#### Oracle DataRaker

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## **Typographical Conventions**

The following represents the styles applied to this guide.

Convention	Meaning
Bold	Bold text indicates a user interface element. Examples include window/page titles, keywords, and interactive elements such as menus, buttons, etc.
Hyperlink	A link to another section of the document or to an external document or website.
Add this text	Indicates something the user should enter in a field. Typically rendered as constant width font with a shaded background.
varname	Constant width italic indicates a user interface choice.
constant width type in a shaded block.	Used for code examples.
constant width	Example code in the midst of regular text.
NOTE: Note	A note providing a tip, suggestion, or a general information.
IMPORTANT: Note	A note with additional important information.
CAUTION: Note	A note of caution.

## **DataRaker Overview**

DataRaker is a SaaS offering (Software as a Service, aka Cloud Services) that provides analytical insight into the most critical business areas of a utility. DataRaker unlocks smart grid data and turns it into actionable insight for electric, gas, and water utilities.

The DataRaker platform has unmatched depth and breadth of proven support for utilities' most critical business areas. The rapidly expanding availability of smart grid data allows for powerful applications that extend far beyond meter data analytics. DataRaker provides Utilities with quick answers to most pressing questions regarding Meter to Bill, Revenue Protection, Distribution Planning, Demand Response, and Energy Efficiency.

Utilities are also faced with an evolving industry, fast growing Smart meter deployment, aging infrastructure, dispersed energy generation, and increasing expectations from their customers. Adapting to these factors with existing resources and systems likely requires significant modification to the current business model. The DataRaker application offers utilities a complete toolkit to gain insight into critical business areas and provides actionable results to address, improve, or mitigate a situation. DataRaker renders high-level snapshots of the meter install base's health, exceptions that are available for review, and detailed information about a specific attribute (such as, a meter, transformer, rate, or read route). DataRaker also supports customized analytics that are built to meet distinct customer needs.

This documentation describes the features and functionality of the DataRaker system.

## **Configuration Overview**

Some components in the DataRaker user interface are configured by editing XML that is accessible from the Administer **Configuration** page. The component configuration determines the options and views available to the user based on their group permissions and the role that is selected in the **Role** list in the **Global Filters** panel.

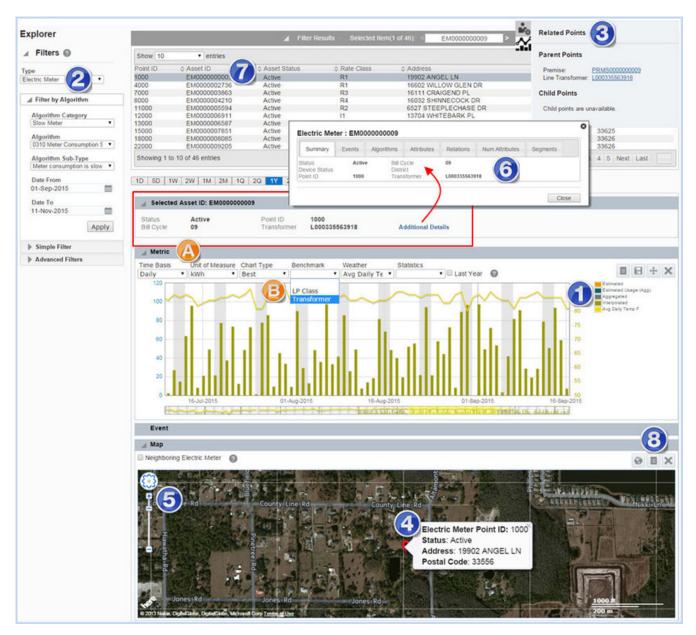
## **User Types and Roles**

User permissions are based on the group to which they are assigned. There are two primary permission categories: nonpower user and power user. Business class users are typically assigned to a non-power user group, which provides them with a streamlined user interface having only those features that they would need. More technical users are assigned to a power user group and given access to all user interface features.

**NOTE:** Only power users have access to view or edit configuration options.

## **Illustrated Configuration Settings**

The **Administer Configuration** settings allow you to define certain user interface views and options. Each configuration option has a specific name that the user interface recognizes and applies based on the role and point type selected.



The following configuration settings are available:

Component Configured	Configuration Name	Description
1. Chart Colors	CHART_SETTING	Chart color settings configuration defines coloring for chart data.
2. Search Filter	FILTER_CONFIG	Defines the search options for each type.
3. Related Data	GOTO_INFO	The related data configuration defines the related types that should be displayed for the selected type ( <i>e.g.</i> , an electric meter could have a line transformer and a premise as related points).
4. Map Point Information Pop-up	MAPS_INFO_POPUP	Settings for the point information pop-up balloons in the map.
5. Map Rendering	MAPS_RENDER_AS	Settings for the map based on role and point type.
6. Point Detail Information	POINT_INFO	Point information configuration defines the layout and data that appears in the point information tables.
7. Configuring Point Search Columns	POINT_SEARCH_COLUMN	Settings for the data columns that appear in the Explorer Filter Results grid.

Component Configured	Configuration Name	Description
8. Chart Panels (Rakes)	RAKE	Rake configuration defines the following: Chart labels on the panel title bar [A]. Which options are available in the chart panel drop-down lists [B]. Which chart panels are available based on the (user) Role and the (point) Type [C]. Which rakes open by default.
		<b>NOTE:</b> RAKE configuration determines what panels appear, but the appearance and behavior of some panels ( <i>e.g.</i> , Text) is not configurable. See <i>Configuring Chart Panels (Rakes)</i> for details.

#### NOTE:

The **Explorer** page is accessed by selecting **Explore** > **Point** > **Data**. See the **Explore** section in the *OracleDataRaker Users Guide* for information.

## **Configuring Color Settings**

The data visualization charts can be customized by color and information displayed for specific roles and fact types (please know that each role must have its color setting configured individually.)

This section describes the options available to configure how facts, events, metrics, segments, and highlight colors appear within charts.

## **Creating CHART\_SETTINGS Configuration**

Chart coloring configuration is defined in the CHART\_SETTINGS configuration setting.

Chart coloring is configured from the Administer Configuration page.

NOTE: Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the CHART\_SETTINGS configuration. If it already exists, skip to *Accessing CHART\_SETTING XML*.

Click Add .

The Create Configuration dialog will open.

4. Complete the following fields:

**a)** Config Name: select CHART\_SETTINGS from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example, "CHART\_SETTINGS configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring CHART\_SETTINGS XML* for more information about the configuration options.
- d) Status: select Active.
- 5. Click Save.

## Accessing CHART\_SETTING XML

Chart settings may be configured from the **Administer Configuration** page. Only administrative users can change configuration settings.

Each Role has its own configuration.

#### 1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

#### 2. From the Config Name drop-down list, select: CHART\_SETTING

#### 3. Click Get Config.

The configuration will be displayed in a data table.

#### Table 1: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Operations the following links

Contains the following links:

View: opens the View Config popup dialog that allows you to view the configuration description.

NOTE: The popup displays the same information as displayed in the data table row.

#### Fields:

- Config ID: the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Role Type Code: the role's role type code.

Column Name	Description
	Config Name: the name of the selected configuration.
	• Config Description: the description for the configuration.
	• <b>Config XML:</b> a link to the XML for the configuration; the XML may be viewed or edited by following the link.
	• Status: states whether the configuration is currently active or inactive.
	• Create Time: the date and time when the configuration was created.
	• Update Time: the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Config view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Config dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description an status.
	XML: opens the Config XML dialog.

4. In the data table row, click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

## Configuring CHART\_SETTINGS XML

When configuring chart settings, it is important to note that chart configuration uses a default overwrite methodology for specific fact based colors. Therefore, if no color is given for a specific fact name, it will use a default color. Both default and non-default colors are defined in the same configuration file. Key colors have comments to the right of them separated by the "#" symbol. It is advised to leave the comments in and only alter the color codes themselves when making changes. The colors are defined using an RBG (Red/Blue/Green) color system.

**NOTE:** RBG pallet color selector tools are widely available online or through typical desktop applications such as Paint. These applications provide the RGB codes for selected colors.

code block	description	
COLORS:	Beginning of the COLORS: definition.	
<pre>factBasedColors: Aggregated: "rgb(0, 114, 169)" # blue Derived: "rgb(120, 120, 120)" # grey Estimated: "rgb(120, 120, 90)" # greyish green Interpolated: "rgb(238, 154, 0)" # orange</pre>	factBasedColors: This section controls the specific fact color definitions. These are <i>optional</i> , and will overwrite the default colors for the facts. In the above example, any fact containing Aggregated will be blue. If it is desired to have consistent colors, factBasedColors should be given colors for each fact name following the example.	
<pre>eventColors: - "rgb(0, 0, 102)" - "rgb(0, 102, 0)" - "rgb(102, 0, 0)" - "rgb(32, 32, 32)" - "rgb(153, 0, 76)" - "rgb(153, 153, 0)" - "rgb(0, 102, 102)"</pre>	eventColors: This section is relevant for events, relations, and segments in the Fact Data Viewer, as well as flag panels in the Explorer page. It is advised to keep many colors defined in this section, because a chart will often contain many different events at once, which requires a large collection of colors. These are listed linearly along the chart's Y axis and legend, meaning that	
	the order is maintained from top to bottom of the configuration list as it is within the chart itself. If	

red is defined first, the first event type on the chart will be red.

	will be red.
<pre>metricColors: "rgb(236, 219, 24)" # yellow for chart (weather) "rgb(181, 168, 24)" # yellow for Y labels (weather axis) "rgb(135, 206, 250)" # blue for last year "rgb(0, 114, 169)" # color1 for chart "rgb(20, 120, 120)" # alt color: color2 for chart "rgb(238, 154, 0)" # alt color: color3 for chart "rgb(238, 154, 0)" # alt color: color3 for chart "rgb(238, 130, 0)" # alt color: color5 for chart "rgb(238, 130, 0)" # alt color: color6 for chart "rgb(215, 154, 0)" # alt color: color7 for chart "rgb(77, 77, 77)" # MIN color "rgb(77, 77, 77)" # MAX color "rgb(77, 77, 77)" # MEDIAN color "rgb(77, 77, 77)" # MEDIAN color "rgb(77, 77, 77)" # 10th percentile color "rgb(90, 42, 42)" # 10th percentile color "rgb(190, 42, 42)" # low std dev color "rgb(190, 238, 0)" # high std dev color</pre>	metricColors: This section contains the 'default' colors for metric based charts. Examples of metric based charts include the Benchmark and Metric panels, as well as all Metric type views in the Fact Data Viewer. It is important to note that the length of this list should remain constant. <b>Do not add or remove from this list</b> , only make changes to the colors themselves. The order of this list should not change. To adjust the colors, follow the comments to the right following the "#" symbol and change the RBG codes as desired. The second half of these are for chart Aggregates options like min, max, std dev, etc. The color of these aggregate lines is defined here.
<pre>bottomChartColors: "rgb(9, 129, 154)" # light blue color for bottom chart set "rgb(178, 34, 34)" # red color for bottom chart series 2 "rgb(0, 255, 127)" # green color for bottom chart series "rgb(147, 112, 219)" # purple color for bottom chart serie "rgb(0, 0, 0)" # black for power outs</pre>	and removals should typically not be necessary.
<pre>segmentColors: - "rgb(0, 238, 0)" - "rgb(190, 42, 42)" - "rgb(0, 238, 0)" - "rgb(190, 42, 42)"</pre>	segmentColors: This section defines the colors for segments within many different chart types. These follow the same ordering rules as eventColors, meaning that whatever appears first in the list will appear first on the chart. To make changes, simply change the RBG color codes.
highlightColor: - "#FFFF00" # yellow color when dragging on a chart	highlightColor: Charts can be zoomed into by dragging on the chart face. The color that 'highlights' during this dragging action can be customized using this configuration line. In the above example it is yellow, but can be changed to any RBG color code.

