
SEED Platform Documentation

Release 2.10.0

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Mar 31, 2021

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The Standard Energy Efficiency Data (SEED) Platform™ is a web-based application that helps organizations easily manage data on the energy performance of large groups of buildings. Users can combine data from multiple sources, clean and validate it, and share the information with others. The software application provides an easy, flexible, and cost-effective method to improve the quality and availability of data to help demonstrate the economic and environmental benefits of energy efficiency, to implement programs, and to target investment activity.

The SEED application is written in Python/Django, with AngularJS, Bootstrap, and other JavaScript libraries used for the front-end. The back-end database is required to be PostgreSQL.

The SEED web application provides both a browser-based interface for users to upload and manage their building data, as well as a full set of APIs that app developers can use to access these same data management functions.

Work on SEED Platform is managed by the National Renewable Energy Laboratory, with funding from the U.S. Department of Energy.

GETTING STARTED

1.1 Development Setup

1.1.1 Installation on OSX

These instructions are for installing and running SEED on Mac OSX in development mode.

Quick Installation Instructions

This section is intended for developers who may already have their machine ready for general development. If this is not the case, skip to Prerequisites. Note that SEED uses python 3.

- install Postgres 11.1 and redis for cache and message broker
- install PostGIS 2.5 and enable it on the database using *CREATE EXTENSION postgis;*
- install TimescaleDB 1.5.0
- use a virtualenv (if desired)
- *git clone git@github.com:seed-platform/seed.git*
- create a *local_untracked.py* in the *config/settings* folder and add CACHE and DB config (example *local_untracked.py.dist*)
- to enable geocoding, get MapQuest API key and attach it to your organization
- *export DJANGO_SETTINGS_MODULE=config.settings.dev* in all terminals used by SEED (celery terminal and runserver terminal)
- ***pip install -r requirements/local.txt***
 - for conda's python, you may need to run this command to get pip install to succeed: *conda install -c conda-forge python-crfsuite*
- *npm install*
- *./manage.py migrate*
- *./manage.py create_default_user*
- *./manage.py runserver*
- *DJANGO_SETTINGS_MODULE=config.settings.dev celery -A seed worker -l info -c 4 --maxtasksper-child=1000 --events*
- navigate to *http://127.0.0.1:8000/app/#/profile/admin* in your browser to add users to organizations
- main app runs at *127.0.0.1:8000/app*

The `python manage.py create_default_user` will setup a default *superuser* which must be used to access the system the first time. The management command can also create other superusers.

```
./manage.py create_default_user --username=demo@seed.lbl.gov --organization=lbl --  
↪password=demo123
```

Prerequisites

These instructions assume you have [MacPorts](#) or [Homebrew](#). Your system should have the following dependencies already installed:

- `git` (*port install git* or *brew install git*)
- `graphviz` (*brew install graphviz*)
- `pyenv` (Recommended)

Note: Although you *could* install Python packages globally, this is the easiest way to install Python packages. Setting these up first will help avoid polluting your base Python installation and make it much easier to switch between different versions of the code.

```
brew install pyenv  
pyenv install <python3 version you want>  
pyenv virtualenv <python3 version you want> seed  
pyenv local seed
```

PostgreSQL 11.1

MacPorts:

```
sudo su - root  
port install postgresql94-server postgresql94 postgresql94-doc  
# init db  
mkdir -p /opt/local/var/db/postgresql94/defaultdb  
chown postgres:postgres /opt/local/var/db/postgresql94/defaultdb  
su postgres -c '/opt/local/lib/postgresql94/bin/initdb -D /opt/local/var/db/  
↪postgresql94/defaultdb'  
  
# At this point, you may want to add start/stop scripts or aliases to  
# ~/.bashrc or your virtualenv ``postactivate`` script  
# (in ``~/.virtualenvs/{env-name}/bin/postactivate``).  
  
alias pg_start='sudo su postgres -c "/opt/local/lib/postgresql94/bin/pg_ctl \  
-D /opt/local/var/db/postgresql94/defaultdb \  
-l /opt/local/var/db/postgresql94/defaultdb/postgresql.log start"  
alias pg_stop='sudo su postgres -c "/opt/local/lib/postgresql94/bin/pg_ctl \  
-D /opt/local/var/db/postgresql94/defaultdb stop"  
  
pg_start  
  
sudo su - postgres  
PATH=$PATH:/opt/local/lib/postgresql94/bin/
```

Homebrew:


```
brew install postgres
# follow the post install instructions to add to launchagents or call
# manually with `postgres -D /usr/local/var/postgres`
# Skip the remaining Postgres instructions!
```

Configure PostgreSQL. Replace ‘seeddb’, ‘seeduser’ with desired db/user. By default use password *seedpass* when prompted. Use the code block below in development only since the seeduser is a SUPERUSER.

```
createuser -P seeduser
createdb `whoami`
psql -c 'CREATE DATABASE "seeddb" WITH OWNER = "seeduser";'
psql -c 'GRANT ALL PRIVILEGES ON DATABASE "seeddb" TO seeduser;'
psql -c 'ALTER ROLE seeduser SUPERUSER;'
```

PostGIS 2.5

MacPorts:

```
# Assuming you're still root from installing PostgreSQL,
port install postgis2
```

Homebrew:

```
brew install postgis
```

Configure PostGIS:

```
psql -d seeddb -c "CREATE EXTENSION postgis;"

# For testing, give seed user superuser access:
# psql -c 'ALTER USER seeduser CREATEDB;'
```

If upgrading from an existing database or existing `local_untracked.py` file, make sure to add the MapQuest API Key and set the database engine to ‘ENGINE’: ‘django.contrib.gis.db.backends.postgis’.

Now exit any root environments, becoming just yourself (even though it’s not that easy being green), for the remainder of these instructions.

TimescaleDB 1.5.0

Note, as of version 1.5.0, dumping and restoring databases requires that both the source and target database have the same version of TimescaleDB.

Downloading From Source:

```
# Note: Installing from source should only be done
# if you have a Postgres installation not maintained by Homebrew.
# This installation requires C compiler (e.g., gcc or clang) and CMake version 3.4 or
# greater.

git clone https://github.com/timescale/timescaledb.git
cd timescaledb
git checkout 1.5.0

# Bootstrap the build system
```

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```
./bootstrap

# If OpenSSL can't be found by cmake - run the following instead
# ./bootstrap -DOPENSSL_ROOT_DIR=<location of OpenSSL> # e.g., -DOPENSSL_ROOT_DIR=/
→usr/local/opt/openssl

# To build the extension
cd build && make

# To install
make install

# Find postgresql.conf
# Then uncomment the shared_preload_libraries line changing it to the following
# shared_preload_libraries = 'timescaledb'
psql -d postgres -c "SHOW config_file;"

# Restart PostgreSQL instance
```

Python Packages

Run these commands as your normal user id.

Change to a virtualenv (using virtualenvwrapper) or do the following as a superuser. A virtualenv is usually better for development. Set the virtualenv to seed.

```
workon seed
```

Make sure PostgreSQL command line scripts are in your PATH (if using MacPorts)

```
export PATH=$PATH:/opt/local/lib/postgresql94/bin
```

Some packages (uWSGI) may need to find your C compiler. Make sure you have ‘gcc’ on your system, and then also export this to the CC environment variable:

```
export CC=gcc
```

Install requirements with *pip*

```
pip install -r requirements/local.txt
```

NodeJS/npm

Install [npm](#). You can do this by installing from [nodejs.org](#), MacPorts, or Homebrew:

MacPorts:

```
sudo port install npm
```

Homebrew:

```
brew install npm
```

Configure Django and Databases

In the `config/settings` directory, there must be a file called `local_untracked.py` that sets up databases and a number of other things. To create and edit this file, start by copying over the template

```
cd config/settings
cp local_untracked.py.dist local_untracked.py
```

Edit `local_untracked.py`. Open the file you created in your favorite editor. The PostgreSQL config section will look something like this:

```
# postgres DB config
DATABASES = {
    'default': {
        'ENGINE': 'django.contrib.gis.db.backends.postgis',
        'NAME': 'seeddb',
        'USER': 'seeduser',
        'PASSWORD': 'seedpass',
        'HOST': 'localhost',
        'PORT': '5432',
    }
}
```

You may want to comment out the AWS settings.

For Redis, edit the `CACHES` and `CELERY_BROKER_URL` values to look like this:

```
CACHES = {
    'default': {
        'BACKEND': 'redis_cache.cache.RedisCache',
        'LOCATION': "127.0.0.1:6379",
        'OPTIONS': {'DB': 1},
        'TIMEOUT': 300
    }
}
CELERY_BROKER_URL = 'redis://127.0.0.1:6379/1'
```

MapQuest API Key

Register for a MapQuest API key: https://developer.mapquest.com/plan_purchase/steps/business_edition/business_edition_free/register

Visit the Manage Keys page: <https://developer.mapquest.com/user/me/apps> Either create a new key or use the key initially provided. Copy the “Consumer Key” into the target organizations MapQuest API Key field under the organization’s settings page or directly within the DB.

Run Django Migrations

Change back to the root of the repository. Now run the migration script to set up the database tables

```
export DJANGO_SETTINGS_MODULE=config.settings.dev
./manage.py migrate
```

Django Admin User

You need a Django admin (super) user.

```
./manage.py create_default_user --username=admin@my.org --organization=seedorg --
↳password=badpass
```

Of course, you need to save this user/password somewhere, since this is what you will use to login to the SEED website.

If you want to do any API testing (and of course you do!), you will need to add an API KEY for this user. You can do this in postgresql directly:

```
psql seeddb seeduser
seeddb=> update landing_seeduser set api_key='DEADBEEF' where id=1;
```

The ‘secret’ key DEADBEEF is hard-coded into the test scripts.

Install Redis

You need to manually install Redis for Celery to work.

MacPorts:

```
sudo port install redis
```

Homebrew:

```
brew install redis
# follow the post install instructions to add to launchagents or
# call manually with `redis-server`
```

Install JavaScript Dependencies

The JS dependencies are installed using node.js package management (npm).

