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# otoole Documentation

*Release unknown*

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## Contents

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<b>1 Description</b>	<b>3</b>
1.1 Dependencies . . . . .	4
<b>2 Installation</b>	<b>5</b>
<b>3 Usage</b>	<b>7</b>
<b>4 Contributing</b>	<b>9</b>
<b>5 Getting Started</b>	<b>11</b>
<b>6 Contents</b>	<b>13</b>
6.1 License . . . . .	13
6.2 Contributors . . . . .	13
6.3 Changelog . . . . .	13
6.4 otoole . . . . .	14
<b>7 Indices and tables</b>	<b>27</b>
<b>Python Module Index</b>	<b>29</b>
<b>Index</b>	<b>31</b>



A Python toolkit to support use of OSeMOSYS

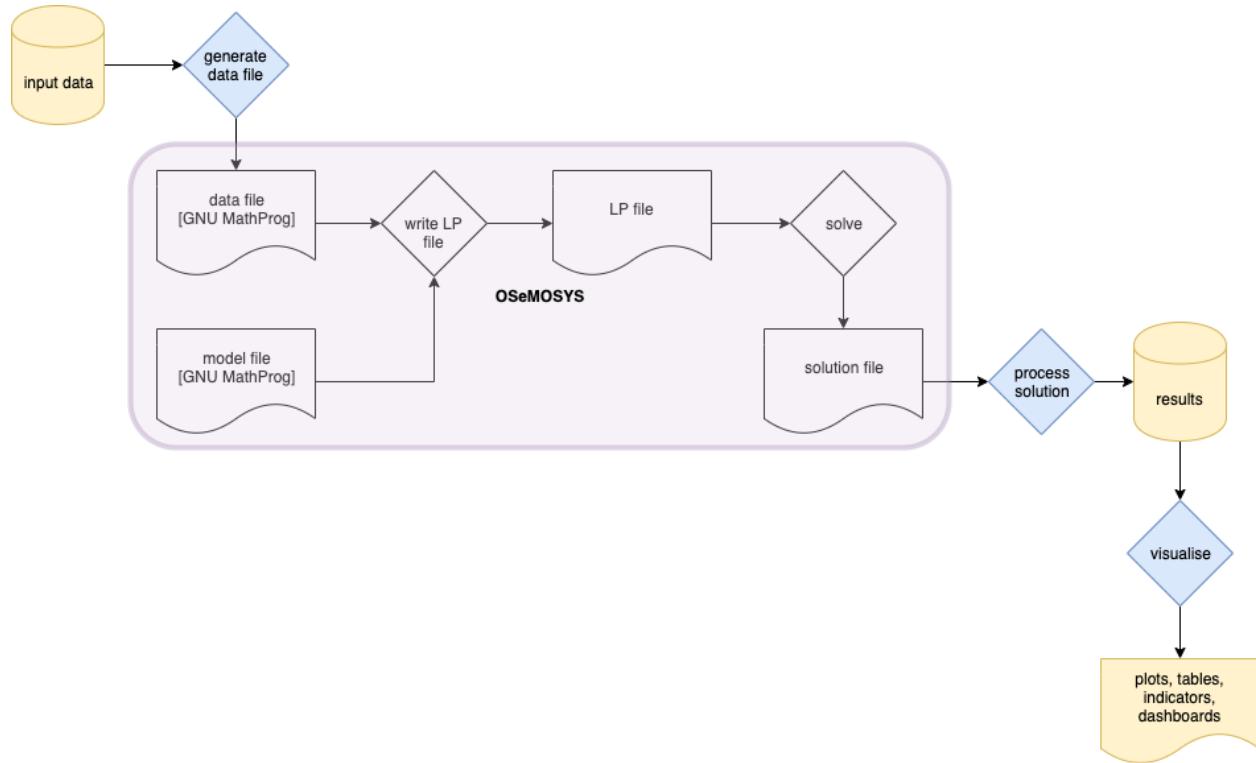


# CHAPTER 1

## Description

**otoole** is a Python package which provides a command-line interface for users of OSeMOSYS.

The aim of the package is to provide a community resource which centralises the commonly used pre- and post-processing steps around the use of OSeMOSYS.