## **Configuring Search Filters**

Filters configuration controls the drop-down list options for a standard search.

Search filter drop-down list options are defined in the *FILTER\_CONFIG* configuration. Each role has its own filter configuration, which defines the filter options by point type. The configuration allows the user to search by point type facts and related points.

NOTE: It is not possible to search by attributes such as address or customer name.

For example, an electric meter search could have the following options:

- Electric Meter (Point) ID
- Electric Meter Lookup
- Electric Meter Tag
- Electric Meter Name
- Line Transformer
- Bill Cycle

#### Explorer

<b>ype</b> Electric Mete	r 🔻
Filter by	Algorithm
▲ Simple	Filter
Filter By	Meter Point 1
	Meter Point ID
	Construction of the second
	Meter ID
	Meter ID Meter Name
	Meter Name Postal Code
Advanc	Meter Name Postal Code Line Transformer

When configuring the point types and options, it is important to remember to make the labels business-related and easy for the end-user to understand; for example, the Point ID is commonly mapped to the Meter Tag or Badge Number, ID is typically the system-assigned identifier, and Name is commonly the utility's name for that entity. Finally, it is also possible to configure the entity relations that are available; for example, it is possible to make Transformer and Bill Cycle relations to a meter instead of information directly associated to the meter. See *Configuring Related Data* for more information about configuring relationships.

Search queries the database point table, which allows you to search for a point and facts that are related to it. Parent relationships are not available in the point table, which precludes a search for a parent object (such as, account).

**NOTE:** The additional fact filters are not configurable.

## **Creating FILTER\_CONFIG Configuration**

Standard search filters are configured from the Administer Configuration page.

**NOTE:** Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

3. NO

**NOTE:** This step is only necessary if the **Config Name** list does not display the FILTER\_CONFIG configuration. If it already exists, skip to *Accessing FILTER\_CONFIG XML*.

Click Add.

The Create Configuration dialog will open.

- 4. Complete the following fields:
  - a) Config Name: select FILTER\_CONFIG from the drop-down menu.

The **Config Name** list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example, "FILTER\_CONFIG configuration for the Billing Role."
- c) Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See Configuring FILTER\_CONFIG XML for more information about the configuration options.
- d) Status: select Active, if necessary.
- 5. Click Save.

## Accessing FILTER\_CONFIG XML

1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

#### 2. From the Config Name drop-down list, select: FILTER\_CONFIG

#### 3. Click Get Config.

The configuration will be displayed as a row in a data table.

#### Table 2: Administer Configuration Data Table

Column Name	Description	
ID	Contains the system-generated identification number for the configuration.	
Environment	The server environment name.	
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.	
Config Name	The name of the selected configuration.	
Description	The description from the configuration definition.	
Active	Shows whether the selected configuration is active or inactive	
Create Time	The date and time when the configuration setting was created.	
Update Time	The date and time when the configuration setting was last updated.	
	Contains the following links:	

View: opens the View Configuration popup dialog that allows you to view the configuration description.

**NOTE:** The popup displays the same information as displayed in the data table row.

#### Fields:

- Config ID: the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Role Type Code: the role's role type code.
- Config Name: the name of the selected configuration.

Column Name	Description
	Config Description: the description for the configuration.
	<ul> <li>Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.</li> </ul>
	• Status: states whether the configuration is currently active or inactive.
	Create Time: the date and time when the configuration was created.
	• Update Time: the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Configuration dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description and status.
	XML: opens the Config XML dialog.

4. Click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

## Configuring FILTER\_CONFIG XML

The Search filters configuration XML defines the options that will appear on the drop-down list in Standard search tab.

#### **Configuration Code Structure**

The configuration code has the following general structure:

```
PointTypeCodel
configuration settings...
PointTypeCode2
configuration settings...
```

#### code block

EM:	
-	table: POINT
	label: 'Electric Meter Point ID'
	column: point_id
-	table: POINT
	label: 'Electric Meter ID'
	column: point_tag
-	table: POINT
	label: 'Electric Meter Name'
	column: point_name
-	table: FACT
	label: 'Bill Cycle'
	column: fact_lookup BILL_CYCLE
-	table: FACT
	label: 'Line Transformer'
	column: fact_lookup LINE_TX

#### description

EM: search options provides search by:

- Electric Meter Point ID
- Electric Meter ID
- Electric Meter Name
- Bill Cycle
- Line Transformer

#### NOTE:

When the table is FACT, specify column: by fact\_lookup | LOOKUP\_VALUE

#### description

When the table is POINT, specify column: by column\_name

GM: GM: search options provides search by: - table: POINT · Gas Meter Point ID label: 'Gas Meter Point ID' column: point\_id Gas Meter ID - table: POINT label: 'Gas Meter ID' column: point\_tag Gas Meter Name - table: POINT • Bill Cycle label: 'Gas Meter Name' column: point\_name table: FACT label: 'Bill Cycle' column: fact\_lookup|BILL\_CYCLE WM: search options provides search by: WM: - table: POINT label: 'Water Meter Point ID' Water Meter Point ID column: point\_id Water Meter ID - table: POINT label: 'Water Meter ID' Water Meter Name column: point\_tag - table: POINT label: 'Water Meter Name'
column: point\_name Bill Cycle - table: FACT label: 'Bill Cycle'
column: fact\_lookup|BILL\_CYCLE LINE\_TX: LINE\_TX: search options provides search by: - table: POINT label: 'Line Transformer Point ID' • Line Transformer Point ID column: point\_id Line Transformer ID - table: POINT label: 'Line Transformer ID' Line Transformer Name column: point\_tag - table: POINT label: 'Line Transformer Name' column: point\_name FEEDER: FEEDER: search options provides search by: - table: POINT Feeder Point ID label: 'Feeder Point ID' column: point\_id Feeder ID - table: POINT label: 'Feeder ID' Feeder Name column: point\_tag table: POINT label: 'Feeder Name' column: point\_name BILL\_CYCLE: BILL\_CYCLE: search options provides search by: - table: POINT label: 'Bill Cycle Point ID' • Bill Cycle Point ID column: point\_id Bill Cycle ID table: POINT label: 'Bill Cycle ID' Bill Cycle Name column: point\_tag - table: POINT label: 'Bill Cycle Name' column: point\_name LP\_CLASS: LP\_CLASS: search options provides search by: - table: POINT label: 'Load Profile Class Point ID' Load Profile Class Point ID column: point\_id Load Profile Class ID - table: POINT label: 'Load Profile Class ID'

code block	description
column: point_tag - table: POINT label: 'Load Profile Class Name' column: point_name	Load Profile Class Name
<pre>PRMS: - table: POINT label: 'Premise Point ID' column: point_id - table: POINT label: 'Premise ID' column: point_tag - table: POINT label: 'Premise Name' column: point_name</pre>	<ul> <li>PRMS: search options provides search by:</li> <li>Premise Point ID</li> <li>Premise ID</li> <li>Premise Name</li> </ul>
<pre>ZIP: - table: POINT label: 'Zip Code Point ID' column: point_id - table: POINT label: 'Zip Code ID' column: point_tag - table: POINT label: 'Zip Code Name' column: point_name</pre>	<ul> <li>ZIP: search options provides search by:</li> <li>Zip Code Point ID</li> <li>Zip Code ID</li> <li>Zip Code Name</li> </ul>
RATE: - table: POINT label: 'Rate Point ID' column: point_id - table: POINT label: 'Rate ID' column: point_tag - table: POINT label: 'Rate Name' column: point_name	RATE : search options provides search by: • Rate Point ID • Rate ID • Rate Name

## **Configuring Related Data**

The **GoTo: Related Points** component provides links, in the *drawer menu*, to points types related to the point being analyzed in the main pane. For example, if the point type in the main pane is an electric meter, the related points could be a Premise, a Line Transformer, etc. depending on the data and the configuration.

## **Creating GOTO\_INFO Configuration**

The GoTo: Related Points configuration is defined in the GOTO\_INFO configuration setting.

The page is configured from the Administer Configuration page.

**NOTE:** Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the GOTO\_INFO configuration. If it already exists, skip to *Accessing GOTO\_INFO XML*.

Click Add.

The Create Configuration dialog will open.

- 4. Complete the following fields:
  - a) Config Name: select GOTO\_INFO from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example, "GOTO\_INFO configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring GOTO\_INFO XML* for more information about the configuration options.
- d) Status: select Active.
- 5. Click Save.

## Accessing GOTO\_INFO XML

**GoTo** links are configured from the **Administer Configuration** page. Only administrative users can change configuration settings.

Each Role has its own configuration.

1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

#### 2. From the Config Name drop-down list, select: GOTO\_INFO

3. Click Get Config.

The configuration will be displayed as a row in a data table.

#### Table 3: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Contains the following links:

View: opens the View Configuration popup dialog that allows you to view the configuration description.

**NOTE:** The popup displays the same information as displayed in the data table row.

#### Fields:

- Config ID: the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Role Type Code: the role's role type code.
- Config Name: the name of the selected configuration.

Column Name	Description
	Config Description: the description for the configuration.
	<ul> <li>Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.</li> </ul>
	• Status: states whether the configuration is currently active or inactive.
	• Create Time: the date and time when the configuration was created.
	• Update Time: the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Configuration dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description and status.
	XML: opens the Config XML dialog.

4. In the data table row, click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

## Configuring GOTO\_INFO XML

Configuring GoTo links allows you to define the relationships between point type codes that can be used to quickly jump to related point information; such as parent or child points through the *Drawer Menu*.