```
npm install
```

Start the Server

You should put the following statement in `~/.bashrc` or add it to the `virtualenv` post-activation script (e.g., in `~/.virtualenvs/seed/bin/postactivate`).

```
export DJANGO_SETTINGS_MODULE=config.settings.dev
```

The combination of Redis, Celery, and Django have been encapsulated in a single shell script, which examines existing processes and does not start duplicate instances:

```
./bin/start-seed.sh
```

When this script is done, the Django stand-alone server will be running in the foreground.

Login

Open your browser and navigate to `http://127.0.0.1:8000`

Login with the user/password you created before, e.g., `admin@my.org` and `badpass`.

Note: these steps have been combined into a script called `start-seed.sh`. The script will also not start Celery or Redis if they already seem to be running.

1.1.2 Installation using Docker

Docker works natively on Linux, Mac OSX, and Windows 10. If you are using an older version of Windows (and some older versions of Mac OSX), you will need to install Docker Toolbox.

Choose either *Docker Native (Windows/OSX)* or *Docker Native (Ubuntu)* to install Docker.

Docker Native (Ubuntu)

Follow instructions [here](#).

- [Install Docker Compose](#)

Docker Native (Windows/OSX)

Following instructions [for Mac](#) or [for Windows](#).

- [Install Docker Compose](#)

Building and Running Containers for Non-Development

- Run Docker Compose

```
docker-compose build
```

Be Patient ... If the containers build successfully, then start the containers

```
docker volume create --name=seed_pgdata
docker volume create --name=seed_media
docker-compose up
```

Note that you may need to build the containers a couple times for everything to converge

- Login to container

The docker-compose file creates a default user and password. Below are the defaults but can be overridden by setting environment variables.

```
username: user@seed-platform.org
password: super-secret-password
```

Note: Don't forget that you need to reset your default username and password if you are going to use these Docker images in production mode!

Using Docker for Development

The development environment is configured for live reloading (ie restart webserver when files change) and debugging. It builds off the base docker-compose.yml, so it's necessary to specify the files being used in docker-compose commands as seen below.

Build

```
# create volumes for the database and media directory
docker volume create --name=seed_pgdata
docker volume create --name=seed_media

# build the images
docker-compose -f docker-compose.yml -f docker-compose.dev.yml build
```

Running the Server

NOTE: the server config is sourced from config.settings.docker_dev, which will include your local_untracked.py if it exists. If you have a local_untracked.py, make sure it doesn't overwrite the database or celery configuration!

```
docker-compose -f docker-compose.yml -f docker-compose.dev.yml up
```

If the server doesn't start successfully, and `docker-compose logs` doesn't help, the django development server probably failed to start due to an error in your config or code. Unfortunately docker/django logging doesn't appear to work when the container is first started. Just try running the server yourself with `docker exec`, and see what the output is.

The development docker-compose file has some configurable parameters for specifying volumes to use:

- SEED_DB_VOLUME: the name of the docker volume to mount for postgres
- SEED_MEDIA_VOLUME: the name of the docker volume to mount for the seed media folder

Docker will use environment variables from the shell or from a .env file to set these values.

This is useful if you want to switch between different databases for testing. For example, if you want to create a separate volume for storing a production backup, you could do the following

```
docker volume create --name=seed_pgdata_prod
SEED_DB_VOLUME=seed_pgdata_prod docker-compose -f docker-compose.yml -f docker-
compose.dev.yml up
```

NOTE: you'll need to run `docker-compose down` to remove the containers before you can restart the containers connecting to different volumes.

Running Tests

While the containers are running (ie after running the docker-compose up command), use `docker exec` to run tests in the web container:

```
docker exec -it seed_web ./manage.py test --settings config.settings.docker_dev
```

Add the setting `--nocapture` in order to see `stdout` while running tests. You will need to do this in order to make use of debugging as described below or the output to your debug commands will not display until after the break point has passed and the tests are finished.

Also worth noting: output from logging (`_log.debug`, etc) will not display in any situation unless a test fails.

Debugging

To use `pdb` on the server, the web container has `remote-pdb` installed. In your code, insert the following

```
import remote_pdb; remote_pdb.set_trace()
```

Once the breakpoint is triggered, you should see the web container log something like “RemotePdb session open at 127.0.0.1:41653, waiting for connection ...”. To connect to the remote session, run `netcat` from inside the container (using the appropriate port).

```
docker exec -it seed_web nc 127.0.0.1:41653
```


DEPLOYMENT GUIDE

SEED is intended to be installed on Linux instances in the cloud (e.g. AWS), and on local hardware. SEED Platform does not officially support Windows for production deployment. If this is desired, see the Django [notes](#).

2.1 AWS Setup

Amazon Web Services ([AWS](#)) provides the preferred hosting for the SEED Platform.

seed is a [Django Project](#) and Django's documentation is an excellent place for general understanding of this project's layout.

2.1.1 Prerequisites

Ubuntu server 18.04 LTS

Note: These instructions have not been updated for Ubuntu 18.04. It is recommended to use Docker-based deployments.

```
sudo apt-get update
sudo apt-get upgrade
sudo apt-get install -y libpq-dev python-dev python-pip libatlas-base-dev \
gfortran build-essential g++ npm libxml2-dev libxslt1-dev git mercurial \
libssl-dev libffi-dev curl uwsgi-core uwsgi-plugin-python
```

PostgreSQL and Redis are not included in the above commands. For a quick installation on AWS it is okay to install PostgreSQL and Redis locally on the AWS instance. If a more permanent and scalable solution, it is recommended to use AWS's hosted Redis (ElastiCache) and PostgreSQL service.

Note: postgresql >=9.4 is required to support [JSON Type](#)

```
# To install PostgreSQL and Redis locally
sudo apt-get install redis-server
sudo apt-get install postgresql postgresql-contrib
```

Amazon Web Services (AWS) Dependencies

The following AWS services can be used for **SEED** but are not required:

- RDS (PostgreSQL >=9.4)
- ElastiCache (redis)
- SES

2.1.2 Python Dependencies

Clone the **SEED** repository from **github**

```
$ git clone git@github.com:SEED-platform/seed.git
```

enter the repo and install the python dependencies from [requirements](#)

```
$ cd seed
$ sudo pip install -r requirements/aws.txt
```

2.1.3 JavaScript Dependencies

npm is required to install the JS dependencies.

```
$ sudo apt-get install build-essential
$ sudo apt-get install curl
```

```
$ npm install
```

2.1.4 Database Configuration

Copy the `local_untracked.py.dist` file in the `config/settings` directory to `config/settings/local_untracked.py`, and add a `DATABASES` configuration with your database username, password, host, and port. Your database configuration can point to an AWS RDS instance or a PostgreSQL 9.4 database instance you have manually installed within your infrastructure.

```
# Database
DATABASES = {
    'default': {
        'ENGINE': 'django.db.backends.postgresql_psycopg2',
        'NAME': 'seed',
        'USER': '',
        'PASSWORD': '',
        'HOST': '',
        'PORT': '',
    }
}
```

Note: In the above database configuration, `seed` is the database name, this is arbitrary and any valid name can be used as long as the database exists.

create the database within the postgres `psql` shell:

```
CREATE DATABASE seed;
```

or from the command line:

```
createdb seed
```

create the database tables and migrations:

```
python manage.py syncdb
python manage.py migrate
```

create a superuser to access the system

```
$ python manage.py create_default_user --username=demo@example.com --
  ↳organization=example --password=demo123
```

Note: Every user must be tied to an organization, visit `/app/#/profile/admin` as the superuser to create parent organizations and add users to them.

2.1.5 Cache and Message Broker

The SEED project relies on [redis](#) for both cache and message brokering, and is available as an AWS [ElastiCache](#) service. `local_untracked.py` should be updated with the `CACHES` and `CELERY_BROKER_URL` settings.

```
CACHES = {
    'default': {
        'BACKEND': 'redis_cache.cache.RedisCache',
        'LOCATION': "seed-core-cache.ntmprk.0001.usw2.cache.amazonaws.com:6379",
        'OPTIONS': { 'DB': 1 },
        'TIMEOUT': 300
    }
}
CELERY_BROKER_URL = 'redis://seed-core-cache.ntmprk.0001.usw2.cache.amazonaws.
  ↳com:6379/1'
```

2.1.6 Running Celery the Background Task Worker

[Celery](#) is used for background tasks (saving data, matching, creating projects, etc) and must be connected to the message broker queue. From the project directory, `celery` can be started:

```
celery -A seed worker -l INFO -c 2 -B --events --maxtasksperchild 1000
```

2.2 General Linux Setup

While Amazon Web Services ([AWS](#)) provides the preferred hosting for SEED, running on a bare-bones Linux server follows a similar setup, replacing the AWS services with their Linux package counterparts, namely: PostgreSQL and Redis.

SEED is a [Django project](#) and Django's documentation is an excellent place to general understanding of this project's layout.

2.2.1 Prerequisites

Ubuntu server/desktop 16.04 or newer (18.04 recommended)

Install the following base packages to run SEED:

```
sudo add-apt-repository ppa:timescale/timescaledb-ppa
sudo apt update
sudo apt upgrade
sudo apt install libpq-dev python3-dev python3-pip libatlas-base-dev \
gfortran build-essential nodejs npm libxml2-dev libxslt1-dev git \
libssl-dev libffi-dev curl uwsgi-core uwsgi-plugin-python mercurial
sudo apt install gdal-bin postgis
sudo apt install redis-server
sudo apt install timescaledb-postgresql-10 postgresql-contrib

# For running selenium/protractor
sudo apt install default-jre
```

Note: postgresql >=9.3 is required to support [JSON Type](#)

2.2.2 Configure PostgreSQL

Replace 'seeddb', 'seeduser' with desired db/user. By default use password *seedpass* when prompted

```
$ sudo timescaledb-tune
$ sudo service postgresql restart
$ sudo su - postgres
$ createuser -P "seeduser"
$ createdb "seeddb" --owner="seeduser"
$ psql
postgres=# GRANT ALL PRIVILEGES ON DATABASE "seeddb" TO "seeduser";
postgres=# ALTER USER "seeduser" CREATEDB CREATEROLE SUPERUSER;
postgres=# \q
$ exit
```

2.2.3 Python Dependencies

clone the **seed** repository from **github**

```
$ git clone git@github.com:SEED-platform/seed.git
```

enter the repo and install the python dependencies from [requirements](#)

```
$ cd seed
$ pip3 install -r requirements/local.txt
```

2.2.4 JavaScript Dependencies

```
$ npm install
```

2.2.5 Django Database Configuration

Copy the `local_untracked.py.dist` file in the `config/settings` directory to `config/settings/local_untracked.py`, and add a `DATABASES` configuration with your database username, password, host, and port. Your database configuration can point to an AWS RDS instance or a PostgreSQL 9.4 database instance you have manually installed within your infrastructure.