**otoole** aims to support different ways of storing input data and results, including csv files, databases, datapackages and Excel workbooks, as well as different implementations of the OSeMOSYS model.

## 1.1 Dependencies

*otoole* requires a number of dependencies, including pygraphviz, which can be difficult to install on Windows.

The easiest way to install the dependencies is to use miniconda.

1. Obtain the [miniconda](#) package:
2. Add the **conda-forge** channel `conda config --add channels conda-forge`
3. Create a new Python environment `conda create -n myenv python=3.7 networkx datapackage pandas pulp graphviz xlrd`
4. Activate the new environment `conda activate myenv`
5. Use pip to install otoole `pip install otoole`

# CHAPTER 2

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## Installation

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Install **otoole** using pip:

```
pip install otoole
```

To upgrade **otoole** using pip:

```
pip install otoole --upgrade
```



# CHAPTER 3

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## Usage

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For detailed instructions of the use of the tool, run the command line help function:

```
otoole --help
```



# CHAPTER 4

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## Contributing

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New ideas and bugs are found on the repository Issue Tracker. Please do contribute by discussing and developing these ideas further, or by developing the codebase.

To contribute directly to the documentation of code development, you first need to install the package in *develop mode*:

```
git clone http://github.com/OSeMOSYS/otoole
cd otoole
git checkout <branch you wish to use>
python setup.py develop
```

Now, all changes made in the codebase will automatically be reflected in the installed Python version accessible on the command line or from importing otoole modules into other Python packages.



# CHAPTER 5

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## Getting Started

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Install `otoole` using pip:

```
pip install otoole
```

Check the version installed:

```
otoole -V
```

Download an OSeMOSYS datapackage and convert it to a modelfile:

```
otoole convert datapackage datafile https://zenodo.org/record/3479823/files/KTH-dESA/  
→simplicity-v0.1a0.zip simplicity.txt
```

Visualise the Reference Energy System:

```
otoole viz res https://zenodo.org/record/3479823/files/KTH-dESA/simplicity-v0.1a0.zip  
→res.png && open res.png
```

Alternatively, convert an OSeMOSYS datafile to a datapackage:

```
otoole convert datafile datapackage simplicity.txt simplicity
```

Validate the names of technologies and fuels against the standard naming convention and identify isolated fuels, emissions and technologies:

```
otoole validate datapackage https://zenodo.org/record/3479823/files/KTH-dESA/  
→simplicity-v0.1a0.zip
```



# CHAPTER 6

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## Contents

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### 6.1 License

The MIT License (MIT)

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### 6.2 Contributors

- Will Usher <[wusher@kth.se](mailto:wusher@kth.se)>

### 6.3 Changelog

#### 6.3.1 Version 0.6

- Fixes bug in writing to datafile where any values that matched the default were ignored

- Adds CLI command to convert to Excel from datapackage e.g. `otoole convert datapackage excel <datapackage.json> <to.xlsx>`
- Uses black code style and uses mypy and black for syntax checking and formatting

### **6.3.2 Version 0.5**

- Add validation of names and fuels in datapackage - Adds `validate` command to the command-line interface
  - Define a validation config as a YAML file for names

### **6.3.3 Version 0.4**

- Tidy up the command line interface
- Convert to/from SQLite database from/to datapackage
- Remove rotten pygraphviz dependency

### **6.3.4 Version 0.3**

- Create a Tabular Data Package from an OSeMOSYS datafile

### **6.3.5 Version 0.2**

- Visualise a reference energy system from a Tabular Data Package

### **6.3.6 Version 0.1**

- Add CPLEX to csv or CBC solution file conversion script
- Create CSV files in a folder from an excel workbook
- Create a Tabular Data Package from a folder of CSVs
- Create an OSeMOSYS datafile from a Tabular Data Package
- Adds a command line interface to access these tools