Show 1	0 •	entries			<b>.</b>	Parent Points
Point ID	\$ Asset ID	Asset Status	Rate Class	Address	¢ City	- drent ronts
51423	ER002	Active	RES 909898	204 Broadway Street	SANFRA	Premise: 5201791155
51424	ER024	Active	RES 40390	4280 Torres Ave	Fremont	
51425	ER023	Active	RES 40390	37659 Argyle Road	Fremont	Child Points
151427	ER019	Active	COML 3498	801 Church Street	SANFRA	
151429	ER039	Active	RES 93645	160 Douglass Street	SAUFRA	Child points are unavailable.
151430	ER017	Active	RES 40390	846 Greenwich Street	SANFRA	
51431	ER003	Active	RES 909898	1 Saint Francis Place Apt 102	Sar Fran	
151433	ER038	Active	RES 909898	35 Mill Street	SAN FRAM	NCISCO 94134
51434	ER037	Active	COMS 1039	340 Ward Street	SAN FRAM	NCISCO 94134
451435	ER014	Active	COMS 1039	115 Gough Street	SAN FRAM	NCISCO 94102

Like the other configurations, these are based on point type codes. The point type codes are broken into separate sections for parent and children points. These will create links to the parent or child of the point currently being viewed. The format is:

Point Type Code | Fact Type Code | Fact Lookup: Pretty Name.

code block	description
PARENT_POINTS: EM: - EM RELATION PRMS: 'Premise'	Any defined relationship can be added. Therefore, if you wish to have a link to the meter's parent City, you would add the following:
- EM RELATION LINE_TX: 'Transformer'	PARENT_POINTS: - EM RELATION CITY: 'City'
GM: - GM RELATION PRMS: 'Premise' - GM RELATION ACCNT: 'Account'	The <b>Explorer</b> page would display links to the premise, line transformer, and city when viewing an electric meter.
LINE_TX: - LINE_TX RELATION FEEDER: 'Feeder'	

#### code block

description

PRMS: - PRMS | RELATION | ZIP: 'Postal Code'

CHILDREN\_POINTS: LINE\_TX: - EM|RELATION|LINE\_TX: 'Electric Meter'

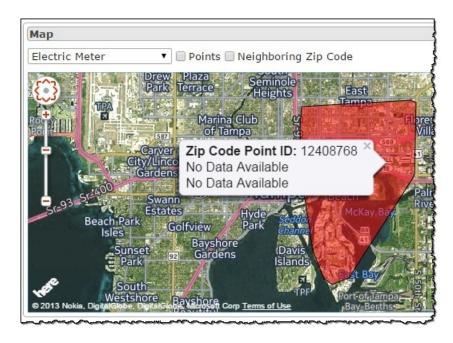
## **Configuring Map Popup Information**

Map Popup Information provides configuration for the balloons that open when the object of focus is clicked in the map. The configuration consists of the balloon background color, text color, border color, and what data is displayed.

NOTE: The table view will also display the same information as configured in the pop-up.



Only fact data can be displayed in the popup. For example, in contrast to the electric meter above, if a zip code did not have fact data, it could not display any data and the Point ID would be displayed along with No Data Available messages.



## Creating MAPS\_INFO\_POPUP Configuration

Point type code information pop-ups are configured from the Administer Configuration page.

**NOTE:** Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the MAPS\_INFO\_POPUP configuration. If it already exists, skip to *Accessing MAPS\_INFO\_POPUP XML*.

#### Click Add.

The Create Configuration dialog will open.

- 4. Complete the following fields:
  - a) Config Name: select MAPS\_RENDER\_AS from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example: "MAPS\_RENDER\_AS configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring MAPS\_INFO\_POPUP XML* for more information about the configuration options.

- d) Status: select Active.
- 5. Click Save.

## Accessing MAPS\_INFO\_POPUP XML

#### 1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

#### 2. From the Config Name drop-down list, select: MAPS\_INFO\_POPUP.

#### 3. Click Get Config.

The configuration will be displayed as a row in a data table.

#### Table 4: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Contains the following links:

Contains the following links:

View: opens the View Config popup dialog that allows you to view the configuration description.

**NOTE:** The popup displays the same information as displayed in the data table row.

#### Fields:

- Config ID: the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Role Type Code: the role's role type code.
- Config Name: the name of the selected configuration.
- Config Description: the description for the configuration.
- Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.
- Status: states whether the configuration is currently active or inactive.
- Create Time: the date and time when the configuration was created.
- **Update Time:** the date and time when the configuration was last updated.

Buttons:

- Edit: changes the dialog to the Manage Config view, which allows you to change the description and status.
- Cancel: closes the View Config dialog.

**Column Name** 

Description

Edit: opens the Manage Configuration dialog, which allows you to change the description and status.

XML: opens the Config XML dialog.

4. Click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

## Configuring MAPS\_INFO\_POPUP XML

#### **Configuration Code Structure**

The configuration code has the following general structure:

FTC: 'ATTRIBUTE' Label: "Address"

FTC: 'RELATION' Label: 'Postal Code'

FTC: 'RELATION'

ZIP:

BILL\_CYCLE:

code block	description
PointTypeCode1 GENERAL_SETTINGS: background_color: text_color: font: POINT_INFO: PTC RELATION RELATION_NAME: PTC LABEL LABEL_NAME:	<ul> <li>Each Point Type Code configuration includes five groupings of options:</li> <li>General Settings</li> <li>background_color: popup background color. The color can be defined by a hex color code or a standard color name.</li> </ul>
PointTypeCode2 configuration settings	<ul> <li>text_color: popup text color. color can be defined by a hex color code or a standard color name.</li> </ul>
	• font: size and font face for the popup text.
	Point Information
	<ul> <li>Relations: point type relations, as applicable.</li> </ul>
	Label: point type label, as applicable

# code block description GM: GENERAL\_SETTINGS: background\_color: '#ffffff' text\_color: '#000000' font: '14px arial' POINT\_INFO: STATUS: FTC: 'RELATION' Label: "Status" ADDRESS1:

code block

description

code block	description
Label: "Bill Cycle"	
LINE_TX:	LINE_TX: line transformer popup dialog display instructions.
GENERAL_SETTINGS:	
popup_background_color: 'light blue'	
popup_text_color: 'black'	
popup_font: '14px arial'	
POINT_INFO:	
CNT_DAILY_KWH_USAGE_AGG_TEST:	
Label: 'Meters per Transformer'	
FTC: 'NUM_ATTR'	
FEEDER:	
FTC: 'RELATION'	
Label: "Feeder"	
PHASE:	
FTC: 'ATTRIBUTE'	
Label: "Phase"	
EM:	EM: electric meter popup dialog display instructions.
GENERAL_SETTINGS:	
popup_background_color: 'light blue'	
popup_text_color: 'black'	
popup_font: '14px arial'	
POINT_INFO:	
STATUS:	
FTC: 'RELATION'	
Label: "Status"	
ADDRESS1:	
FTC: 'ATTRIBUTE'	
Label: "Address"	
ZIP:	
FTC: 'RELATION'	
Label: 'Postal Code'	
BILL_CYCLE:	BILL_CYCLE: electric popup dialog display instructions.
GENERAL_SETTINGS:	
<pre>background_color: '#ffffff'</pre>	
text_color: '#000000'	
font: '14px arial'	
POINT_INFO:	
LINE_TX:	
TTC: 'RELATION'	
Label: "Transformer"	
ZIP: GENERAL_SETTINGS:	ZIP: zip code popup dialog display instructions.
<pre>background_color: '#ffffff' toxt color: '#000000'</pre>	
text_color: '#000000'	
font: '14px arial'	
POINT_INFO:	
ZIP   RELATION	
LINE_TX: "Line Transformer"	
ZIP RELATION ZIP: "Zip Code"	
PRMS:	PRMS: premise popup dialog display instructions.
GENERAL_SETTINGS:	
background_color: '#ffffff'	
text color: '#000000'	
font: '14px arial'	
POINT_INFO:	
STD_PLACE:	
FTC: 'RELATION'	
Label: "STD_PLACE"	
TADET. DID FIACE	

## **Configuring Map Rendering**

Map rendering configuration determines how a point type code is displayed in the map panel. Point type codes with a discrete location are displayed as a pin-like pointer and point type codes that cover an area are displayed with a polygon. In this section outlines the options to configure display limits, area sizing, and default map options.

Configuration options include:

• Whether to render as point, area, or both.



• Default zoom value that sets the zoom level when the map opens for a selected object. Larger zoom values result in a view that is zoomed in. For example, the following image shows electric meter default values (from top to bottom) of 20, 16, and 8:

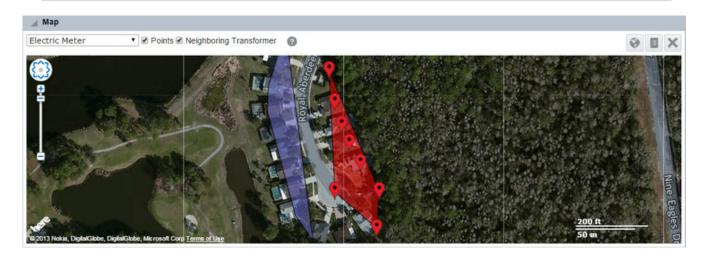


A zoom level of 16 is generally appropriate for discrete point types such as electric meters.

**NOTE:** The map scale control is not configurable

- Related point type codes.
- Background and border coloring for a selected object and its peers. For example, a line transformer is configured to be displayed as a red polygon, its related meters displayed as red pins, and its neighboring transformer is a purple polygon.

#### NOTE: The colors for pins, transformers, and neighboring transformers cannot be configured.



## **Creating MAPS\_RENDER\_AS Configuration**

Map rendering options are configured from the Administer Configuration page.

**NOTE:** Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the MAPS\_RENDER\_AS configuration. If it already exists, skip to *Accessing MAPS\_RENDER\_AS XML*.

Click Add.

The Create Configuration dialog will open.

- 4. Complete the following fields:
  - a) Config Name: select MAPS\_RENDER\_AS from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- **b)** Config Description: enter a description; for example: "MAPS\_RENDER\_AS configuration for the Call Center Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring MAPS\_RENDER\_AS XML* for more information about the configuration options.
- d) Status: select Active.

5. Click Save.

## Accessing MAPS\_RENDER\_AS XML

#### 1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

#### 2. From the Config Name drop-down list, select: MAPS\_RENDER\_AS.

3. Click Submit or click the Get Config button.

The configuration will be displayed as a row in a data table.

#### Table 5: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Contains the following links:

View: opens the View Configuration popup dialog that allows you to view the configuration description.

**NOTE:** The popup displays the same information as displayed in the data table row.

#### Fields:

- Config ID: the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Role Type Code: the role's role type code.
- Config Name: the name of the selected configuration.
- Config Description: the description for the configuration.
- Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.
- Status: states whether the configuration is currently active or inactive.
- **Create Time:** the date and time when the configuration was created.
- Update Time: the date and time when the configuration was last updated.

#### Buttons:

- Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.
- Cancel: closes the View Configuration dialog.

**Column Name** 

Description

Edit: opens the Manage Configuration dialog, which allows you to change the description and status.

XML: opens the Config XML dialog.