```
# Database
DATABASES = {
    'default': {
        'ENGINE': 'django.contrib.gis.db.backends.postgis',
        'NAME': 'seeddb',
        'USER': 'seeduser',
        'PASSWORD': '<PASSWORD>',
        'HOST': 'localhost',
        'PORT': '5432',
    }
}
```

Note: Other databases could be used such as MySQL, but are not supported due to the postgres-specific [JSON Type](#)

In in the above database configuration, `seed` is the database name, this is arbitrary and any valid name can be used as long as the database exists. Enter the database name, user, password you set above.

The database settings can be tested using the Django management command, `python3 manage.py dbshell` to connect to the configured database.

create the database tables and migrations:

```
$ python3 manage.py migrate
```

2.2.6 Cache and Message Broker

The SEED project relies on [redis](#) for both cache and message brokering, and is available as an AWS [ElastiCache](#) service or with the `redis-server` Linux package. (`sudo apt install redis-server`)

`local_untracked.py` should be updated with the `CACHES` and `CELERY_BROKER_URL` settings.

```
CACHES = {
    'default': {
        'BACKEND': 'redis_cache.cache.RedisCache',
        'LOCATION': '127.0.0.1:6379',
        'OPTIONS': {'DB': 1},
        'TIMEOUT': 300
    }
}
CELERY_BROKER_URL = 'redis://127.0.0.1:6379/1'
```

2.2.7 Creating the initial user

create a superuser to access the system

```
$ python3 manage.py create_default_user --username=admin@my.org --organization=lbnl --
↪password=badpass
```

Note: Of course, you need to save this user/password somewhere, since this is what you will use to login to the SEED website.

Every user must be tied to an organization, visit `/app/#/profile/admin` as the superuser to create parent organizations and add users to them.

2.2.8 Running celery the background task worker

[Celery](#) is used for background tasks (saving data, matching, creating projects, etc) and must be connected to the message broker queue. From the project directory, `celery` can be started:

```
DJANGO_SETTINGS_MODULE=config.settings.dev celery -A seed worker -l info -c 2 -B --
↪events --maxtasksperchild=1000
```

2.2.9 Running the development web server

The Django dev server (not for production use) can be a quick and easy way to get an instance up and running. The dev server runs by default on port 8000 and can be run on any port. See Django's [runserver documentation](#) for more options.

```
$ python3 manage.py runserver --settings=config.settings.dev
```

2.2.10 Running a production web server

Our recommended web server is uwsgi sitting behind nginx. The python package uwsgi is needed for this, and should install to `/usr/local/bin/uwsgi`. We recommend using `django-static` to load static files.

Note: The use of the dev settings file is production ready, and should be used for non-AWS installs with `DEBUG` set to `False` for production use.

```
$ pip3 install uwsgi django-static
```

Generate static files:

```
$ python3 manage.py collectstatic --settings=config.settings.prod -i package.json -i
↪npm-shrinkwrap.json -i node_modules/openlayers-ext/index.html
```

Update `config/settings/local_untracked.py`:

```
DEBUG = False
# static files
STATIC_ROOT = 'collected_static'
STATIC_URL = '/static/'
```

Start the web server (this also starts celery):

```
$ ./bin/start-seed
```

Warning: Note that uwsgi has port set to 80. In a production setting, a dedicated web server such as NGINX would be receiving requests on port 80 and passing requests to uwsgi running on a different port, e.g 8000.

2.2.11 Environment Variables

The following environment variables can be set within the `~/ .bashrc` file to override default Django settings.

```
export SENTRY_DSN=https://xyz@app.getsentry.com/123
export DEBUG=False
export ONLY_HTTPS=True
```

2.2.12 Mail Services

AWS SES Service

In the AWS setup, we can use SES to provide an email service for Django. The service is configured in the `config/settings/local_untracked.py`:

```
EMAIL_BACKEND = 'django_ses.SESBackend'
```

In general, the following steps are needed to configure SES:

1. Access Amazon SES Console - [Quickstart](#)
2. Login to Amazon SES Console. Verify which region we are using (e.g., us-east-1)

3. Decide on email address that will be sending the emails and add them to the [SES Verified Emails](#).
4. Test that SES works as expected (while in the SES sandbox). Note that you will need to add the sender and recipient emails to the verified emails while in the sandbox.
5. Update the `local_untracked.py` file or set the environment variables for the docker file.
6. Once ready, move the SES instance out of the sandbox. Following instructions [here](#)
7. (Optional) Set up Amazon Simple Notification Service (Amazon SNS) to notify you of bounced emails and other issues.
8. (Optional) Use the AWS Management Console to set up Easy DKIM, which is a way to authenticate your emails. Amazon SES console will have the values for SPF and DKIM that you need to put into your DNS.

SMTP service

Many options for setting up your own [SMTP](#) service/server or using other SMTP third party services are available and compatible including [gmail](#). SMTP is not configured for working within Docker at the moment.

```
EMAIL_BACKEND = 'django.core.mail.backends.smtp.EmailBackend'
```

2.2.13 local_untracked.py

```
# PostgreSQL DB config
DATABASES = {
    'default': {
        'ENGINE': 'django.db.backends.postgresql_psycopg2',
        'NAME': 'seed',
        'USER': 'your-username',
        'PASSWORD': 'your-password',
        'HOST': 'your-host',
        'PORT': 'your-port',
    }
}

# config for local storage backend
DOMAIN_URLCONFS = {'default': 'config.urls'}

CACHES = {
    'default': {
        'BACKEND': 'redis_cache.cache.RedisCache',
        'LOCATION': '127.0.0.1:6379',
        'OPTIONS': {'DB': 1},
        'TIMEOUT': 300
    }
}

CELERY_BROKER_URL = 'redis://127.0.0.1:6379/1'

# SMTP config
EMAIL_BACKEND = 'django.core.mail.backends.smtp.EmailBackend'

# static files
STATIC_ROOT = 'collected_static'
STATIC_URL = '/static/'
```


2.3 Docker Deployment on AWS

Amazon Web Services ([AWS](#)) provides the preferred hosting for the SEED Platform.

seed is a [Django Project](#) and Django's documentation is an excellent place for general understanding of this project's layout.

2.3.1 Installation

Ubuntu server 18.04 or newer with a m5ad.xlarge (if using in Production instance)

- After launching the instance, run the following commands to install docker.

```
# Install any upgrades
sudo apt-get update
sudo apt-get upgrade -y

# Remove any old docker engines
sudo apt-get remove docker docker-engine docker.io containerd runc

# Install docker community edition
sudo apt-get update
sudo apt-get install -y apt-transport-https ca-certificates curl gnupg-agent software-
↳ properties-common
curl -fsSL https://download.docker.com/linux/ubuntu/gpg | sudo apt-key add -
sudo add-apt-repository \
    "deb [arch=amd64] https://download.docker.com/linux/ubuntu \
    $(lsb_release -cs) \
    stable"

sudo apt-get update
sudo apt-get install -y docker-ce docker-ce-cli containerd.io
# Add your user to the docker group
sudo groupadd docker
sudo usermod -aG docker $USER
newgrp docker
```

Note: It is okay if the first command fails

- Verify that the DNS is working correctly. Run the following and verify the response lists IPs (v6 most likely)

```
# verify that the dns resolves
docker run --rm seedplatform/seed getent hosts seed-platform.org
# or
docker run --rm tutum/dnsutils nslookup email.us-west-2.amazonaws.com
```

- Install Docker compose

```
sudo curl -L "https://github.com/docker/compose/releases/download/1.25.4/docker-
↳ compose-$(uname -s)-$(uname -m)" -o /usr/local/bin/docker-compose
sudo chmod +x /usr/local/bin/docker-compose
```

- Checkout SEED (or install from the releases).

```
git clone
```

- Add in the Server setting into profile.d. For example add the content below (appropriately filled out) into `/etc/profile.d/seed.sh`

```
export POSTGRES_USER=seed
export POSTGRES_DB=seed
export POSTGRES_PASSWORD=GDEus3fasdlaskj89QkAldjfx
export POSTGRES_PORT=5432
export SECRET_KEY="96=7jg%_&1-z9c9qwwu2@w$hb3r322yf3lz@*ekw-1@ly-%+^"

# The admin user is only valid only until the database is restored
export SEED_ADMIN_USER=user@seed-platform.org
export SEED_ADMIN_PASSWORD="7FeBWal38*&k3jlfa92lakj8ih4"
export SEED_ADMIN_ORG=default

# For SES
export AWS_ACCESS_KEY_ID=<AWS_ACCESS_KEY>
export AWS_SECRET_ACCESS_KEY=<AWS_SECRET_KEY>
export AWS_SES_REGION_NAME=us-west-2
export AWS_SES_REGION_ENDPOINT=email.us-west-2.amazonaws.com
export SERVER_EMAIL=user@seed-platform.org
```

- Before launching the first time, make sure the persistent volumes and the backup directory exist.

