listeneragent-3.3 3233) voltttron.platform.vip.agent.core_
↪ERROR: Another common reason is not having an auth entry on the target instance.
2022-03-04 13:16:05,469 (listeneragent-3.3 3233) voltttron.platform.vip.agent.core_
↪ERROR: Shutting down agent.
...

```

## 5. Stop VOLTRON (Optional)

To stop VOLTRON, use the following command:

```
$ ./stop-voltttron
```

```

# expected output similar to this
Shutting down VOLTRON

```

After stopping the platform, check the status again to verify the VOLTRON platform is shut down.

```
$ vctl status
```

```

# expected output similar to this
VOLTRON is not running. This command requires VOLTRON platform to be running

```

### 2.58.3 Clean up (Optional)

If for some reason you would like to clean up VOLTRON, here is the guide to remove the whole VOLTRON package

- remove the code folder (e.g., `~/voltttron/`)
- remove the `.voltttron/` folder at `VOLTRON_HOME/.voltttron` (e.g., by default at `~/voltttron`)

### 2.58.4 Summary

This short tutorial for VOLTRON first-time users. We covered the following topics.

- VOLTRON platform installation. (e.g., on a Virtual Machine.)
- VOLTRON components. (e.g., agent, message bus, tag.)
- VOLTRON commands. (e.g., `start-voltttron`, `vctl status`.)

### 2.58.5 Next Steps

There are several walk-throughs and detailed explanations of platform features to explore additional aspects of the platform:

- *Agent Framework*
- *Driver Framework*
- Demonstration of the *management UI*
- *RabbitMQ setup* with Federation and Shovel plugins



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