## **6.4 otoole**

### **6.4.1 otoole package**

#### **Subpackages**

##### **otoole.preprocess package**

#### **Submodules**

## otoole.preprocess.create\_datapackage module

Creates a datapackage from a collection of CSV files of OSeMOSYS input data

- Uses Frictionless Data datapackage concept to build a JSON schema of the dataset
- Enforces relations between sets and indices in parameter files

`otoole.preprocess.create_datapackage.convert_datapackage_to_sqlite(path_to_datapackage, sqlite)`

Load and save table to SQLite

`otoole.preprocess.create_datapackage.generate_package(path_to_package)`

Creates a datapackage in folder `path_to_package`

`[{'fields': 'REGION', 'reference': {'resource': 'REGION', 'fields': 'VALUE'}}]`

`otoole.preprocess.create_datapackage.main(wide_folder, narrow_folder)`

`otoole.preprocess.create_datapackage.validate_contents(path_to_package)`

## otoole.preprocess.datafile\_to\_datapackage module

### otoole.preprocess.xlsx\_to\_osemosys module

Extract data from spreadsheets and write to an OSeMOSYS datafile

Reads and writes the following OSeMOSYS parameters and sets to and from files on disk.

## Notes

### Sets

These are the standard sets:

```
set YEAR;
set TECHNOLOGY;
set TIMESLICE;
set FUEL;
set EMISSION;
set MODE_OF_OPERATION;
set REGION;
set SEASON;
set DAYTYPE;
set DAILYTIMEBRACKET;
set FLEXIBLEDEMANDTYPE;
set STORAGE;
```

All sets are written in a CSV file in one column of values with header of VALUE. For example, the CSV file for set YEAR:

VALUE
2015
2016
2017
2018

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2019
2020

Sets are written into the OSeMOSYS data file using the following syntax:

set YEAR := 2014 2015 2016 2017 2018 2019 2020 ;
--

**param In general, parameters can be written into CSV files in narrow or wide**

**param formats. In narrow format, the CSV file should look as follows::**

REGION,TIMESLICE,YEAR,VALUE	SIMPLICITY, ID, 2014, 0.1667	SIMPLICITY	
ITY, IN, 2014, 0.0833	SIMPLICITY, SD, 2014, 0.1667	SIMPLICITY, SN, 2014, 0.0833	SIMPLICITY
ITY, WD, 2014, 0.3333	SIMPLICITY, WN, 2014, 0.1667		

In wide format, the final index is transposed:

REGION, TIMESLICE, 2014, 2015, ...
SIMPLICITY, ID, 0.1667, 0.1667
SIMPLICITY, IN, 0.0833, 0.0833
SIMPLICITY, SD, 0.1667, 0.1667
SIMPLICITY, SN, 0.0833, 0.0833
SIMPLICITY, WD, 0.3333, 0.3333
SIMPLICITY, WN, 0.1667, 0.1667

Wide format is a bit nicer to use with spreadsheets, as it allows you to more easily plot graphs of values, but narrow format is a more flexible and easily manipulated data format.

Writing parameteters:

1-dimensional e.g. DiscountRate{r in REGION}

2-dimension e.g. YearSplit{l in TIMESLICE, y in YEAR}

n-dimensional e.g. DaysInDayType{ls in SEASON, ld in DAYTYPE, y in YEAR}

Global parameters:

param YearSplit{l in TIMESLICE, y in YEAR};
param DiscountRate{r in REGION};
param DaySplit{lh in DAILYTIMEBRACKET, y in YEAR};
param Conversionls{l in TIMESLICE, ls in SEASON};
param Conversionld{l in TIMESLICE, ld in DAYTYPE};
param Conversionlh{l in TIMESLICE, lh in DAILYTIMEBRACKET};
param DaysInDayType{ls in SEASON, ld in DAYTYPE, y in YEAR};
param TradeRoute{r in REGION, rr in REGION, f in FUEL, y in YEAR};
param DepreciationMethod{r in REGION};