```
docker volume create --name=seed_pgdata
docker volume create --name=seed_media

mkdir -p $HOME/seed-backups
```

Note: Make sure to have the seed-backups in your path, otherwise the db-postgres container will not launch.

- Launch the project

```
cd <checkout dir>
./deploy.sh
```

2.3.2 Deploying with OEP

The preferred way to deploy with Docker is using docker swarm and docker stack. Look at the [deploy.sh script](#) for implementation details.

The short version is to simply run the command below. Note that the passing of the docker-compose.yml filename is not required if using docker-compose.local.yml.

```
`bash ./deploy.sh docker-compose.local.yml `
```

If deploying using a custom docker-compose yml file, then simply replace the name in the command above. This would be required if using the Open Efficiency Platform work (connecting SEED to Salesforce).

2.4 Kubernetes Deployment Guide with Helm

Kubernetes is a robust container orchestration system for easy application deployment and management. Helm takes that a step further with by packaging up required helm “charts” into one deployment command.

2.4.1 Setup

Cluster

In order to deploy the SEED platform on a Kubernetes you will need “cluster” which will be configured by your cloud service of choice. Each installation will be slightly different depending on the service. Bellow are links to quick-start guides for provisioning a cluster and connecting.

- Amazon Web Services ([AWS](#))
- Google Cloud Platform ([GCP](#))
- Azure ([AKS](#))

Kubectl

Kubectl is the main function in which you will be interfacing with your deployed application on your cluster. This CLI is what connects you to your cluster that you have just provisioned. If your cloud service did not have you configure kubectl in your cluster setup, you can download it [here](#). Once kubectl is installed and configured to your cluster you can run some simple commands to ensure its working properly:

```
#View the cluster
kubectl cluster-info

#View pods, services and replicaset (will be empty until deploying an app)
kubectl get all
```

All of the common kubectl commands can be found in these [docs](#)

Note: For those unfamiliar with CLIs, there are a number of GUI applications that are able to deploy on your stack with ease. One of which is Kubernetes native application called [Dashboard UI](#)

Helm

Helm organizes all of your Kubernetes deployment, service, and volume yml files into “charts” that can be deployed, managed, and published with simple commands. To install Helm:

- [Windows](#)
- Mac (with Homebrew) `brew install helm`

Charts

SEED stores its charts in the `charts` directory of the Github Repo. There are two main charts that are deployed when starting SEED on Kubernetes.

- `persistentvolumes` - these are the volumes to store SEED media data and SEED Postgres data
- `seed` - this stores all of the other deployment and service files for the application

Unlike `persistentvolumes`, the `seed` charts must be modified with user environment variables that will be forwarded to the docker container for deployment. Before deployment, the user **MUST** set these variables to their desired values.

web-deployment.yaml

This chart contains the deployment specification for the SEED web container. Replace all the values in `</>`.

```
# Environment variables for the web container
- env:
  # AWS Email service variables to send emails to new users - can be removed if not
  ↪using this functionality.
  - name: AWS_ACCESS_KEY_ID
    value: <access_key_id>
  - name: AWS_SECRET_ACCESS_KEY
    value: <secret_access_key>
  - name: AWS_SES_REGION_NAME
    value: us-west-2
  - name: AWS_SES_REGION_ENDPOINT
    value: email.us-west-2.amazonaws.com
  - name: SERVER_EMAIL
    value: info@seed-platform.org
  # Django Variables
  - name: DJANGO_SETTINGS_MODULE
    value: config.settings.docker
  - name: SECRET_KEY
    value: <replace-secret-key>
  - name: SEED_ADMIN_ORG
    value: default
  - name: SEED_ADMIN_PASSWORD
    value: <super-secret-password>
  - name: SEED_ADMIN_USER
    value: <user@seed-platform.org>
  # Postgres variables
  - name: POSTGRES_DB
    value: seed
  - name: POSTGRES_PASSWORD
    value: <super-secret-password> # must match db-postgres-deployment.yaml and web-
  ↪celery-deployment.yaml
  - name: POSTGRES_PORT
    value: "5432"
  - name: POSTGRES_USER
    value: seeduser
  # Bsyncr analysis variables
  - name: BSYNCR_SERVER_PORT
    value: "5000"
  - name: BSYNCR_SERVER_HOST
    value: bsyncr
  # Sentry monitoring - remove if not applicable
```

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```

- name: SENTRY_JS_DSN
  value: <enter-dsn>
- name: SENTRY_RAVEN_DSN
  value: <enter-dsn>
# Google self registration security - remove if not applicable
- name: GOOGLE_RECAPTCHA_SECRET_KEY
  value: <reCAPTCHA-key>
# Toggles the v2 version of the SEED API
- name: INCLUDE_SEED_V2_APIS
  value: TRUE
image: seedplatform/seed:<insert deployment image version>
#versions can be found here https://github.com/SEED-platform/seed/releases/tag/v2.9.3

```

web-celery-deployment.yaml

This chart contains the deployment specification for the Celery container to connect to Postgres. Replace the Postgres password to match web-deployment.

```

- name: POSTGRES_PASSWORD
  value: <super-secret-password> # must match db-postgres-deployment.yaml and web-
    ↪ celery-deployment.yaml

```

bsyncr-deployment.yaml

This chart contains the deployment specification for the bsyncr analysis server. Request a NOAA token from [this website](#).

```

- name: NOAA_TOKEN
  value: <token>

```

Deployment

Once you are connected to your cluster and have your settings configured with the environment variables of your choice in the charts, you are ready to deploy the app. This will be done using helm commands in the root of the charts directory.

- `helm install --generate-name persistentvolumes`
- `helm install --generate-name seed`

You will be able to see SEED coming online with statuses like container creating, and running with:

- `kubectl get all`

Once all of the pods are running you will be able to hit the external ingress through the URL listed in the web service information. It should look something like `service/web LoadBalancer 10.100.154.227 <my-unique-url> 80:32291/TCP`

Logging In

After a successful deployment in order to login you will need to create yourself as a user in the web container. To do this, we will exec into the container and run some Django commands. `* kubectl get pods * kubectl exec -it pod/<my-pods-id> bash`

Now that we are in the container, we can make a user. .. code-block:: bash

```
./manage.py create_default_user --username=admin@my.org --organization=seedorg --password=badpass
```

You can now use these credentials to log in to the SEED website.

2.5 Migrations

Migrations are handles through Django; however, various versions have customs actions for the migrations. See the migrations page for more information.

2.6 Monitoring

2.6.1 Sentry

Sentry can monitor your webservers for any issues. To enable sentry add the following to your `local_untracked.py` files after setting up your Sentry account on sentry.io.

The `RAVEN_CONFIG` is used for the backend and the `SENTRY_JS_DSN` is used for the frontend. At the moment, it is recommended to setup two sentry projects, one for backend and one for frontend.

```
import raven

RAVEN_CONFIG = {
    'dsn': 'https://<user>:<key>@sentry.io/<job_id>',
    # If you are using git, you can also automatically configure the
    # release based on the git info.
    'release': raven.fetch_git_sha(os.path.abspath(os.curdir)),
}

SENTRY_JS_DSN = 'https://<key>@sentry.io/<job_id>'
```

3.1 Authentication

Authentication is handled via an encoded authorization token set in a HTTP header. To request an API token, go to `/app/#/profile/developer` and click ‘Get a New API Key’.

Authenticate every API request with your username (email, all lowercase) and the API key via **Basic Auth**. The header is sent in the form of `Authorization: Basic <credentials>`, where credentials is the base64 encoding of the email and key joined by a single colon `:`.

Using Python, use the requests library:

```
import requests

result = requests.get('https://seed-platform.org/api/version/', auth=(user_email, api_
↪key))
print result.json()
```

Using curl, pass the username and API key as follows:

```
curl -u user_email:api_key http://seed-platform.org/api/version/
```

If authentication fails, the response’s status code will be 302, redirecting the user to `/app/login`.

3.2 Payloads

Many requests require a JSON-encoded payload and parameters in the query string of the url. A frequent requirement is including the `organization_id` of the org you belong to. For example:

```
curl -u user_email:api_key https://seed-platform.org/api/v2/organizations/12/
```

Or in a JSON payload:

```
curl -u user_email:api_key \
  -d '{"organization_id":6, "role": "viewer"}' \
  https://seed-platform.org/api/v2/users/12/update_role/
```

Using Python:

```
params = {'organization_id': 6, 'role': 'viewer'}
result = requests.post('https://seed-platform.org/api/v2/users/12/update_role/',
                      data=json.dumps(params),
```

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```
print result.json()          auth=(user_email, api_key))
```

3.3 Responses

Responses from all requests will be JSON-encoded objects, as specified in each endpoint's documentation. In the case of an error, most endpoints will return this instead of the expected payload (or an HTTP status code):