4. Click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

## Configuring MAPS\_RENDER\_AS XML

#### **Configuration Code Structure**

The configuration code has the following general structure:

**NOTE:** The code structure has been elongated in the left column so that the descriptions can remain near the associated code.

code block	description	
	Each Point Type Code configuration includes four groupings of options:	
PointTypeCode1 GENERAL_SETTINGS: related_point_types: default_zoom: peer_point_limit: polygon_point_limit: radius: show_point: show_area:	<ul> <li>General Settings</li> <li>metrics: what consumption values are available. This option is for future use.</li> <li>related_point_types: provides list of related point type codes, if applicable.</li> <li>default_zoom: defines what the map zoom should be for the point type.</li> <li>peer_point_limit: the maximum limit of peers points to display.</li> <li>peer_polygon_limit: the maximum limit of peer polygons that can be rendered on the map at given time.</li> </ul>	
	<ul> <li>polygon_point_limit: the maximum limit of points within a polygon than can be rendered on the map at a given time.</li> </ul>	
	<ul> <li>radius: In miles, the radius for which the map looks for peers around the center point. Currently not in use.</li> </ul>	
	<ul> <li>show_point: whether a point should be displayed for the selected point type (true  false); mutually exclusive with show_area.</li> </ul>	
	<ul> <li>show_area: whether an area should be displayed for the selected point type (true)</li> </ul>	

code block	description
	false); mutually exclusive with show_
	point.
CURRENT_POINT_RENDER_AS: style: background_color: border_color: text_color: font_size:	<ul> <li>Current Point Rendering         <ul> <li>style: style of bubble that will appear for the PTC. Currently not in use.</li> <li>background_color: background color of the point. The color can be defined by a hex color code or a standard color name. Currently not in use.</li> <li>border_color: point border color. The color can be defined by a hex color code or a standard color name. Currently not in use.</li> <li>text_color: color of text in bubble. Currently not in use.</li> </ul> </li> </ul>
	• font_size: font face and size of text in bubble. Currently not in use.
<pre>PEER_POINT_RENDER_AS:     style:     background_color:     border_color:     text_color:     font_size:</pre>	<ul> <li>Peer Point Rendering</li> <li>style: style of bubble that will appear for peer points. Currently not in use.</li> <li>background_color: background color of</li> </ul>
	the peer point. The color can be defined by a hex color code or a standard color name. Currently not in use.
	<ul> <li>border_color: peer point border color. The color can be defined by a hex color code or a standard color name. Currently not in use.</li> </ul>
	• text_color: color of text in bubble. Currently not in use.
	<ul> <li>font_size: font face and size of text in bubble. Currently not in use.</li> </ul>
RELATED_POINT_RENDER_AS: style: background_color: border_color: text_color: font_size:	<ul> <li>Related Point Rendering</li> <li>style: style of bubble that will appear for the related point. Currently not in use.</li> <li>background_color: background color of</li> </ul>
	the related point. The color can be defined by a hex color code or a standard color

• border\_color: point border color. The color can be defined by a hex color code or a standard color name. Currently not in use.

name. Currently not in use.

#### description

- text\_color: color of text in bubble. Currently not in use.
- font\_size: font face and size of text in bubble. Currently not in use.

PointTypeCode2 configuration settings...

#### code block

ription	

COUE DIOCK	description
<pre>EM: GENERAL_SETTINGS: metrics: related_point_types: default_zoom: '14' peer_point_limit: 5000 peer_polygon_limit: 1000 polygon_point_limit: 3000 radius: '50' show_point: 'true' show_area: 'false' CURRENT_POINT_RENDER_AS: style: 'bar_chart' background_color: '#ffffff' border_color: '#000000' text_color: 'red' font_size: '10' PEER_POINT_RENDER_AS: style: 'circle' background_color: '#fffff1' border_color: 'black' font_size: '10' RELATED_POINT_RENDER_AS: style: 'circle' background_color: '#FFF0000' border_color: '#000000' text_color: 'white' font_size: '10'</pre>	<ul> <li>EM: electric meter point rendering instructions.</li> <li>metrics: metrics are not in use.</li> <li>related_point_types: Electric Meters are related types.</li> <li>default_zoom: Default zoom is 14.</li> <li>peer_point_limit: Peer point limit is 5000 points.</li> <li>peer_polygon_limit: polygon limit is 1000 points.</li> <li>polygon_point_limit: polygon point limit is 3000 points.</li> <li>radius: Radius for neighboring points is 50 miles.</li> <li>show_point: It is a point.</li> <li>show_area: It is not a polygon</li> </ul>
<pre>LINE_TX: GENERAL_SETTINGS: metrics: related_point_types: EM LINE_TX POINT: Electric Meter default_zoom: '14' peer_point_limit: 5000 peer_polygon_limit: 1000 polygon_point_limit: 3000 radius: '50' show_point: 'false' show_area: 'show' CURRENT_POINT_RENDER_AS: style: 'bar_chart' background_color: '#FF0000' border_color: '#FF0000' text_color: 'red' font_size: '10' PEER_POINT_RENDER_AS: style: 'circle' background_color: '#7171d6' border_color: '#000000' text_color: 'black' font_size: '10' RELATED_POINT_RENDER_AS: style: 'circle'</pre>	<pre>LINE_TX: line transformer polygon and related point map rendering instructions.     metrics: metrics are not in use.     related_point_types: No related types.     default_zoom: Default zoom is 14.     peer_point_limit: Peer point limit is 5000 points.     peer_polygon_limit: polygon limit is 1000 points.     polygon_point_limit: polygon point limit is 3000 points.     radius: Radius for neighboring points is 50 miles.     show_point: It is not a point.     show_area: It is a polygon</pre>

#### code block

description

background\_color: '#7171d6' border\_color: '#000000' text\_color: 'white' font\_size: '10'

## **Configuring Detailed Point Information**

Detailed point information configuration controls which point metadata options will be displayed when viewing point details. These are global settings and will apply everywhere points are viewed.

Point information is defined in the *POINT\_INFO* configuration, which uses an HTML table format to allow customization for data displayed and layout. The HTML is used in two primary interface sections: point details and the point detail dialog box **Summary** tab.

	former : L	_0003355657	00				
Summary	Events	Algorithms	Attributes	Relations	Num Attributes	Segments	
Phase Point ID Feeder ID	C 1210 F000	)48 )003355657	Rating # of Meters	75			
							_
						Close	

# **Creating POINT\_INFO Configuration**

The point information is configured from the Administer Configuration page.

NOTE: Each Role must be configured separately.

- 1. Select the role to configure from the Role option in the Drawer Menu.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the POINT\_INFO configuration. If it already exists, skip to *Accessing POINT\_INFO XML*.

Click Add.

The Create Configuration dialog will open.

- **4.** Complete the following fields:
  - a) Config Name: select POINT\_INFO from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example, "POINT\_INFO configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring POINT\_INFO XML* for more information about the configuration options.
- d) Status: select Active.
- 5. Click Save.

# Accessing POINT\_INFO XML

Point Information is configured from the **Administer Configuration** page. Only administrative users can change configuration settings.

Each Role has its own configuration.

1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

### 2. From the Config Name drop-down list, select: POINT\_INFO

### 3. Click Get Config.

The configuration will be displayed as a row in a data table.

### Table 6: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Contains the following links:
	View: opens the View Configuration popup dialog that allows you to view the configuration description.
	<b>NOTE:</b> The popup displays the same information as displayed in the data table row.
	Fields:
	• Config ID: the system-generated identification number for the configuration.
	• Environment Name: the server environment name.
	• Role Type Code: the role's role type code.
	• Config Name: the name of the selected configuration.
	Config Description: the description for the configuration.
	<ul> <li>Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.</li> </ul>
	• Status: states whether the configuration is currently active or inactive.
	• Create Time: the date and time when the configuration was created.
	• <b>Update Time:</b> the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Configuration dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description and status.
	XML: opens the Config XML dialog.

4. In the data table row, click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

# Configuring POINT\_INFO XML

The point information configuration specifies the table structure and data requirements for each point type code.

### **Configuration Code Structure**

The configuration code has the following general structure:

```
PointTypeCode1
options:
FACTS
options_popup:
SUMMARY
FACTS
PointTypeCode2
options:
FACTS
options_popup:
SUMMARY
FACTS
```

🖌 Selected	Asset ID: EM00000	000009		
Status	Active	Point ID	1000	
Bill Cycle	09	Transformer	L000335563918	Additional Details

### Electric Meter : EM000000009

Status Device Status Point ID	Active Enable 1000	ed Dist	Cycle rict sformer	09 Hillsborough L00033556391	18		C
Summary	Events	Algorithms	Attributes	Relations	Num Attributes	Segments	

The options sections (under each point type code) control what is in the point details table on the pages [1]. Likewise, the options\_popup sections control what is in the point details dialog box **Summary** tab [2].

### **Point Details on Pages**

Variations in these elements can allow different placements of point data information elements. The "Label" items are the bold label that appears to the left of the information, and the "Value ID" is the fact lookup.

code block	description
EM:	The configuration begins with the name of the point type code ( <i>e.g.</i> , EM).
options:	The options: section contains a table that defines the structure of the Point Details information on a page (View Point Facts, Explore Point Data, and Point Data Export).
POINT_ID: Label: 'Point ID' FTC: 'POINT'	The table's POINT_ID: attribute is a target for scripts and stylesheets that produce the tables in the pages and dialog boxes.
STATUS: Label: 'Status' FTC: 'RELATION' LINE_TX: Label: 'Transformer' FTC: 'RELATION' BILL_CYCLE: Label: 'Bill Cycle'	STATUS:, LINE_TX:, and BILL_CYCLE: brings in these details to the point's information.

FTC: 'RELATION'

### **Point Information on Popup**

code block	description
options_popup:	The options_popup: section contains a table that defines the structure of the Point Detail dialog box. It is configured the same way as Point Details. The
<pre>POINT_ID: Label: 'Point ID' FTC: 'POINT' STATUS: Label: 'Status' FTC: 'RELATION' LINE_TX: Label: 'Transformer' FTC: 'RELATION' BILL_CYCLE: Label: 'Bill Cycle' FTC: 'RELATION' DISTRICT: Label: 'District' FTC: 'RELATION' SSN_DEVICE_STATUS: Label: 'Device Status' FTC: 'RELATION'</pre>	The remainder of the options_popup: section defines the associated information that will be displayed; including: • POINT_ID: • STATUS: • LINE_TX: • BILL_CYCLE: • DISTRICT: • SSN_DEVICE_STATUS:

# Chapter 10

# **Configuring Point Search Columns**

By updating the POINT\_SEARCH\_COLUMNS and applying it to a specific role(s), the Filter Results pane in the Explorer page can be configured to display specific fact data columns. As well, the order that the columns appear with the grid is specified through the structure of the code.