Demand parameters:

param SpecifiedAnnualDemand{r in REGION, f in FUEL, y in YEAR};
param SpecifiedDemandProfile{r in REGION, f in FUEL, l in TIMESLICE, y in YEAR};
param AccumulatedAnnualDemand{r in REGION, f in FUEL, y in YEAR};

Performance parameters:

param CapacityToActivityUnit{r in REGION, t in TECHNOLOGY};
param TechWithCapacityNeededToMeetPeakTS{r in REGION, t in TECHNOLOGY};
param CapacityFactor{r in REGION, t in TECHNOLOGY, l in TIMESLICE, y in YEAR};
param AvailabilityFactor{r in REGION, t in TECHNOLOGY, y in YEAR};

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```
param OperationalLife{r in REGION, t in TECHNOLOGY};
param ResidualCapacity{r in REGION, t in TECHNOLOGY, y in YEAR};
param InputActivityRatio{r in REGION, t in TECHNOLOGY, f in FUEL,
    m in MODE_OF_OPERATION, y in YEAR};
param OutputActivityRatio{r in REGION, t in TECHNOLOGY, f in FUEL,
    m in MODE_OF_OPERATION, y in YEAR};
```

Technology Costs parameters:

```
param CapitalCost{r in REGION, t in TECHNOLOGY, y in YEAR};
param VariableCost{r in REGION, t in TECHNOLOGY, m in MODE_OF_OPERATION, y in YEAR};
param FixedCost{r in REGION, t in TECHNOLOGY, y in YEAR};
```

Storage parameters:

```
param TechnologyToStorage{r in REGION, t in TECHNOLOGY, s in STORAGE,
    m in MODE_OF_OPERATION};
param TechnologyFromStorage{r in REGION, t in TECHNOLOGY, s in STORAGE,
    m in MODE_OF_OPERATION};
param StorageLevelStart{r in REGION, s in STORAGE};
param StorageMaxChargeRate{r in REGION, s in STORAGE};
param StorageMaxDischargeRate{r in REGION, s in STORAGE};
param MinStorageCharge{r in REGION, s in STORAGE, y in YEAR};
param OperationalLifeStorage{r in REGION, s in STORAGE};
param CapitalCostStorage{r in REGION, s in STORAGE, y in YEAR};
param ResidualStorageCapacity{r in REGION, s in STORAGE, y in YEAR};
```

Capacity Constraints parameters:

```
param CapacityOfOneTechnologyUnit{r in REGION, t in TECHNOLOGY, y in YEAR};
param TotalAnnualMaxCapacity{r in REGION, t in TECHNOLOGY, y in YEAR};
param TotalAnnualMinCapacity{r in REGION, t in TECHNOLOGY, y in YEAR};
```

Investment Constraints parameters:

```
param TotalAnnualMaxCapacityInvestment{r in REGION, t in TECHNOLOGY, y in YEAR};
param TotalAnnualMinCapacityInvestment{r in REGION, t in TECHNOLOGY, y in YEAR};
```

Activity Constraints parameters:

```
param TotalTechnologyAnnualActivityUpperLimit{r in REGION, t in TECHNOLOGY,
    y in YEAR};
param TotalTechnologyAnnualActivityLowerLimit{r in REGION, t in TECHNOLOGY,
    y in YEAR};
param TotalTechnologyModelPeriodActivityUpperLimit{r in REGION, t in TECHNOLOGY};
param TotalTechnologyModelPeriodActivityLowerLimit{r in REGION, t in TECHNOLOGY};
```

Reserve Margin parameters:

```
param ReserveMarginTagTechnology{r in REGION, t in TECHNOLOGY, y in YEAR};
param ReserveMarginTagFuel{r in REGION, f in FUEL, y in YEAR};
param ReserveMargin{r in REGION, y in YEAR};
```

RE Generation Target parameters:

```
param RETagTechnology{r in REGION, t in TECHNOLOGY, y in YEAR};
param RETagFuel{r in REGION, f in FUEL, y in YEAR};
param REMinProductionTarget{r in REGION, y in YEAR};
```

Emissions & Penalties parameters:

```
param EmissionActivityRatio{r in REGION, t in TECHNOLOGY, e in EMISSION,
                           m in MODE_OF_OPERATION, y in YEAR};
param EmissionsPenalty{r in REGION, e in EMISSION, y in YEAR};
param AnnualExogenousEmission{r in REGION, e in EMISSION, y in YEAR};
param AnnualEmissionLimit{r in REGION, e in EMISSION, y in YEAR};
param ModelPeriodExogenousEmission{r in REGION, e in EMISSION};
param ModelPeriodEmissionLimit{r in REGION, e in EMISSION};
```

`otoole.preprocess.xlsx_to_osemosys.generate_csv_from_excel(input_workbook, output_folder)`

Generate a folder of CSV files from a spreadsheet

#### Parameters

- `input_workbook (str)` – Path to spreadsheet containing OSeMOSYS data
- `output_folder (str)` – Path of the folder containing the csv files

`otoole.preprocess.xlsx_to_osemosys.read_config(path_to_user_config: str = None) → Dict[KT, VT]`

Reads the config file holding expected OSeMOSYS set and parameter dimensions

**Parameters** `path_to_user_config (str, optional, default=None)` – Optional path to a user defined configuration file

#### Returns

**Return type** `dict`

## otoole.preprocess.longify\_data module

Read in a folder of irregular wide-format csv files and write them out as narrow csvs

`otoole.preprocess.longify_data.check_datatypes(narrow: pandas.core.frame.DataFrame, config_details: Dict[KT, VT], parameter: str) → pandas.core.frame.DataFrame`

Checks a parameters datatypes

#### Parameters

- `narrow (pandas.DataFrame)` – The parameter data
- `config_details (dict)` – The configuration dictionary
- `parameter (str)` – The name of the parameter

`otoole.preprocess.longify_data.check_parameter(df, config_details, name)`

`otoole.preprocess.longify_data.check_set(df, config_details, name)`

`otoole.preprocess.longify_data.check_set_datatype(narrow: pandas.core.frame.DataFrame, config_details: Dict[KT, VT], set_name: str) → pandas.core.frame.DataFrame`

Checks the datatypes of a set\_name dataframe

#### Parameters

- **narrow** (`pandas.DataFrame`) – The set data
- **config\_details** (`dict`) – The configuration dictionary
- **set\_name** (`str`) – The name of the set

`otoole.preprocess.longify_data.main(output_folder, narrow_folder)`

Read in a folder of irregular wide-format files and write as narrow csvs

`otoole.preprocess.longify_data.write_out_dataframe(folder, parameter, df)`

Writes out a dataframe as a csv into the data subfolder of a datapackage

#### Parameters

- **folder** (`str`) –
- **parameter** (`str`) –
- **df** (`pandas.DataFrame`) –

## otoole.preprocess.narrow\_to\_datafile module

```
class otoole.preprocess.narrow_to_datafile.DataPackageTo(datapackage: str,
                                                       datafilepath: str, sql: bool = False)
```

Bases: `object`

Convert a data package to another format

#### Parameters

- **datapackage** (`str`) – The path to the databackage
- **datafilepath** (`str`) – The path to the destination file or folder
- **sql** (`bool`, `default=False`) – Flag to set whether the source datapackage is in sqlite format

`convert()`

Perform the conversion from datapackage to destination format