```
{
  "status": "error",
  "message": "explanation of the error here"
}
```

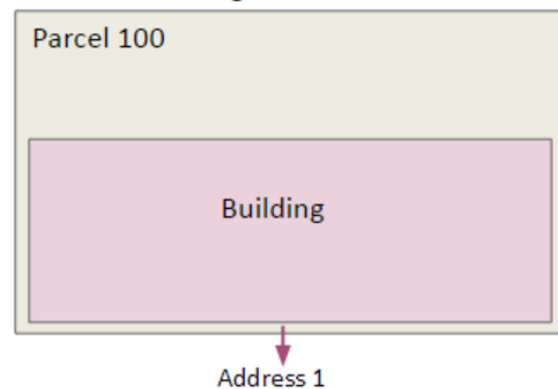
3.4 API Endpoints

A list of interactive endpoints are available by accessing the API menu item on the left navigation pane within your account on your SEED instance.

To view a list of non-interactive endpoints without an account, view [swagger](#) on the development server.

DATA MODEL

Case A: 1 Building to 1 Parcel

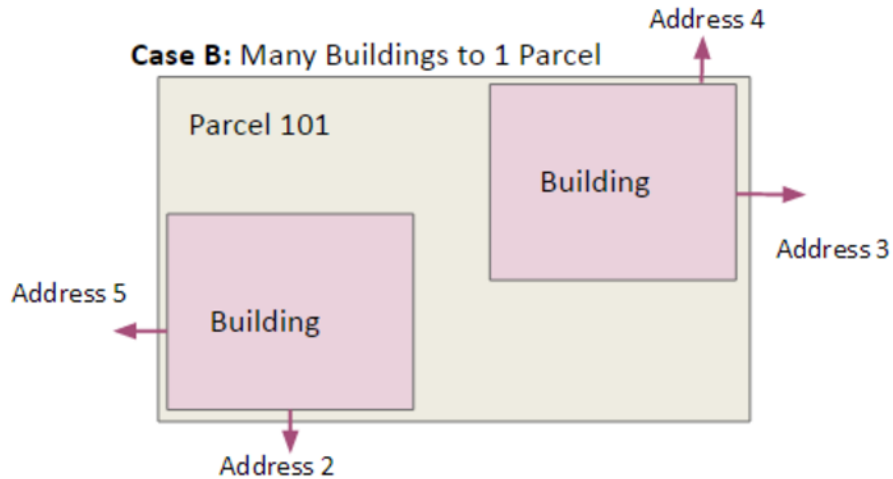


Source Data

Tax Assessor Data		
One Tax Lot ID per record		
Tax Lot ID	Address	District
100	44 West 1st	Willow

Building Data	
Building ID	Tax Lot ID
30	100

Portfolio Manager Data					
One PM record associated with one Tax Lot ID or Building ID					
PM ID	Building ID	Tax Lot ID	Energy Score	EUI	Year Ending
1	30	100	76	15,000	12/31/2015

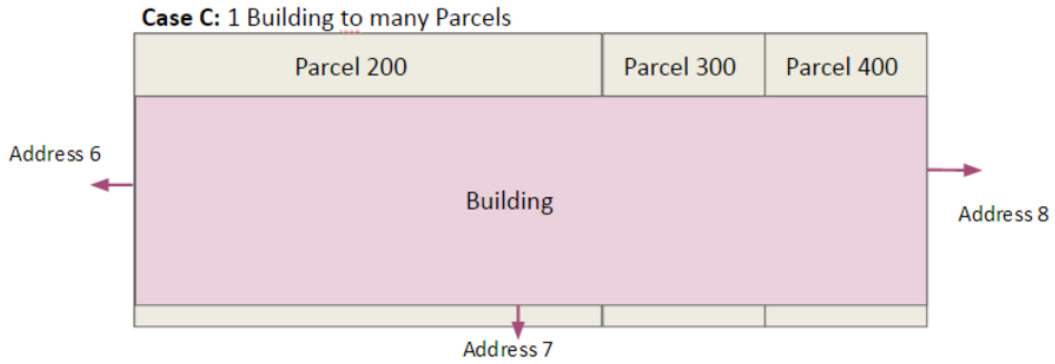


Source Data

Tax Assessor Data		
One Tax Lot ID per record		
Tax Lot ID	Address	District
101	15 Broadway	Willow

Building Data	
Building ID	Tax Lot ID
101-A	101
101-B	101

Portfolio Manager Data					
Multiple PM records associated with one Tax Lot ID or Building ID					
PM ID	Building ID	Tax Lot ID	Energy Score	EUI	Year Ending
2	101-A	101	66	12,000	12/31/2015
3	101-B	101	98	2,500	12/31/2015

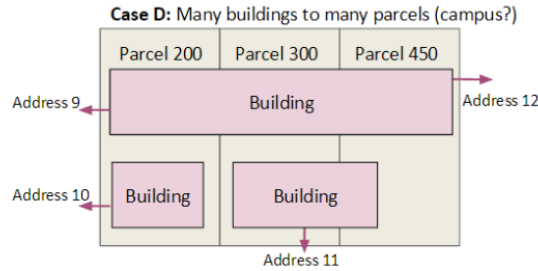


Source Data

Tax Assessor Data One Tax Lot ID per record		
Tax Lot ID	Address	District
200	1 Adams	Willow
300	2 West	Willow
400	3 Exeter	Willow

Building Data	
Building ID	Tax Lot ID
44	200;300;400

Portfolio Manager Data One PM record or Building ID associated with Multiple Tax Lot IDs					
PM ID	Building ID	Tax Lot ID	Energy Score	EUI	Year Ending
4	44	200;300;400	82	161,000	12/31/2015

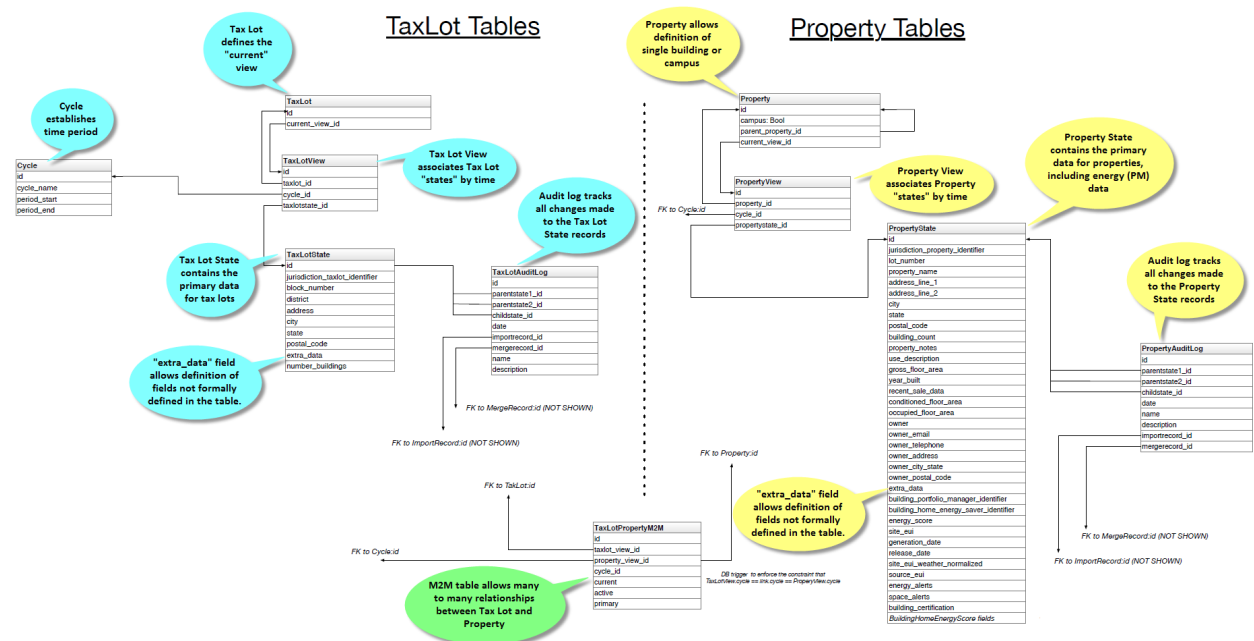


Source Data

Tax Assessor Data One Tax Lot ID per record		
Tax Lot ID	Address	District
200	1 Adams	Willow
300	2 West	Willow
400	3 Exeter	Willow

Building Data	
Building ID	Tax Lot ID
L1	200;300;400
L2	200
L3	300;450

Portfolio Manager Data Hierarchical campus to building: One PM record for campus and multiple PM records for campus buildings related many to many to Tax Lots							
PM ID	Property Name	Parent Name	Parent PM ID	Tax Lot ID	Energy Score	EUI	Year Ending
5	Lucky Campus	Lucky Campus	5	200;300;450	--	--	12/31/2013
6	Building 1	Lucky Campus	5	200;300;450	59	107	12/31/2013
7	Building 2	Lucky Campus	5	200	62	268	12/31/2013
8	Building 3	Lucky Campus	5	300;450	74	961	12/31/2013



Todo: Documentation below is out of state and needs updated.

Our primary data model is based on a tree structure with BuildingSnapshot instances as nodes of the tree and the tip of the tree referenced by a CanonicalBuilding.

Take the following example: a user has loaded a CSV file containing information about one building and created the first BuildingSnapshot (BS0). At this point in time, BS0 is linked to the first CanonicalBuilding (CB0), and CB0 is also linked to BS0.

```
BS0 <-- CB0
BS0 --> CB0
```

These relations are represented in the database as foreign keys from the BuildingSnapshot table to the CanonicalBuilding table, and from the CanonicalBuilding table to the BuildingSnapshot table.

The tree structure comes to fruition when a building, BS0 in our case, is matched with a new building, say BS1, enters the system and is auto-matched.

Here BS1 entered the system and was matched with BS0. When a match occurs, a new BuildingSnapshot is created, BS2, with the fields from the existing BuildingSnapshot, BS0, and the new BuildingSnapshot, BS1, merged together. If both the existing and new BuildingSnapshot have data for a given field, the new record's fields are preferred and merged into the child, BS2.

The fields from new snapshot are preferred because that is the newer of the two records from the perspective of the system. By preferring the most recent fields this allows for evolving building snapshots over time. For example, if an existing canonical record has a Site EUI value of 75 and some changes happen to a building that cause this to change to 80 the user can submit a new record with that change.

All BuildingSnapshot instances point to a CanonicalBuilding.