Show 10	•	entries		Searc	h:		
Point ID	© Asset ID	Asset Status	Rate Class	© Address	City	Postal Code	
451423	ER002	Active	RES 909898	204 Broadway Street	SAN FRANCISCO	94111	
451424	ER024	Active	RES 40390	4280 Torres Ave	Fremont	94536	
451425	ER023	Active	RES 40390	37659 Argyle Road	Fremont	94536	
451427	ER019	Active	COML 3498	801 Church Street	SAN FRANCISCO	94114	
451429	ER039	Active	RES 93645	160 Douglass Street	SAN FRANCISCO	94114	
151430	ER017	Active	RES 40390	846 Greenwich Street	SAN FRANCISCO	94133	
51431	ER003	Active	RES 909898	1 Saint Francis Place Apt 102	San Francisco	94107	
151433	ER038	Active	RES 909898	35 Mill Street	SAN FRANCISCO	94134	
151434	ER037	Active	COMS 1039	340 Ward Street	SAN FRANCISCO	94134	
451435	ER014	Active	COMS 1039	115 Gough Street	SAN FRANCISCO	94102	

The following section describes the options available.

# Creating POINT\_SEARCH\_COLUMN Configuration

The Filter Results data table column information is configured from the Administer Configuration page.

**NOTE:** Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the POINT\_SEARCH\_COLUMN configuration. If it already exists, skip to *Accessing POINT\_INFO XML*.

Click Add.

The Create Configuration dialog will open.

- **4.** Complete the following fields:
  - a) Config Name: select POINT\_SEARCH\_COLUMN from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- **b) Config Description**: enter a description; for example, "POINT\_SEARCH\_COLUMN configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring POINT\_INFO XML* for more information about the configuration options.
- d) Status: select Active.
- 5. Click Save.

# Accessing POINT\_SEARCH\_COLUMN XML

Point Information is configured from the **Administer Configuration** page. Only administrative users can change configuration settings.

Each Role has its own configuration.

1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

2. From the Config Name drop-down list, select: POINT\_SEARCH\_COLUMN

3. Click Get Config.

The configuration will be displayed as a row in a data table.

### Table 7: Administer Configuration Data Table

Column Name	Description
ID	Contains the system-generated identification number for the configuration.
Environment	The server environment name.
Role Type Code	The selected role's role type code. For example, the "Analytics" role has a Role Type Code of ANALYTICS. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.
Config Name	The name of the selected configuration.

Column Name	Description
Description	The description from the configuration definition.
Active	Shows whether the selected configuration is active or inactive
Create Time	The date and time when the configuration setting was created.
Update Time	The date and time when the configuration setting was last updated.
	Contains the following links:
	View: opens the View Configuration popup dialog that allows you to view the configuration description.
	<b>NOTE:</b> The popup displays the same information as displayed in the data table row.
	Fields:
	Config ID: the system-generated identification number for the configuration.
	Environment Name: the server environment name.
	Role Type Code: the role's role type code.
	Config Name: the name of the selected configuration.
	Config Description: the description for the configuration.
	<ul> <li>Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.</li> </ul>
	• Status: states whether the configuration is currently active or inactive.
	• Create Time: the date and time when the configuration was created.
	• Update Time: the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Configuration dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description and status.
	XML: opens the Config XML dialog.

4. In the data table row, click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

# Configuring POINT\_SEARCH\_COLUMN XML

The Explore page Filter Results column configuration specifies the table structure and data requirements for each grid column. The point search results column can be customized to show fact data as columns in the grid.

Show 10	• (	entries			Searc	h:	
Point ID	© Asset ID	Asset Status	Rate Class	Address	City	Postal Code	<
451423	ER002	Active	RES 909898	204 Broadway Street	SAN FRANCISCO	94111	
451424	ER024	Active	RES 40390	4280 Torres Ave	Fremont	94536	_
451425	ER023	Active	RES 40390	37659 Argyle Road	Fremont	94536	
451427	ER019	Active	COML 3498	801 Church Street	SAN FRANCISCO	94114	
451429	ER039	Active	RES 93645	160 Douglass Street	SAN FRANCISCO	94114	
151430	ER017	Active	RES 40390	846 Greenwich Street	SAN FRANCISCO	94133	
151431	ER003	Active	RES 909898	1 Saint Francis Place Apt 102	San Francisco	94107	
451433	ER038	Active	RES 909898	35 Mill Street	SAN FRANCISCO	94134	
451434	ER037	Active	COMS 1039	340 Ward Street	SAN FRANCISCO	94134	
451435	ER014	Active	COMS 1039	115 Gough Street	SAN FRANCISCO	94102	

### **Column Details within the Grid**

Variations in these elements can allow different placements of point data information elements in the grid. The columns are organized, from left to right in the grid, in the order that they are declared. The "Label" items are the bold label that appears to the left of the information, and the "Value ID" is the fact lookup. The POINT\_SEARCH\_COLUM configuration format is as follows:

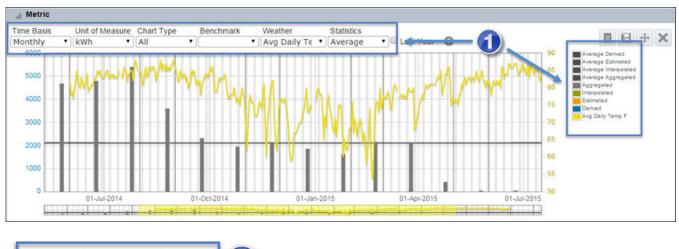
e configuration begins with the name of the nation of the name of the national type code (e.g., EM).
STANDARD: section controls base point item h as pointID, pointName, pointLookup, intTag, etc.
s section allows the grid to display these ns and label them as needed. In this example, name pointName as Asset ID because tomers are more familiar with that name.
er STANDARD:, the configuration lists fact kups with nested label and FTC sections.
his sample, STATUS is a fact lookup, Label ines the logical column name, and FTC is ition because STATUS is a relation type fact.
e grid supports both ATTRIBUTES and LATIONS.
<b>OTE:</b> STANDARD: should always be first, but ne order that the facts are declared defines to ne order of the columns of the UI grid.
e same format is then applied to all other uired PTCs.
<b>IOTE:</b> This configuration is optional. If it oes not exist, or is not defined properly, the rid will default to base options of pointID, ointLookup, etc.

# **Chapter 11**

# **Configuring Chart Panels (Rakes)**

Administrative users can configure which chart panels (rakes) and options are displayed on the *Explorer page* for each role, as selected in the *Drawer Menu*. **Explorer** configuration is defined in the *RAKE* configuration XML.

For a selected role, a point type code may have its own configuration definition, may share a configuration with another point type code, or, if not specifically defined, inherit the default configuration. For example, a Premise could have separate panel types and drop-down options than an Electric Meter while a Rate Class and a Supplier Rate Class might share a configuration and all may be different depending on the role that is selected.



### **Rake Components**

### Legend

Metric

Event

Man

**1.** Drop-down lists and corresponding data are determined by point type. The drop-down lists may be configurable or may automatically pull data based on the rake type. See individual rake descriptions for details.

**2.** The available rakes are defined by Role and Type.

### **Roles and Rakes**

Since each role is configured separately, it is possible that the rakes available for a point type code (for example, an electric meter) would be different in number and kind between roles. This flexibility allows the system to be tailored to the needs of different users.

# **Available Panels**

The panels that are provided for a selected role and point type code may be chosen from the available rake types.

Name	Description	User Types
Metric	The metric panel supports between one and five charts. The first main chart is controlled by the drop-down selections. The remainder of the charts are optional and are controlled directly from the configured facts. In addition to configuring facts, this panel's dropdown label and drop-down content is also configurable.	
Event	The event panel supports between one and five charts. The first main chart is controlled by the drop-down selections. The remainder of the charts are optional and are controlled directly from the configured facts. In addition to configuring facts, this panel's drop-down label and dropdown content is also configurable.	
Мар	The Map panel displays a geospatial representation of the data points. Point type codes with discrete locations (e.g., a meter) are indicated by a pin at the location; area point type codes (e.g., zip code, feeder, line transformer) are represented by a polygon.	All
	Configuration options:	
	<ul> <li>Map appearance and behavior are configured with MAPS_RENDER_AS and MAPS_ INFO_POPUP configuration.</li> </ul>	

# **Creating RAKE Configuration**

The Explore page configuration is defined in the RAKE configuration setting.

The page is configured from the Administer Configuration page.

NOTE: Each Role must be configured separately.

- 1. Select the role to configure from the **Role** option in the *Drawer Menu*.
- 2. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

**3. NOTE:** This step is only necessary if the **Config Name** list does not display the RAKE configuration. If it already exists, skip to *Accessing RAKE XML*.

### Click Add.

The Create Configuration dialog will open.

- **4.** Complete the following fields:
  - a) Config Name: select RAKE from the drop-down menu.

The Config Name list only contains the configuration settings that have not yet been defined.

- b) Config Description: enter a description; for example: "RAKE configuration for the Billing Role."
- **c)** Config XML: enter configuration XML in the field. If this code isn't complete, enter initial XML in the field as a placeholder while you develop the final version. See *Configuring Rakes to Open by Default* and *Configuring Standard and Combo Rakes* for more information about the configuration options.
- d) Status: select Active
- 5. Click Save.

# Accessing RAKE XML

1. Navigate through Administer > Metadata > Configuration.

The system will display the Administer Configuration page and display the results from the first Config Name menu option.

**NOTE:** The **Config Name** list contains configuration definitions that are available for the selected role; therefore, if the role that was selected doesn't have any definitions available, the system will return a message stating that no data was found.

2. From the Config Name drop-down list, select: RAKE

#### 3. Click Get Config.

The configuration will be displayed as a row in a data table.

#### Table 8: Administer Configuration Data Table

Column Name	Description	
ID	Contains the system-generated identification number for the configuration.	
Environment	The server environment name.	
Role Type Code	The selected role's role type code. For example, the "Safety" role has a Role Type Code of SAFETY. The role and role type codes may vary by implementation. To see the available roles and role type codes, select <b>Roles</b> under Security in the <b>Administer</b> menu.	
Config Name	The name of the selected configuration.	
Description	The description from the configuration definition.	
Active Shows whether the selected configuration is active or inactive		
Create Time	The date and time when the configuration setting was created.	
Update Time	The date and time when the configuration setting was last updated.	
	Contains the following links:	

Contains the following links:

 $\ensuremath{\textit{View}}$  opens the  $\ensuremath{\textit{View}}$  Configuration popup dialog that allows you to view the configuration description.

**NOTE:** The popup displays the same information as displayed in the data table row.

#### Fields:

- **Config ID:** the system-generated identification number for the configuration.
- Environment Name: the server environment name.
- Config Name: the name of the selected configuration.
- Config Description: the description for the configuration.
- Config XML: a link to the XML for the configuration; the XML may be viewed or edited by following the link.

Column Name	Description
	• <b>Status:</b> states whether the configuration is currently active or inactive.
	• Create Time: the date and time when the configuration was created.
	Update Time: the date and time when the configuration was last updated.
	Buttons:
	<ul> <li>Edit: changes the dialog to the Manage Configuration view, which allows you to change the description and status.</li> </ul>
	Cancel: closes the View Configuration dialog.
	Edit: opens the Manage Configuration dialog, which allows you to change the description and status.
	XML: opens the Config XML dialog.