```
class otoole.preprocess.narrow_to_datafile.DataPackageToCsv(datapackage: str,
                                                               datafilepath: str, sql: bool = False)
```

Bases: `otoole.preprocess.narrow_to_datafile.DataPackageTo`

```
class otoole.preprocess.narrow_to_datafile.DataPackageToExcel(datapackage: str, datafilepath: str, sql: bool = False)
```

Bases: `otoole.preprocess.narrow_to_datafile.DataPackageTo`

`otoole.preprocess.narrow_to_datafile.convert_datapackage_to_datafile(path_to_datapackage, path_to_datafile)`

`otoole.preprocess.narrow_to_datafile.convert_datapackage_to_excel(path_to_datapackage, path_to_excel)`

## Module contents

### otoole.results package

#### Submodules

##### otoole.results.convert module

Converts an OSeMOSYS solution file from CPLEX, CBC or GLPK into CBC or CSV format

```
class otoole.results.convert.ConvertLine(data: List[T], start_year: int, end_year: int, output_format='cbc')
```

Bases: object

Abstract class which defines the interface to the family of convertors

Inherit this class and implement the `_do_it()` method to produce the data to be written out into a new format

#### Example

```
>>> cplex_line = "AnnualCost          REGION  CDBACKSTOP      1.0      0.0      "
   ↵137958.8400384134"
>>> convertor = RegionTechnology()
>>> convertor.convert()
VariableName(REGION, TECHCODE01, 2015)      42.69      0\n
VariableName(REGION, TECHCODE01, 2017)      137958.84      0\n
```

`convert() → List[str]`

`convert_cbc() → List[str]`

Format the data for writing to a CBC file

`convert_csv() → List[str]`

Format the data for writing to a csv file

```
class otoole.results.convert.RegionTechnology(data: List[T], start_year: int, end_year: int, output_format='cbc')
```

Bases: `otoole.results.convert.ConvertLine`

```
class otoole.results.convert.RegionTimeSliceTechnologyMode(data: List[T],
                                                               start_year: int,
                                                               end_year: int, output_format='cbc')
```

Bases: `otoole.results.convert.ConvertLine`

```
otoole.results.convert.convert_cplex_file(cplex_filename: str, output_filename: str,
                                           start_year=2015, end_year=2070, output_format='cbc')
```

Converts a CPLEX solution file into that of the CBC solution file

#### Parameters

- `cplex_filename(str)` – Path to the transformed CPLEX solution file
- `output_filename(str)` – Path for the processed data to be written to