```
BS0  BS1
  \  /
   BS2 <-- CB0

BS0 --> CB0
BS1 --> CB0
BS2 --> CB0
```

4.1 parents and children

BuildingSnapshots also have linkage to other BuildingSnapshots in order to keep track of their *parents* and *children*. This is represented in the Django model as a many-to-many relation from BuildingSnapshot to BuildingSnapshot. It is represented in the PostgreSQL database as an additional seed_buildingsnapshot_children table.

In our case here, BS0 and BS1 would both have *children* BS2, and BS2 would have *parents* BS0 and BS1.

Note: throughout most of the application, the `search_buildings` endpoint is used to search or list active building. This is to say, buildings that are pointed to by an active CanonicalBuilding. The `search_mapping_results` endpoint allows the search of buildings regardless of whether the BuildingSnapshot is pointed to by an active CanonicalBuilding or not and this search is needed during the mapping preview and matching sections of the application.

For illustration purposes let's suppose BS2 and a new building BS3 match to form a child BS4.

parent	child
BS0	BS2
BS1	BS2
BS2	BS4
BS3	BS4

And the corresponding tree would look like:

```

BS0  BS1
 \  /
  BS2 BS3
   \  /
    BS4 <-- CB0

BS0 --> CB0
BS1 --> CB0
BS2 --> CB0
BS3 --> CB0
BS4 --> CB0

```

4.1.1 matching

During the auto-matching process, if a *raw* BuildingSnapshot matches an existing BuildingSnapshot instance, then it will point to the existing BuildingSnapshot instance's CanonicalBuilding. In the case where there is no existing BuildingSnapshot to match, a new CanonicalBuilding will be created, as happened to B0 and C0 above.

field	BS0	BS1	BS2 (child)
id1	11	11	11
id2		12	12
id3	13		13
id4	14	15	15

4.2 manual-matching vs auto-matching

Since BuildingSnapshots can be manually matched, there is the possibility for two BuildingSnapshots each with an active CanonicalBuilding to match and the system has to choose to move only one CanonicalBuilding to the tip of the tree for the primary BuildingSnapshot and *deactivate* the secondary BuildingSnapshot's CanonicalBuilding.

Take for example:

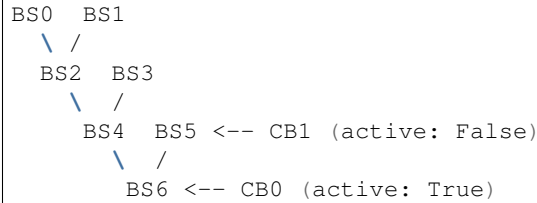
```

BS0  BS1
 \  /
  BS2 BS3
   \  /
    BS4 <-- CB0 (active: True)      BS5 <-- CB1 (active: True)

```

If a user decides to manually match BS4 and BS5, the system will take the primary BuildingSnapshot's CanonicalBuilding and have it point to their child and deactivate CB1. The deactivation is handled by setting a field on the CanonicalBuilding instance, *active*, from *True* to *False*.

Here is what the tree would look like after the manual match of **BS4** and **BS5**:



Even though BS5 is pointed to by a CanonicalBuilding, CB1, BS5 will not be returned by the normal `search_buildings` endpoint because the CanonicalBuilding pointing to it has its field `active` set to `False`.

Note: anytime a match is **unmatched** the system will create a new CanonicalBuilding or set an existing CanonicalBuilding's `active` field to `True` for any leaf BuildingSnapshot trees.

4.3 what really happens to the BuildingSnapshot table on import (and when)

The above is conceptually what happens but sometimes the devil is in the details. Here is what happens to the BuildingSnapshot table in the database when records are imported.

Every time a record is added at least two BuildingSnapshot records are created.

Consider the following simple record:

Property Id	Year Ending	Property Floor Area	Address 1	Release Date
499045	2000	1234	1 fake st	12/12/2000

The first thing the user is upload the file. When the user sees the “Successful Upload!” dialog one record has been added to the BuildingSnapshot table.

This new record has an id (73700 in this case) and a created and modified timestamp. Then there are a lot of empty fields and a `source_type` of 0. Then there is the `extra_data` column which contains the contents of the record in key-value form:

Address 1 “1 fake st”

Property Id “499045”

Year Ending “2000”

Release Date “12/12/2000”

Property Floor Area “1234”

And a corresponding `extra_data_sources` that looks like

Address 1 73700

Property Id 73700

Year Ending 73700

Release Date 73700

Property Floor Area 73700

All of the fields that look like `_source_id` are also populated with 73700 E.G. `owner_postal_code_source_id`.

The other fields of interest are the `organization` field which is populated with the user's default organization and the `import_file_id` field which is populated with a reference to a `data_importer_importfile` record.

At this point the record has been created before the user hits the "Continue to data mapping" button.

The second record (id = 73701) is created by the time the user gets to the screen with the "Save Mappings" button. This second record has the following fields populated:

- `id`
- `created`
- `modified`
- `pm_property_id`
- `year_ending`
- `gross_floor_area`
- `address_line_1`
- `release_date`
- `source_type` (this is 2 instead of 0 as with the other record)
- `import_file_id`
- `organization_id`.

That is all. All other fields are empty. In this case that is all that happens.

Now consider the same user uploading a new file from the next year that looks like

Property Id	Year Ending	Property Floor Area	Address 1	Release Date
499045	2000	1234	1 fake st	12/12/2001

As before one new record is created on upload. This has id 73702 and follows the same pattern as 73700. And similarly 73703 is created like 73701 before the "Save Mappings" button appears.

However this time the system was able to make a match with an existing record. After the user clicks the "Confirm mappings & start matching" button a new record is created with ID 73704.

73704 is identical to 73703 (in terms of contents of the `BuildingSnapshot` table only) with the following exceptions:

- `created` and `modified` timestamps are different
- `match_type` is populated and has a value of 1
- `confidence` is populated and has a value of .9
- `source_type` is 4 instead of 2
- `canonical_building_id` is populated with a value
- `import_file_id` is NULL
- `last_modified_by_id` is populated with value 2 (This is a key into the `landing_seeduser` table)
- `address_line_1_source_id` is 73701
- `gross_floor_area_source_id` is populated with value 73701
- `pm_property_id_source_id` is populated with 73701
- `release_date_source_id` is populated with 73701

- year_ending_source_id is populated with 73701

4.4 what really happens to the CanonicalBuilding table on import (and when)

In addition to the BuildingSnapshot table the CanonicalBuilding table is also updated during the import process. To summarize the above 5 records were created in the BuildingSnapshot table:

1. 73700 is created from the raw 2000 data
2. 73701 is the mapped 2000 data,
3. 73702 is created from the raw 2001 data
4. 73703 is the mapped 2001 data
5. 73704 is the result of merging the 2000 and 2001 data.

In this process CanonicalBuilding is updated twice. First when the 2000 record is imported the CanonicalBuilding gets populated with one new row at the end of the matching step. I.E. when the user sees the “Load More Data” screen. At this point there is a new row that looks like

id	active	canonical_building_id
20505	TRUE	73701

At this point there is one new canonical building and that is the BuildingSnapshot with id 73701. Next the user uploads the 2001 data. When the “Matching Results” screen appears the CanonicalBuilding table has been updated. Now it looks like

id	active	canonical_building_id
20505	TRUE	73704

There is still only one canonical building but now it is the BuildingSnapshot record that is the result of merging the 2000 and 2001 data: id = 73704.

4.5 organization

BuildingSnapshots belong to an Organization field that is a foreign key into the organization model (orgs_organization in Postgres).

Many endpoints filter the buildings based on the organizations the requesting user belongs to. E.G. get_buildings changes which fields are returned based on the requesting user’s membership in the BuildingSnapshot’s organization.

4.6 *_source_id fields

Any field in the BuildingSnapshot table that is populated with data from a submitted record will have a corresponding _source_id field. E.G pm_property_id has pm_property_id_source_id, address_line_1 has address_line_1_source_id, etc...

These are foreign keys into the BuildingSnapshot that is the source of that value. To extend the above table

field	BS0	BS1	BS2 (child)	BS2 (child) _source_id
id1	11		11	BS0
id2		12	12	BS1

NOTE: The BuildingSnapshot records made from the raw input file have all the _source_id fields populated with that record's ID. The non-canonical BuildingSnapshot records created from the mapped data have none set. The canonical BuildingSnapshot records that are the result of merging two records have only the _source_id fields set where the record itself has data. E.G. in the above address_line_1 is set to "1 fake st." so there is a value in the canonical BuildingSnapshot's address_line_1_source_id field. However there is no block number so block_number_source_id is empty. This is unlike the two raw BuildingSnapshot records who also have no block_number but nevertheless have a block_number_source_id populated.

4.7 extra_data

The BuildingSnapshot model has many "named" fields. Fields like "address_line_1", "year_built", and "pm_property_id". However the users are allowed to submit files with arbitrary fields. Some of those arbitrary fields can be mapped to "named" fields. E.G. "Street Address" can usually be mapped to "Address Line 1". For all the fields that cannot be mapped like that there is the extra_data field.

extra_data is Django json field that serves as key-value storage for other user-submitted fields. As with the other "named" fields there is a corresponding extra_data_sources field that serves the same role as the other _source_id fields. E.G. If a BuildingSnapshot has an extra_data field that looks like

an_unknown_field 1

something_else 2

It should have an extra_data_sources field that looks like

an_unknown_field some_BuildingSnapshot_id

something_else another_BuildingSnapshot_id

4.8 saving and possible data loss

When saving a Property file some fields that are truncated if too long. The following are truncated to 255 characters

- jurisdiction_tax_lot_id
- pm_property_id
- custom_id_1
- ubid
- lot_number
- block_number

- district
- owner
- owner_email
- owner_telephone
- owner_address
- owner_city_state
- owner_postal_code

And the following are truncated to 255:

- property_name
- address_line_1
- address_line_2
- city
- postal_code
- state_province
- building_certification

No truncation happens to any of the fields stored in extra_data.

DATA QUALITY

Data quality checks are run after the data are paired, during import of Properties/TaxLots, or on-demand by selecting rows in the inventory page and clicking the action button. This checks whether any default or user-defined Rules are broken or satisfied by Property/TaxLot records.

Notably, in most cases when data quality checks are run, Labels can be applied for any broken Rules that have a Label. To elaborate, Rules can have an attached Label. When a data quality check is run, records that break one of these “Labeled Rules” are then given that Label. The case where this Label attachment does not happen is during import due to performance reasons.

MAPPING

This document describes the set of calls that occur from the web client or API down to the back-end for the process of mapping data into SEED.

An overview of the process is:

1. Import - A file is uploaded to the server
2. Save - The file is batched saved into the database as JSON data
3. Mapping - Mapping occurs on that file
4. Matching / Merging
5. Pairing

6.1 Import

From the web UI, the import process invokes *seed.views.main.save_raw_data* to save the data. When the data is done uploading, we need to know whether it is a Portfolio Manager file, so we can add metadata to the record in the database. The end of the upload happens in *seed.data_importer.views.DataImportBackend.upload_complete*. At this point, the request object has additional attributes for Portfolio Manager files. These are saved in the model *seed.data_importer.models.ImportFile*.

6.2 Mapping

Once files are uploaded, file header columns need to be mapped to SEED columns. Mappings can be specified/decided manually for any particular file import, or mapping profiles can be created and subsequently applied to any file imports.

When a column mapping profile is applied to an import file, file header columns defined in the profile must match exactly (spaces, lowercase, uppercase, etc.) in order for the corresponding SEED column information to be used/mapped.

6.3 Matching

Todo: document

6.4 Pairing

Todo: document

MODULES

7.1 Configuration

7.1.1 Submodules

7.1.2 Template Context

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```
config.template_context.sentry_js(request)
```

```
config.template_context.session_key(request)
```