4. Click the XML link.

The Config XML popup window will open with the configuration XML.

**5.** Click **Edit** to enable edit mode.

# **Configuring RAKE XML**

The RAKE configuration XML defines the panels (*i.e.*, rakes) that will appear for a point type code and the associated data and options for each rake.

### **Configuration Code Structure**

The configuration code has the following general structure:

```
default:
  configuration settings...
PointTypeCode1
  configuration settings...
PointTypeCode2
  configuration settings...
```

The default configuration is for any point type code that has not been configured. Every point type code that is configured may have unique settings.

For example, if electric meters have a point type code of EM and gas meters have a point type code of GM, then the configuration would have this structure:

```
default:
  configuration settings...
EM:
  configuration settings...
GM:
  configuration settings...
```

If, for example, FEEDER was not listed separately, it would inherit the default configuration.

## **Default Configuration for Unspecified Point Type Codes**

The default section defines the panels that will be displayed for point type codes that do not have defined configuration settings. For example, if there is no specific configuration called out for the Gas Meter type, it will inherit the default configuration.

#### Table 9: Default Block

code block	description
default: dropdown_view: label: 'View' options: - metricSuper: 'Metric' - eventSuper: 'Event' - map: 'Map'	<ul> <li>The default configuration is required. Add it above any point type code definitions.</li> <li>The dropdown_viewoptions lists the panels that will be displayed. The buttons to open the panels will be placed (from left to right) in the order listed.</li> </ul>

### **Configuring Rakes to Open by Default**

It is also possible to define the panels to open when a point is selected. This can be defined on a per role basis to allow different user types (such as, non-power users vs. power users) to have different views. The default\_open settings follows the drop-down\_view heading.

#### Table 10: Default Block with Default Open

code block	description
default_open: - metricSuper - eventSuper - map	• Under the dropdown_view heading in the <i>default</i> section, add a default_open section and list the panel names that you want to automatically be seen when opening the page or selecting a point. In this case, the metric panel will open automatically.
	There is no limit to how many panels can be opened.
	<ul> <li>Also note that the order in which they are listed is the order in which they will be added.</li> </ul>

### Default Section including the Default Open Subsection

code block	description
<pre>dropdown_view: label: 'View' options: - metricSuper: 'Metric' - eventSuper: 'Event' - map: 'Map' default_open: - metricSuper - eventSuper - map</pre>	

### **Configuring Standard and Combo Rakes**

### **Standard Rake Configuration**

After the default section, you need to define the configuration for every point type code that requires specific rakes. Additionally, you need to define the settings for the panels, as applicable.

Table 11: Configuration Settings and Description for an Electric Meter (Example)

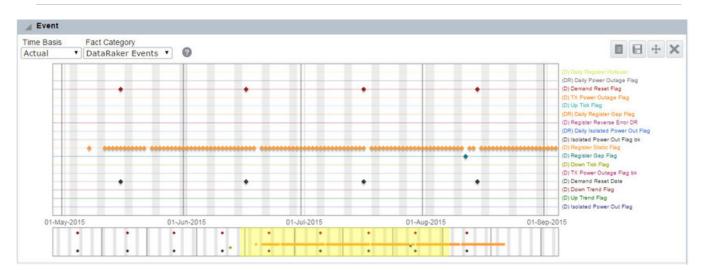
code block	description
EM:	The configuration begins with the name of the point type code (such as, ${\rm EM}).$
dropdown_view: label: 'View' options: - metricSuper: 'Metric' - eventSuper: 'Event' - map: 'Map'	The dropdow_view: and its corresponding options are no longer being used.
default_open: - metricSuper - eventSuper - map	Defines the rakes that will open by default. See <i>Configuring Rakes to Open by Default</i> for more information.

### **Combo Rake Configuration**

In addition to the standard panels, it is possible to configure combination panels that combine the charts and data into a single view. This is useful in combination with the default\_open setting to allow users to quickly see relevant information.

### **Event Panel**

The Event panel displays a combination of event flags and relations for the selected object. Events are categorized as Meter Events, which are received from data collection, Derived Events, which are identified by DataRaker core processes, or Lists, which are the results of an analytic calculation or test. The panel displays all available flags (top chart) and total flags observed (bottom chart) over time (weekends are shaded in grey).



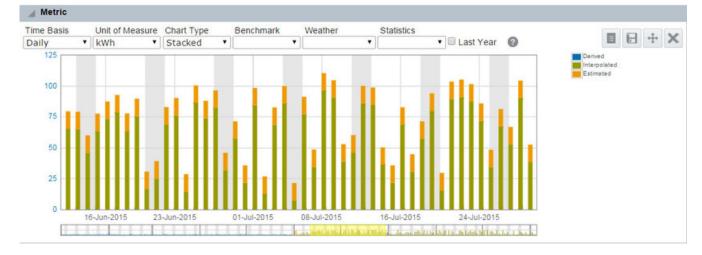
**NOTE:** Flags are indicated by diamonds.

### Table 12: Event Combo Panel

code block	description	
Event:		
Labels: Visible: True timeBasis: 'Time Basis'	The Labels: section allows you to define how the drop-down labels appear.	
actCategory: 'Fact Category' viewMode: 'View' fact_1: 'Fact Name'	The left parts are keys and <b>should not</b> be changed or removed.	
	The texts in quotes <b>can</b> be changed to whatever is desired to label the dropdown. The visible flag can be either true or false and defines whether any dropdown labels should be visible at all.	
DAILY: Selected: True Daily	DAILY: The sets of options are tiered by time basis (Second. Hourly, Daily, Etc)	
Chart1: View: Single:	• Selected determines whether Name: defines what appears in the drop-down menu.	
Enabled: True All: Selected: True Enabled: True	<ul> <li>Name: the name that will be displayed as an option.</li> </ul>	
Fact_Categories: kWh Register Validation: Name: 'kWh Register Validation Set' FTC: 'EVENT' # Fact Type Code, Required CUSTOM_SETS: My_Set:	There are a possibly total of five charts. Chart 1 is mandatory, but charts 2-5 are optional. For Chart 1, there are two types of fact sets that can be defined: Fact_Categories and CUSTOM_ SETS.	
Name: 'My Events' EVENT: Lookup1: 'Event1 Name' Lookup2: 'Event2 Name' hart2:	<ul> <li>Fact_Categories: use the fact category lookup as the first key, then nested under it define a friendly name and the Fact Type Code for FTC.</li> </ul>	
EVENT: DAILY_KWH_REGISTER_STATIC: 'Register Static' RELATION: ZIP: 'Zip' SEGMENT: chart3: EVENT: RELATION: LINE_TX: 'Line TX' SEGMENT:	• CUSTOM_SETS: declare each fact individually by lookup and friendly name. Each fact should be nested under its fact type; in the example here we place them under EVENT, but if they were relation type we would nest them under RELATION. Charts 2-5 are declared by fact type code, fact lookup, and friendly name.	

### **Metric Panel**

The Metric combo panel is a "super panel" that displays consumption and register data for the selected point. The consumption chart (top) displays daily data; the register data (middle) displays the register value reported or calculated for the day.



0	code	block	

#### description

code block	description	
Metric:	Metric: begins the configuration section.	
Labels: Visible: True timeBasis: 'Time Basis' factCategory: 'Unit of Measure' viewMode: 'Chart Type' fact_1: 'Data Type 1' fact_2: 'Data Type 2' benchmark: 'Benchmark' factTypeW: 'Weather' agg: 'Statistics'	The Labels: section allows you to define how the drop-down labels appear. The left parts are keys and <b>should not</b> be changed or removed. The text in quotes <b>can</b> be changed to whatever is desired to label the dropdown. The visible flag can be either true or false and defines whether any dropdown labels should be visible at all.	
DAILY: Selected: True Name: 'Daily'	The sets of options are tiered by time basis (Second. Hourly, Daily, Etc). Selected: determines whether Name: defines what appears in the drop-down menu. Name: the name that will be displayed as an option.	
Chart1: Height: 250 View: Enabled: True Double: Enabled: True All: Enabled: True Best: Selected: True Stacked: Enabled: True Fact_Categories: kWh: Selected: True Name: 'kWh' Facts: DAILY_KWH_USAGE_DERIVED: 'Derived' DAILY_KWH_USAGE_AGG: 'Aggregated' DAILY_KWH_USAGE_EST: 'Estimated' DAILY_KWH_USAGE_INTER: 'Interpolated Vrms: Name: 'Volt' Facts: DAILY_VRMS: 'Vrms' DAILY_VRMS_AGG: 'Aggregated Vrms'	<ul> <li>Chart1: has many options to configure.</li> <li>Height: controls the vertical height of the chart.</li> <li>View: controls the mode of the chart.</li> <li>Single: allows the section of one fact. Double: allows two different facts.</li> <li>All: shows every fact for a selected fact category in a side-by-side bar chart display.</li> <li>Best defines the "Best" option for the selected fact category.</li> <li>Stacked: is similar to All in that is shows all the facts for a given fact category, except the bars are displayed stacked on top of each other rather than side by side.</li> <li>NOTE:</li> <li>Each of these options can be disabled by setting Enabled to False. The 'selected' one will be the default.</li> </ul>	

code block

### description

<pre>Benchmark: LINE_TX: Name: 'Transformer' Facts: P90_DAILY_KWH_USAGE_DERIVED: Name: 'P95 Daily kWh Usage Derived' Color: 'Red' P10_DAILY_KWH_USAGE_DERIVED: Name: 'P5 Daily kWh Usage Derived' Color: 'Green' LP_CLASS: Name: 'LP Class' Facts: P90_DAILY_KWH_USAGE_AGG: Name: 'P90 Daily kWh Usage Aggr Color: 'Red' P10_DAILY_KWH_USAGE_AGG: Name: 'P10 Daily kWh Usage Aggr Color: 'Green'</pre>	such as line_tx from a meter level. The friendly name is configured along with the fact lookup of the parent relation, friendly name, as well as what color the benchmark line should use.	
Chart2: Height: 100 METRICS: ACTUAL_KWH_REGISTER: Name: 'Actual kWh Register' Color: 'Blue' ACTUAL_KWH_REGISTER_OVERLAP: Name: 'Actual kWh Register' Color: 'Green'	After Chart 1 is defined, there is an optional set of charts 2-5, all declared in a similar fashion. The Heighy is set and is followed by METRICS, which contain fact lookup coupled with a friendly name and color.	