7.1.3 Tests

7.1.4 Utils

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```
config.utils.de_camel_case(name)
```

7.1.5 Views

7.1.6 WSGI

7.2 Data Package

7.2.1 Submodules

7.2.2 BEDES

7.2.3 Module contents

7.3 Data Importer Package

7.3.1 Submodules

7.3.2 Managers

7.3.3 Models

7.3.4 URLs

7.3.5 Utils

7.3.6 Views

7.3.7 Module contents

7.4 Features Package

7.4.1 Submodules

7.4.2 Module contents

7.5 Landing Package

7.5.1 Subpackages

`seed.landing.management` package

Subpackages

Landing Management Package

Submodules

Update EULA

Module contents

Module contents

7.5.2 Submodules

7.5.3 Forms

7.5.4 Models

7.5.5 Tests

7.5.6 URLs

7.5.7 Views

7.5.8 Module contents

7.6 Library Packages

7.6.1 Submodules

7.6.2 Module contents

7.7 Mapping Package

7.7.1 Submodules

7.7.2 seed.mappings.mapper module

7.7.3 seed.mappings.seed_mappings module

7.7.4 Module contents

7.8 Managers Package

7.8.1 Subpackages

Manager Tests Package

Submodules

Test JSON Manager

Module contents

7.8.2 Submodules

7.8.3 JSON

7.8.4 Module contents

7.9 Models

7.9.1 Submodules

7.9.2 AuditLog

7.9.3 Columns

7.9.4 Cycles

7.9.5 Joins

7.9.6 Generic Models

7.9.7 Projects

7.9.8 Properties

7.9.9 TaxLots

7.9.10 Module contents

7.10 Public Package

7.10.1 Submodules

7.10.2 Models

7.10.3 Module contents

7.11 SEED Package

7.11.1 Subpackages

Management Package

Subpackages

Module contents

Templatetags Package

Submodules

Breadcrumbs

Test Helpers Package

Subpackages

Test Helper Factor Package

Subpackages

Test Helper Factory Lib Package

Submodules

Chomsky

Submodules

Helpers

Module contents

Tests Package

Submodules

Admin Views

Decorators

Exporters

Models

Tasks

Views

Tests

Utils

7.11.2 Inheritance

7.11.3 Submodules

7.11.4 Decorators

7.11.5 Factory

7.11.6 Models

7.11.7 Search

7.11.8 Tasks

7.11.9 Token Generator

7.11.10 URLs

7.11.11 Utils

7.11.12 Views

7.11.13 Module contents

7.12 Serializers Package

7.12.1 Submodules

7.12.2 Serializers

7.12.3 Labels

7.12.4 Module contents

7.13 URLs Package

7.13.1 Submodules

7.13.2 Accounts

7.13.3 APIs

7.13.4 Main

7.13.5 Projects

7.14 Utilities Package

7.14.1 Submodules

7.14.2 APIs

DEVELOPER RESOURCES

8.1 General Notes

8.1.1 Flake Settings

Flake is used to statically verify code syntax. If the developer is running flake from the command line, they should ignore the following checks in order to emulate the same checks as the CI machine.

Code	Description
E402	module level import not at top of file
E501	line too long (82 characters) or max-line = 100
E731	do not assign a lambda expression, use a def
W503	line break occurred before a binary operator
W504	line break occurred after a binary operator

To run flake locally call:

```
tox -e flake8
```

8.2 Django Notes

8.2.1 Adding New Fields to Database

Adding new fields to SEED can be complicated since SEED has a mix of typed fields (database fields) and extra data fields. Follow the steps below to add new fields to the SEED database:

1. Add the field to the PropertyState or the TaxLotState model. Adding fields to the Property or TaxLot models is more complicated and not documented yet.
2. Add field to list in the following locations:
 - models/columns.py: Column.DATABASE_COLUMNS
 - TaxLotState.coparent or PropertyState.coparent: SQL query and keep_fields
1. Run *.manage.py makemigrations*
2. Add in a Python script in the new migration to add in the new column into every organizations list of columns. Note that the new_db_fields will be the same as the data in the Column.DATABASE_COLUMNS that were added.

```
def forwards(apps, schema_editor):
    Column = apps.get_model("seed", "Column")
    Organization = apps.get_model("orgs", "Organization")

    new_db_fields = [
        {
            'column_name': 'geocoding_confidence',
            'table_name': 'PropertyState',
            'display_name': 'Geocoding Confidence',
            'data_type': 'number',
        }, {
            'column_name': 'geocoding_confidence',
            'table_name': 'TaxLotState',
            'display_name': 'Geocoding Confidence',
            'data_type': 'number',
        }
    ]

    # Go through all the organizations
    for org in Organization.objects.all():
        for new_db_field in new_db_fields:
            columns = Column.objects.filter(
                organization_id=org.id,
                table_name=new_db_field['table_name'],
                column_name=new_db_field['column_name'],
                is_extra_data=False,
            )

            if not columns.count():
                new_db_field['organization_id'] = org.id
                Column.objects.create(**new_db_field)
            elif columns.count() == 1:
                # If the column exists, then just update the display_name,
                ↪and data_type if empty
                c = columns.first()
                if c.display_name is None or c.display_name == '':
                    c.display_name = new_db_field['display_name']
                if c.data_type is None or c.data_type == '' or c.data_
                ↪type == 'None':
                    c.data_type = new_db_field['data_type']
                    c.save()
            else:
                print(" More than one column returned")

class Migration(migrations.Migration):
    dependencies = [
        ('seed', '0090_auto_20180425_1154'),
    ]

    operations = [
        ... existing db migrations ...,
        migrations.RunPython(forwards),
    ]
```

3. Run migrations `./manage.py migrate`
4. Run unit tests, fix failures. Below is a list of files that need to be fixed (this is not an exhaustive list)

- test_mapping_data.py:test_keys
- test_columns.py:test_column_retrieve_schema
- test_columns.py:test_column_retrieve_db_fields

1. (Optional) Update example files to include new fields
2. Test import workflow with mapping to new fields

8.3 NginX Notes

Toggle *maintenance mode* to display a maintenance page and prevent access to all site resources including API endpoints:

```
docker exec seed_web ./docker/maintenance.sh on
docker exec seed_web ./docker/maintenance.sh off
```

8.4 AngularJS Integration Notes

8.4.1 Template Tags

Angular and Django both use `{{` and `}}` as variable delimiters, and thus the AngularJS variable delimiters are renamed `{%` and `%}`.

```
window.BE.apps.seed = angular.module('BE.seed', ['$interpolateProvider'], function (
↪ $interpolateProvider) {
    $interpolateProvider.startSymbol("{%");
    $interpolateProvider.endSymbol("%}");
});
```

8.4.2 Django CSRF Token and AJAX Requests

For ease of making angular *\$http* requests, we automatically add the CSRF token to all *\$http* requests as recommended by <http://django-angular.readthedocs.io/en/latest/integration.html#xmlhttprequest>

```
window.BE.apps.seed.run(function ($http, $cookies) {
    $http.defaults.headers.common['X-CSRFToken'] = $cookies['csrftoken'];
});
```

8.4.3 Routes and Partial or Views

Routes in *static/seed/js/seed.js* (the normal angularjs *app.js*)

```
SEED_app.config(['stateHelperProvider', '$urlRouterProvider', '$locationProvider',
↪ function (stateHelperProvider, $urlRouterProvider, $locationProvider) {
    stateHelperProvider
        .state({
            name: 'home',
```

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```

    url: '/',
    templateUrl: static_url + 'seed/partials/home.html'
  })
  .state({
    name: 'profile',
    url: '/profile',
    templateUrl: static_url + 'seed/partials/profile.html',
    controller: 'profile_controller',
    resolve: {
      auth_payload: ['auth_service', '$q', 'user_service', function (auth_service,
→ $q, user_service) {
        var organization_id = user_service.get_organization().id;
        return auth_service.is_authorized(organization_id, ['requires_superuser']);
      }],
      user_profile_payload: ['user_service', function (user_service) {
        return user_service.get_user_profile();
      }]
    }
  });
});
});

```

HTML partials in *static/seed/partials/*

8.5 Logging

Information about error logging can be found here - <https://docs.djangoproject.com/en/1.7/topics/logging/>

Below is a standard set of error messages from Django.

A logger is configured to have a log level. This log level describes the severity of the messages that the logger will handle. Python defines the following log levels:

```

DEBUG: Low level system information for debugging purposes
INFO: General system information
WARNING: Information describing a minor problem that has occurred.
ERROR: Information describing a major problem that has occurred.
CRITICAL: Information describing a critical problem that has occurred.

```

Each message that is written to the logger is a Log Record. The log record is stored in the web server & Celery

8.6 BEDES Compliance and Managing Columns

Columns that do not represent hardcoded fields in the application are represented using a Django database model defined in the `seed.models` module. The goal of adding new columns to the database is to create `seed.models.Column` records in the database for each column to import. Currently, the list of Columns is dynamically populated by importing data.

There are default mappings for ESPM are located here:

<https://github.com/SEED-platform/seed/blob/develop/seed/lib/mappings/data/pm-mapping.json>

8.7 Resetting the Database

This is a brief description of how to drop and re-create the database for the seed application.