# **Appendix: Code Templates**

### CHART\_SETTING Code Template

COLORS: factBasedColors: Aggregated: "rgb(0, 114, 169)" # blue Derived: "rgb(120, 120, 120)" # grey Estimated: "rgb(120, 120, 90)" # greyish green Interpolated: "rgb(238, 154, 0)" # orange eventColors: - "rgb(0, 0, 102)" - "rgb(0, 102, 0)" - "rgb(102, 0, 0)" - "rgb(32, 32, 32)" - "rgb(153, 0, 76)"
- "rgb(153, 153, 0)" - "rgb(0, 102, 102)" metricColors: - "rgb(236, 219, 24)" # yellow for chart (weather) - "rgb(181, 168, 24)" # yellow for Y labels (weather axis) - "rgb(135, 206, 250)" # blue for last year - "rgb(0, 114, 169)" # color1 for chart - "rgb(120, 120, 120)" # alt color: color2 for chart - "rgb(238, 154, 0)" # alt color: color3 for chart
- "rgb(120, 120, 90)" # alt color: color4 for chart - "rgb(238, 130, 0)" # alt color: color5 for chart - "rgb(120, 90, 120)" # alt color: color6 for chart - "rgb(215, 154, 0)" # alt color: color7 for chart - "rgb(77, 77, 77)" # MIN color - "rgb(77, 77, 77)" # MAX color - "rgb(77, 77, 77)" # MEDIAN color - "rgb(77, 77, 77)" # AVERAGE color - "rgb(190, 42, 42)" # 10th percentile color - "rgb(0, 238, 0)" # 90th percentile color - "rgb(190, 42, 42)" # low std dev color - "rgb(0, 238, 0)" # high std dev color bottomChartColors: - "rgb(9, 129, 154)" # light blue color for bottom chart series 1 - "rgb(178, 34, 34)" # red color for bottom chart series 2
- "rgb(0, 255, 127)" # green color for bottom chart series 3 - "rgb(147, 112, 219)" # purple color for bottom chart series 4

```
- "rgb(0, 0, 0)" # black for power outs
segmentColors:
- "rgb(0, 238, 0)"
- "rgb(190, 42, 42)"
- "rgb(0, 238, 0)"
- "rgb(190, 42, 42)"
highlightColor:
- "#FFFF00" # yellow color when dragging on a chart
```

## FILTER\_CONFIG Code Template

```
EM:
    - table: POINT
     label: 'Electric Meter Point ID'
     column: point_id
    - table: POINT
     label: 'Electric Meter ID'
     column: point_tag
    - table: POINT
     label: 'Electric Meter Name'
     column: point_name
    - table: FACT
      label: 'Bill Cycle'
     column: fact_lookup|BILL_CYCLE
    - table: FACT
      label: 'Line Transformer'
      column: fact_lookup|LINE_TX
GM:
    - table: POINT
      label: 'Gas Meter Point ID'
     column: point_id
    - table: POINT
      label: 'Gas Meter ID'
     column: point_tag
    - table: POINT
     label: 'Gas Meter Name'
column: point_name
    - table: FACT
     label: 'Bill Cycle'
      column: fact_lookup|BILL_CYCLE
WM:
    - table: POINT
      label: 'Water Meter Point ID'
     column: point_id
    - table: POINT
     label: 'Water Meter ID'
     column: point_tag
    - table: POINT
     label: 'Water Meter Name'
      column: point_name
    - table: FACT
     label: 'Bill Cycle'
      column: fact_lookup BILL_CYCLE
LINE_TX:
   - table: POINT
      label: 'Line Transformer Point ID'
     column: point_id
    - table: POINT
      label: 'Line Transformer ID'
     column: point_tag
    - table: POINT
      label: 'Line Transformer Name'
column: point_name
FEEDER:
```

- table: POINT label: 'Feeder Point ID' column: point\_id - table: POINT label: 'Feeder ID' column: point\_tag - table: POINT label: 'Feeder Name' column: point\_name BILL CYCLE: - table: POINT label: 'Bill Cycle Point ID'
column: point\_id - table: POINT label: 'Bill Cycle ID' column: point\_tag - table: POINT label: 'Bill Cycle Name' column: point\_name LP\_CLASS: - table: POINT label: 'Load Profile Class Point ID' column: point\_id - table: POINT label: 'Load Profile Class ID' column: point\_tag - table: POINT label: 'Load Profile Class Name' column: point\_name PRMS: - table: POINT label: 'Premise Point ID' column: point\_id table: POINT label: 'Premise ID' column: point\_tag - table: POINT label: 'Premise Name' column: point\_name ZIP: - table: POINT label: 'Zip Code Point ID' column: point\_id - table: POINT label: 'Zip Code ID' column: point\_tag - table: POINT label: 'Zip Code Name' column: point\_name RATE: - table: POINT label: 'Rate Point ID' column: point\_id - table: POINT label: 'Rate ID' column: point\_tag - table: POINT label: 'Rate Name' column: point\_name

# **GOTO\_INFO Code Template**

```
PARENT_POINTS:
   EM:
        - EM RELATION PRMS: 'Premise'
        - EM RELATION LINE_TX: 'Transformer'
    GM:
        - GM | RELATION | PRMS: 'Premise'
        - GM RELATION ACCNT: 'Account'
   LINE_TX:
        - LINE_TX | RELATION | FEEDER: 'Feeder'
    PRMS:
        - PRMS | RELATION | ZIP: 'Postal Code'
CHILDREN_POINTS:
   LINE_TX:
```

#### - EM|RELATION|LINE\_TX: 'Electric Meter'

# MAPS\_INFO\_POPUP Code Template

```
## Point Popup Info ##
GM:
    GENERAL_SETTINGS:
        background_color: '#ffffff'
         text_color: '#000000'
        font: '14px arial'
    POINT_INFO:
        STATUS:
            FTC: 'RELATION'
            Label: "Status"
         ADDRESS1:
            FTC: 'ATTRIBUTE'
            Label: "Address"
         ZIP:
             FTC: 'RELATION'
            Label: 'Postal Code'
         BILL_CYCLE:
            FTC: 'RELATION'
            Label: "Bill Cycle"
LINE TX:
    GENERAL_SETTINGS:
        popup_background_color: 'light blue'
        popup_text_color: 'black'
        popup_font: '14px arial'
    POINT INFO:
        CNT_DAILY_KWH_USAGE_AGG_TEST:
             Label: 'Meters per Transformer'
            FTC: 'NUM_ATTR'
         FEEDER:
            FTC: 'RELATION'
            Label: "Feeder"
         PHASE:
            FTC: 'ATTRIBUTE'
            Label: "Phase"
EM:
    GENERAL_SETTINGS:
        popup_background_color: 'light blue'
         popup_text_color: 'black'
        popup_font: '14px arial'
    POINT_INFO:
         STATUS:
            FTC: 'RELATION'
            Label: "Status"
         ADDRESS1:
            FTC: 'ATTRIBUTE'
            Label: "Address"
```

```
ZIP:
```

```
FTC: 'RELATION'
            Label: 'Postal Code'
BILL_CYCLE:
    GENERAL_SETTINGS:
       background_color: '#ffffff'
        text_color: '#000000'
       font: '14px arial'
    POINT_INFO:
       LINE_TX:
           FTC: 'RELATION'
            Label: "Transformer"
ZIP:
    GENERAL_SETTINGS:
       background_color: '#ffffff'
        text_color: '#000000'
       font: '14px arial'
    POINT_INFO:
       LINE_TX:
          FTC: 'RELATION'
           Label: "Transformer"
PRMS:
    GENERAL_SETTINGS:
       background_color: '#ffffff'
        text_color: '#000000'
        font: '14px arial'
    POINT_INFO:
       STD_PLACE:
            FTC: 'RELATION'
            Label: "STD_PLACE"
```

# MAPS\_RENDER\_AS Code Template

```
## Render As ##
EM:
    GENERAL_SETTINGS:
        metrics:
        related_point_types:
        default_zoom: '14'
        peer_point_limit: 5000
        peer_polygon_limit: 1000
        polygon_point_limit: 3000
        radius: '50'
        show_point: 'true'
        show_area: 'false'
    CURRENT_POINT_RENDER_AS:
        style: 'bar_chart'
        background_color: '#ffffff'
        border_color: '#000000'
        text_color: 'red'
        font_size: '10'
    PEER_POINT_RENDER_AS:
        style: 'circle'
        background_color: '#fffff1'
        border_color: '#000000'
        text_color: 'black'
        font_size: '10'
    RELATED_POINT_RENDER_AS:
        style: 'circle'
        background_color: '#FF0000'
        border_color: '#000000'
        text_color: 'white'
        font_size: '10'
LINE_TX:
    GENERAL_SETTINGS:
```

```
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```

```
metrics:
    related_point_types:
        EM|LINE_TX|POINT:
           Electric Meter
    default_zoom: '14'
    peer_point_limit: 5000
    peer_polygon_limit: 1000
    polygon_point_limit: 3000
    radius: '50'
    show_point: 'false'
   show area: 'show'
CURRENT_POINT_RENDER_AS:
    style: 'bar_chart'
    background_color: '#FF0000'
   border_color: '#000000'
    text_color: 'red'
   font_size: '10'
PEER_POINT_RENDER_AS:
    style: 'circle'
    background_color: '#7171d6'
    border_color: '#000000'
    text_color: 'black'
    font_size: '10'
RELATED_POINT_RENDER_AS:
    style: 'circle'
    background_color: '#7171d6'
    border_color: '#000000'
    text_color: 'white'
    font_size: '10'
```

# **POINT\_INFO Code Template**

```
EM:
    options:
            POINT_ID:
                Label: 'Point ID'
                FTC: 'POINT'
            STATUS:
               Label: 'Status'
                FTC: 'RELATION'
            LINE_TX:
                Label: 'Transformer'
                FTC: 'RELATION'
            BILL_CYCLE:
                Label: 'Bill Cycle'
                FTC: 'RELATION'
    options_popup:
            POINT_ID:
                Label: 'Point ID'
                FTC: 'POINT'
            STATUS:
                Label: 'Status'
                FTC: 'RELATION'
            LINE_TX:
                Label: 'Transformer'
                FTC: 'RELATION'
            BILL_CYCLE:
                Label: 'Bill Cycle'
                FTC: 'RELATION'
            DISTRICT:
                Label: 'District'
                FTC: 'RELATION'
            SSN_DEVICE_STATUS:
                Label: 'Device Status'
                FTC: 'RELATION'
```

```
LINE_TX:
```

```
options:
        PHASE:
            Label: 'Phase'
           FTC: 'ATTRIBUTE'
        POINT_ID:
           Label: 'Point ID'
            FTC: 'POINT'
        FEEDER:
            Label: 'Feeder ID'
            FTC: 'RELATION'
        RATING:
            Label: 'Rating'
            FTC: 'NUM_ATTR'
        CNT_DAILY_KWH_USAGE_AGG_TEST:
           Label: '# of Meters'
            FTC: 'NUM ATTR'
        INSTALLATION_DT:
           Label: 'Installation Date'
            FTC: 'ATTRIBUTE'
options_popup:
        PHASE:
            Label: 'Phase'
            FTC: 'ATTRIBUTE'
        POINT_ID:
           Label: 'Point ID'
            FTC: 'POINT'
        FEEDER:
            Label: 'Feeder ID'
            FTC: 'RELATION'
        RATING:
           Label: 'Rating'
            FTC: 'NUM_ATTR'
        CNT_DAILY_KWH_USAGE_AGG_TEST:
            Label: '# of Meters'
            FTC: 'NUM_ATTR'
```

# POINT\_SEARCH\_COLUMN Code Template