The first two commands below are commands distributed with the Postgres database, and are not part of the seed application. The third command below will create the required database tables for seed and setup initial data that the application expects (initial columns for BEDES). The last command below (spanning multiple lines) will create a new superuser and organization that you can use to login to the application, and from there create any other users or organizations that you require.

Below are the commands for resetting the database and creating a new user:

```
createuser -U seed seeduser

psql -c 'DROP DATABASE "seeddb"'
psql -c 'CREATE DATABASE "seeddb" WITH OWNER = "seeduser";'
psql -c 'GRANT ALL PRIVILEGES ON DATABASE "seeddb" TO seeduser;'
psql -c 'ALTER USER "seeduser" CREATEDB CREATEROLE SUPERUSER;'
psql -d seeddb -c 'CREATE EXTENSION IF NOT EXISTS postgis;'
psql -d seeddb -c 'CREATE EXTENSION IF NOT EXISTS timescaledb;'
psql -d seeddb -c 'SELECT timescaledb_pre_restore();'
psql -d seeddb -c 'SELECT timescaledb_post_restore();'

./manage.py migrate
./manage.py create_default_user \
    --username=demo@seed-platform.org \
    --password=password \
    --organization=testorg
```

8.8 Restoring a Database Dump

```
psql -c 'DROP DATABASE "seeddb";'
psql -c 'CREATE DATABASE "seeddb" WITH OWNER = "seeduser";'
psql -c 'GRANT ALL PRIVILEGES ON DATABASE "seeddb" TO "seeduser";'
psql -c 'ALTER USER "seeduser" CREATEDB CREATEROLE SUPERUSER;'
psql -d seeddb -c 'CREATE EXTENSION IF NOT EXISTS postgis;'
psql -d seeddb -c 'CREATE EXTENSION IF NOT EXISTS timescaledb;'
psql -d seeddb -c 'SELECT timescaledb_pre_restore();'

# restore a previous database dump (must be pg_restore 12+)
/usr/lib/postgresql/12/bin/pg_restore -U seeduser -d seeddb /backups/prod-backups/
↪ seedv2_20191203_000002.dump

psql -d seeddb -c 'SELECT timescaledb_post_restore();'

./manage.py migrate

# if needed add a user to the database
./manage.py create_default_user \
    --username=demo@seed-platform.org \
    --password=password \
    --organization=testorg

# if restoring a seedv2 backup to a different deployment update the site settings for ↪
↪ password reset emails
```

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```
./manage.py shell

from django.contrib.sites.models import Site
site = Site.objects.first()
site.domain = 'dev1.seed-platform.org'
site.name = 'SEED Dev1'
site.save()
```

8.9 Migrating the Database

Migrations are handles through Django; however, various versions have customs actions for the migrations. See the migrations page for more information based on the version of SEED.

8.10 Testing

JS tests can be run with Jasmine at the url */angular_js_tests/*.

Python unit tests are run with

```
python manage.py test --settings=config.settings.test
```

Note on geocode-related testing: Most of these tests use VCR.py and cassettes to capture and reuse recordings of HTTP requests and responses. Given that, unless you want to make changes and/or refresh the cassettes/recordings, there isn't anything needed to run the geocode tests.

In the case that the geocoding logic/code is changed or you'd like to the verify the MapQuest API is still working as expected, you'll need to run the tests with a small change. Namely, you'll want to provide the tests with an API key via an environment variable called "TESTING_MAPQUEST_API_KEY" or within your local_untracked.py file with that same variable name.

In order to refresh the actual cassettes, you'll just need to delete or move the old ones which can be found at "seed/tests/data/vcr_cassettes". The API key should be hidden within the cassettes, so these new cassettes can and should be pushed to GitHub.

Run coverage using

```
coverage run manage.py test --settings=config.settings.test
coverage report --fail-under=83
```

Python compliance uses PEP8 with flake8

```
flake8
# or
tox -e flake8
```

JS Compliance uses jshint

```
jshint seed/static/seed/js
```

8.11 Best Practices

1. Make sure there is an issue created for items you are working on (for tracking purposes and so that the item appears in the changelog for the release)
2. **Use the following labels on the GitHub issue:** **Feature** (features will appear as “New” item in the changelog) **Enhancement** (these will appear as “Improved” in the changelog) **Bug** (these will appear as “Fixed” in the changelog)
3. Move the ticket/issue to ‘In Progress’ in the GitHub project tracker when you begin work
4. Branch off of the ‘develop’ branch (unless it’s a hotfix for production)
5. Write a test for the code added.
6. Make sure to test locally. note that all branches created and pushed to GitHub will also be tested automatically.
7. When done, create a pull request (you can group related issues together in the same PR). Assign a reviewer to look over the code
8. Use the “DO NOT MERGE” label for Pull Requests that should not be merged
9. When PR has been reviewed and approved, move the ticket/issue to the ‘Ready to Deploy to Dev’ box in the GitHub project tracker.

8.12 Git Naming Conventions

Commit messages should follow the format of

```
<type>[( optional scope )]: <subject>

[optional body]
```

type must be one of the following:

- **docs:** Changes to the documentation (e.g. improving docstring, updating this file, etc)
- **feat:** Adds a new feature
- **fix:** A bug fix
- **refactor:** Changes that don’t fix a bug or add a new feature
- **style:** Changes that don’t affect the meaning of code (e.g. whitespace)
- **test:** Adding or correcting tests

scope is optional for commit messages, and should indicate the general area of the application affected.

subject is a short description of the changes in imperative present tense (such as “add function to _”, not “added function”)

Branches should be named as [`<optional issue number> -`]`<type>/<scope>`, where scope is the general scope affected, or if creating a feature branch, a shortened name of the feature being added. If scope is more than one word, it should be separated by dashes.

Pull Request titles should follow the format [`# optional issue number`] `<type>[(optional scope)]`: `<subject>`, following the same conventions as commit messages.

Commit examples:

- `feat(models): add date_modified field to MyModel`

- refactor: change var to let/const in frontend
- docs: update release instructions

Branch examples:

- 1234-feat/buildingsync-v2.3-import
- 5678-refactor/org-views-auth
- fix/error-mapping-pm-taxlots

Pull request examples:

- #1234 feat(models): add date_modified to MyModel
- #4567 refactor: change var to let/const in frontend

8.13 Release Instructions

To make a release do the following:

1. Github admin user, on develop branch: update the `package.json` file with the most recent version number. Always use MAJOR.MINOR.RELEASE.
2. Update the `docs/sources/migrations.rst` file with any required actions.
3. Run the `docs/scripts/change_log.py` script and add the changes to the `CHANGELOG.md` file for the range of time between last release and this release. Only add the *Closed Issues*. Also make sure that all the pull requests have a related Issue in order to be included in the change log.

```
python docs/scripts/change_log.py -k GITHUB_API_TOKEN -s 2020-09-25 -e 2020-12-28
```

4. Paste the results (remove unneeded Accepted Pull Requests and the new issues) into the `CHANGELOG.md`. Cleanup the formatting (if needed).
5. Make sure that any new UI needing localization has been tagged for translation, and that any new translation keys exist in the lokalise.com project. (see translation documentation).
6. Once develop passes, then create a new PR from develop to main.
7. Draft new Release from Github (<https://github.com/SEED-platform/seed/releases>).
8. Include list of changes since previous release (i.e. the content in the `CHANGELOG.md`)
9. Verify that the Docker versions are built and pushed to Docker hub (<https://hub.docker.com/r/seedplatform/seed/tags/>).
10. Go to Read the Docs and enable the latest version to be active (<https://readthedocs.org/dashboard/seed-platform/versions/>)

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10.1 For SEED-Platform Users

Please visit our User Support website for tutorials and documentation to help you learn how to use SEED-Platform.

<https://sites.google.com/a/lbl.gov/seed/>

There is also a link to the SEED-Platform Users forum, where you can connect with other users.

<https://groups.google.com/forum/#!forum/seed-platform-users>

For direct help on a specific problem, please email: SEED-Support@lists.lbl.gov

10.2 For SEED-Platform Developers

The Open Source code is available on the Github organization SEED-Platform:

<https://github.com/SEED-platform>

Please join the SEED-Platform Dev forum where you can connect with other developers.

<https://groups.google.com/forum/#!forum/seed-platform-dev>

FREQUENTLY ASKED QUESTIONS

Here are some frequently asked questions and/or issues.

- *Questions*
 - *What is the SEED Platform?*
- *Issues*
 - *Why is the domain set to example.com?*
 - *Why aren't the static assets being served correctly?*

11.1 Questions

11.1.1 What is the SEED Platform?

The Standard Energy Efficiency Data (SEED) Platform™ is a web-based application that helps organizations easily manage data on the energy performance of large groups of buildings. Users can combine data from multiple sources, clean and validate it, and share the information with others. The software application provides an easy, flexible, and cost-effective method to improve the quality and availability of data to help demonstrate the economic and environmental benefits of energy efficiency, to implement programs, and to target investment activity.

The SEED application is written in Python/Django, with AngularJS, Bootstrap, and other JavaScript libraries used for the front-end. The back-end database is required to be PostgreSQL.

The SEED web application provides both a browser-based interface for users to upload and manage their building data, as well as a full set of APIs that app developers can use to access these same data management functions.

Work on SEED Platform is managed by the National Renewable Energy Laboratory, with funding from the U.S. Department of Energy.

11.2 Issues

11.2.1 Why is the domain set to example.com?

If you see example.com in the emails that are sent from your hosted version of SEED then you will need to update your django sites object in the database.

```
$ ./manage.py shell

from django.contrib.sites.models import Site
one = Site.objects.all()[0]
one.domain = 'newdomain.org'
one.name = 'SEED'
one.save()
```

11.2.2 Why aren't the static assets being served correctly?

Make sure that your local_untracked.py file does not have STATICFILES_STORAGE set to anything. If so, then comment out that section and redeploy/recollect/compress your static assets.

UPDATING THIS DOCUMENTATION

This python code documentation was generated by running the following:

```
$ pip install -r requirements/local.txt
$ sphinx-apidoc -o docs/source/modules . seed/lib/mcm seed/lib/superperms
$ cd docs
$ make html
```


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