```
EM:
    - STANDARD:
       pointID: 'Point ID'
       pointName: 'Asset ID'
    - STATUS:
       Label: 'Asset Status'
       FTC: 'RELATION'
    - RATE:
       Label: 'Rate Class'
       FTC: 'RELATION'
    - ADDRESS1:
       Label: 'Address'
       FTC: 'ATTRIBUTE'
    - GEO_CITY:
       Label: 'City'
       FTC: 'ATTRIBUTE'
    - GEO_ZIP:
       Label: 'Postal Code'
       FTC: 'RELATION'
LINE_TX:
    - STANDARD:
       pointID: 'Point ID'
       pointName: 'Asset ID'
    - RATING:
       Label: 'Rating'
       FTC: NUM_ATTR
```

```
PHASE:
Label: 'Phase'
FTC: 'ATTRIBUTE'
INSTALLATION_DT:
Label: 'Installation Date'
FTC: 'ATTRIBUTE'
FEEDER:
Label: 'Feeder'
FTC: 'RELATION'
```

## **RAKE Code Template**

```
#### EM ####
EM:
    # 'Add Panel' dropdown options - These are available panels for this ptc
    dropdown_view:
        label: 'View'
        options:
             - metricSuper: 'Metric'
             - eventSuper: 'Event'
             - map: 'Map'
        default_open:
            - metricSuper
             - eventSuper
             - map
    # Super Metric Panel Config
    Metric:
        Labels:
             Visible: True
             timeBasis: 'Time Basis'
             factCategory: 'Units of Measure'
             viewMode: 'Chart Type'
             fact_1: 'Data Type 1'
             fact_2: 'Data Type 2'
            benchmark: 'Benchmark'
factTypeW: 'Weather'
             agg: 'Statistics'
        DAILY:
            Selected: True
             Name: 'Daily'
             Chart1:
                 Height: 250
                 View:
                     Single:
                         Enabled: True
                     Double:
                         Enabled: True
                     All:
                         Enabled: True
                     Best:
                         Selected: True
                          Enabled: True
                     Stacked:
                          Enabled: True
                 Fact_Categories:
                     kWh:
                          Selected: True
                          Name: 'kWh'
                          Facts:
                              DAILY_KWH_USAGE_DERIVED: 'Derived'
                              DAILY_KWH_USAGE_AGG: 'Aggregated'
DAILY_KWH_USAGE_EST: 'Estimated'
                              DAILY_KWH_USAGE_INTER: 'Interpolated'
                     Vrms:
                          Name: 'Volt'
                          Facts:
                              DAILY_VRMS: 'Vrms'
                              DAILY_VRMS_AGG: 'Aggregated Vrms'
```

```
Benchmark:
        LINE_TX:
            Name: 'Transformer'
            Facts:
                P90_DAILY_KWH_USAGE_DERIVED:
                    Name: 'P95 Daily kWh Usage Derived'
                    Color: 'Red'
                P10_DAILY_KWH_USAGE_DERIVED:
                    Name: 'P5 Daily kWh Usage Derived'
                    Color: 'Green'
        LP_CLASS:
            Name: 'LP Class'
Facts:
                P90_DAILY_KWH_USAGE_AGG:
                    Name: 'P90 Daily kWh Usage Aggregated'
Color: 'Red'
                P10_DAILY_KWH_USAGE_AGG:
                    Name: 'P10 Daily kWh Usage Aggregated'
                    Color: 'Green'
    Chart2:
        Height: 100
        METRICS:
            #ACTUAL_KWH_REGISTER:
                 Name: 'Actual kWh Register'
            #
                 Color: 'Blue'
            #
            #ACTUAL_KWH_REGISTER_OVERLAP:
               Name: 'Actual kWh Register Overlap'
            #
                 Color: 'Green'
            #
        COUNTS:
            DAILY_POWER_OUT_CNT:
                Name: 'Power Outages'
                Color: 'Black'
    Chart3:
        Height: 50
        METRICS:
            #ACTUAL_VRMS:
                Name: 'Actual VRMS'
            #
                Color: 'Purple'
            #
MONTHLY:
   Name: 'Monthly'
    Chart1:
        Height: 250
        View:
            Single:
                Enabled: True
            Double:
                Enabled: True
            All:
                Selected: True
                Enabled: True
            Best:
                Enabled: True
            Stacked:
                Enabled: True
        Fact_Categories:
            kWh:
                Selected: True
                Name: 'kWh'
                Facts:
                    MONTHLY_SUM_DAILY_KWH_USAGE_DERIVED: 'Derived'
                    MONTHLY_SUM_DAILY_KWH_USAGE_AGG: 'Aggregated'
    Chart2:
        Height: 50
        METRICS:
WEEKLY:
    Name: 'Weekly'
    Chart1:
        Height: 250
        View:
```

Single: Enabled: True Double: Enabled: True All: Selected: True Enabled: True Best: Enabled: True Stacked: Enabled: True Fact\_Categories: kWh∶ Selected: True Name: 'kWh' Facts: WEEKLY\_SUM\_DAILY\_KWH\_USAGE\_DERIVED: 'Derived' WEEKLY\_SUM\_DAILY\_KWH\_USAGE\_AGG: 'Aggregated' Chart2: Height: 50 METRICS: INT\_3600: Name: 'Hourly' Chart1: Height: 300 View: Single: Enabled: True Double: Enabled: True All: Enabled: True Best: Selected: True Enabled: True Stacked: Enabled: True Fact\_Categories: kWh: Name: 'kWh' Facts: INT\_3600\_KWH\_USAGE: 'Usage' # # INT\_3600\_KWH\_USAGE\_DERIVED: 'Derived' Chart2: Height: 150 METRICS: #INT\_3600\_KWH\_USAGE\_RAW: Name: 'Houly kWh Raw Consumption' Color: 'Blue' # # INT\_1800: Name: '30 Minute' Chart1: Height: 300 View: Single: Enabled: True Double: Enabled: True All: Enabled: True Best: Selected: True Enabled: True Stacked: Enabled: True Fact\_Categories: kWh: Name: 'kWh' Facts:

```
INT_1800_KWH_USAGE: 'Usage'
        Chart2:
            Height: 50
            METRICS:
    INT_900:
        Name: '15 Minute'
        Chart1:
            Height: 300
            View:
                 Single:
                     Enabled: True
                 Double:
                     Enabled: True
                 All:
                     Enabled: True
                 Best:
                     Selected: True
                     Enabled: True
                 Stacked:
                     Enabled: True
            Fact_Categories:
                 kWh:
                     Name: 'kWh'
                     Facts:
                         INT_900_KWH_USAGE_DEP: 'Usage'
        Chart2:
            Height: 50
            METRICS:
# Super Event/Relation/Segment Panel Config
Event:
    Labels:
        Visible: True
        timeBasis: 'Time Basis'
        factCategory: 'Fact Category'
        viewMode: 'View'
        fact_1: 'Fact Name'
    SECOND:
        Selected: True
        Name: 'Actual'
        Chart1:
            View:
                 Single:
                     Enabled: True
                 A11:
                     Selected: True
                     Enabled: True
             Fact_Categories:
                 #Event:
                     #Name: 'Event'
                     #FTC: 'EVENT' # Fact Type Code, Required
             CUSTOM_SETS:
                 Meter_Set:
                     Name: 'Meter Events'
                     EVENT:
                          (GS)_STANDBY_ACCUMULATION_ERROR: '(GS) Standby Accumulation Error'
                          (GS)_ENDPOINT_TIME_SYNCHRONIZATION: '(GS) Endpoint Time Synchronization'
                          (GS)_LEADING_KVARH: '(GS) Leading kvarh'
                          (GS)_VOLTAGE_MAX_THRESHOLD: '(GS) Voltage Max Threshold'
                          (GS)_RECEIVED_KWH: '(GS) Received kWh'
                          (GS)_FIRMWARE_DEBUG_1: '(GS) Firmware Debug 1'
                          (GS)_TIME_ADJUSTMENT_ERROR: '(GS) Time Adjustment Error'
(GS)_VOLTAGE_MIN_THRESHOLD: '(GS) Voltage Min Threshold'
                          (GS)_EXCEEDS_THE_MAXIMUM_ALLOWABLE_LAYERS_EVENT: '(GS) Exceeds the maximum al
                          (GS)_DCW_PRE-EMPTED_OR_REMOVED: '(GS) DCW pre-empted or removed'
                          (GS)_ENDPOINT_POWER_OUTAGE: '(GS) Endpoint Power Outage'
                          (GS)_RF_SYSTEM_STATUS_UPDATED: '(GS) RF System status updated'
```



```
# 'Add Panel' dropdown options - These are available panels for this ptc
    dropdown_view:
        label: 'View'
        options:
            - metricSuper: 'Metric'
            - map: 'Map'
        default_open:
            - metricSuper
            - map
    # Super Metric Panel Config
    Metric:
        Labels:
            Visible: True
            timeBasis: 'Time Basis'
            factCategory: 'Units of Measure'
            viewMode: 'Chart Type'
            fact_1: 'Data Type 1'
            fact_2: 'Data Type 2'
            benchmark: 'Benchmark'
factTypeW: 'Weather'
            agg: 'Statistics'
        DAILY:
            Selected: True
            Name: 'Daily'
            Chart1:
                Height: 250
                View:
                    Single:
                         Enabled: True
                    Double:
                        Enabled: True
                    All:
                         Selected: True
                         Enabled: True
                    Best:
                         Enabled: True
                    Stacked:
                         Enabled: True
                Fact_Categories:
                    kWh Avg:
                         Selected: True
                         Name: 'kWh'
                         Facts:
                             AVG_DAILY_KWH_USAGE_DERIVED: 'Avg Daily kWh Derived'
            Chart2:
                Height: 50
                METRICS:
                     #ACTUAL_VRMS:
                         Name: 'Actual VRMS'
Color: 'Purple'
                     #
                     #
#### ZIP CODE ####
ZIP:
    # 'Add Panel' dropdown options - These are available panels for this ptc
    dropdown_view:
        label: 'View'
        options:
            - metricSuper: 'Metric'
        default_open:
            - metricSuper
    # Super Metric Panel Config
    Metric:
        Labels:
            Visible: True
            timeBasis: 'Time Basis'
            factCategory: 'Units of Measure'
            viewMode: 'Chart Type'
            fact_1: 'Data Type 1'
            fact_2: 'Data Type 2'
            benchmark: 'Benchmark'
            factTypeW: 'Weather'
```

agg: 'Statistics'