```
otoole.results.convert.process_line(line: str, start_year: int, end_year: int, output_format: str) → List[str]
```

Processes an individual line in a CPLEX file

A different ConvertLine implementation is chosen depending upon the variable name

#### Parameters

- **line** (*str*) –
- **start\_year** (*int*) –
- **end\_year** (*int*) –
- **output\_format** (*str*) – The file format required - either csv or cbc

### Module contents

#### otoole.visualise package

##### Submodules

#### otoole.visualise.res module

Visualise the reference energy system

`otoole.visualise.res.add_fuel (package_rows: List[List[T]]) → List[Tuple[str, Dict[KT, VT]]]`  
Add fuel nodes

**Parameters** `package_rows` (*list of dict*) –

**Returns** A list of node names along with a dict of node attributes

**Return type** list of tuple

`otoole.visualise.res.build_graph (nodes: List[Tuple[str, Dict[KT, VT]]], edges: List[Tuple[str, Dict[KT, VT]]]) → networkx.classes.digraph.DiGraph`  
Builds the graph using networkx

**Parameters**

- **nodes** (*list*) – A list of node tuples
- **edges** (*list*) – A list of edge tuples

**Returns** A directed graph representing the reference energy system

**Return type** networkx.DiGraph

`otoole.visualise.res.create_graph (datapackage: datapackage.package.Package)`  
Creates a graph of technologies and fuels

**Parameters** `datapackage` (`datapackage.Package`) –

**Returns** networkx.DiGraph

**Return type** graph

`otoole.visualise.res.create_res (path_to_datapackage: str, path_to_resfile: str)`  
Create a reference energy system diagram from a Tabular Data Package

**Parameters**

- **path\_to\_datapackage** (*str*) – The path to the `datapackage.json`
- **path\_to\_resfile** (*str*) – The path to the image file to be created

otoole.visualise.res.**draw\_graph**(graph, path\_to\_resfile)

Layout the graph and write it to disk

Uses pygraphviz to set some graph attributes, layout the graph and write it to disk

**Parameters** `path_to_resfile(str)` – The file path of the PNG image file that will be created

otoole.visualise.res.**extract\_edges**(package\_rows: List[Dict[KT, VT]], from\_column: str, to\_column: str, parameter\_name: str, directed: bool = True) → List[Tuple[str, str, Dict[KT, VT]]]

Add edges from a Tabular Data Table

**Parameters**

- `package_rows(list of dict)` –
- `from_column(str)` – The name of the column to use as source of the edge
- `to_column(str)` – The name of the column to use as a destination of the edge
- `parameter_name(str)` – The name of the parameter
- `directed(bool, default=True)` – Specifies whether the edge should have an arrow or not

**Returns** A list of edges with from/to nodes names and edge attributes

**Return type** list of tuple

otoole.visualise.res.**extract\_nodes**(package\_rows: List[List[T]], node\_type='technology', color='red', shape='circle') → List[Tuple[str, Dict[KT, VT]]]

Add nodes from a Tabular Data Table

**Parameters**

- `package_rows(list of dict)` –
- `node_type(str, default='technology')` –
- `color(str, default='red')` –
- `shape(str, default='circle')` –

**Returns** A list of nodes with attributes

**Return type** list of tuple

otoole.visualise.res.**load\_datapackage**(path\_to\_datapackage: str) → datapackage.Package

## Module contents

Visualise different aspects of an OSeMOSYS model and data

Provides the following commands:

```
otoole viz res <path_to_datapackage.json> <path_to_res_image>
```

otoole viz res generates an image of the reference energy system in a datapackage

otoole.visualise.**create\_res**(path\_to\_datapackage: str, path\_to\_resfile: str)

Create a reference energy system diagram from a Tabular Data Package

**Parameters**

- **path\_to\_datapackage** (*str*) – The path to the datapackage.json
- **path\_to\_resfile** (*str*) – The path to the image file to be created

## Submodules

### otoole.cli module

### otoole.exceptions module

**exception** otoole.exceptions.OtooleException

Bases: `Exception`

Base class for all otoole exceptions.

**exception** otoole.exceptions.OtooleRelationError (*resource*, *foreign\_resource*, *message*)

Bases: `otoole.exceptions.OtooleException`

Relations between input data is not correct

#### Parameters

- **resource** (*str*) – Name of the resource which is invalid
- **foreign\_resource** (*str*) – Name of the resource which is invalid
- **message** (*str*) – Error message

**exception** otoole.exceptions.OtooleValidationError (*resource*, *message*)

Bases: `otoole.exceptions.OtooleException`

Input data is invalid

#### Parameters

- **resource** (*str*) – Name of the resource which is invalid
- **message** (*str*) – Error message

### otoole.validate module

Ensures that technology and fuel names match the convention

For example, to validate the following list of names, you would use the config shown below:

```
theseUNIQUE_ENTRY1
are__UNIQUE_ENTRY2
all__UNIQUE_ENTRY1
validUNIQUE_ENTRY2
entryUNIQUE_ENTRY1
in__UNIQUE_ENTRY2
a____UNIQUE_ENTRY1
list_UNIQUE_ENTRY2
```

Create a yaml validation config with the following format:

```
codes:
  some_valid_codes:
    UNIQUE_ENTRY1: Description of unique entry 1
    UNIQUE_ENTRY2: Description of unique entry 2
```

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```

schema:
    schema_name:
        - name: first_entry_in_schema
            valid: ['these', 'are__', 'all__', 'valid', 'entry', 'in__', 'a__', 'list_']
            position: (1, 5) # a tuple representing the start and end position
        - name: second_entry_in_schema
            valid: some_valid_codes # references an entry in the codes section of the config
            position: (6, 19) # a tuple representing the start and end position

```

`otoole.validate.check_for_duplicates(codes: Sequence[T_co]) → bool`

`otoole.validate.compose_expression(schema: List[T]) → str`

Generates a regular expression from a schema

#### Returns

#### Return type str

`otoole.validate.compose_multi_expression(resource: List[T]) → str`

Concatenates multiple expressions using an OR operator

Use to validate elements using an OR operation e.g. the elements must match this expression OR the expression

`otoole.validate.create_schema(config: Dict[str, Dict[KT, VT]] = None) → Dict[KT, VT]`

Populate the dict of schema with codes from the validation config

**Parameters** `config (dict, default=None)` – A configuration dictionary containing codes and schema keys

`otoole.validate.identify_orphaned_fuels_techs(package) → Dict[str, str]`

Returns a list of fuels and technologies which are unconnected

#### Returns

#### Return type dict

`otoole.validate.main(file_format: str, filepath: str, config=None)`

`otoole.validate.read_validation_config()`

`otoole.validate.validate(expression: str, name: str) → bool`

Determine if name matches the expression

#### Parameters

- `expression (str)` –
- `name (str)` –

#### Returns

#### Return type bool

`otoole.validate.validate_resource(package, resource: str, schemas: List[Dict[KT, VT]])`

#### Parameters

- `package` –
- `resource (str)` –
- `schemas (List [Dict])` – The schema from which to create a validation expression

## Module contents

`otoole.read_datapackage(filepath: str, sql: bool = False)`  
Open an OSeMOSYS datapackage

### Parameters

- `filepath(str)` –
- `sql(bool, default=False)` –

`otoole.read_packaged_file(filename: str, module_name: str = None)`



# CHAPTER 7

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## Indices and tables

---

- genindex
- modindex
- search



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## Python Module Index

---

### 0

otoole, 25  
otoole.exceptions, 23  
otoole.preprocess.create\_datapackage,  
 15  
otoole.preprocess.xlsx\_to\_osemosys, 15  
otoole.preprocess.longify\_data, 18  
otoole.preprocess.narrow\_to\_datafile,  
 19  
otoole.results, 21  
otoole.results.convert, 20  
otoole.validate, 23  
otoole.visualise, 22  
otoole.visualise.res, 21



---

## Index

---

### A

`add_fuel()` (*in module otoole.visualise.res*), 21

### B

`build_graph()` (*in module otoole.visualise.res*), 21

### C

`check_datatypes()` (*in module otoole.preprocess.longify\_data*), 18

`check_for_duplicates()` (*in module otoole.validate*), 24

`check_parameter()` (*in module otoole.preprocess.longify\_data*), 18

`check_set()` (*in module otoole.preprocess.longify\_data*), 18

`check_set_datatype()` (*in module otoole.preprocess.longify\_data*), 18

`compose_expression()` (*in module otoole.validate*), 24

`compose_multi_expression()` (*in module otoole.validate*), 24

`convert()` (*otoole.preprocess.narrow\_to\_datafile.DataPackageToCsv* (*method*)), 19

`convert()` (*otoole.results.convert.ConvertLine* (*method*)), 20

`convert_cbc()` (*otoole.results.convert.ConvertLine* (*method*)), 20

`convert_cplex_file()` (*in module otoole.results.convert*), 20

`convert_csv()` (*otoole.results.convert.ConvertLine* (*method*)), 20

`convert_datapackage_to_datafile()` (*in module otoole.preprocess.narrow\_to\_datafile*), 19

`convert_datapackage_to_excel()` (*in module otoole.preprocess.narrow\_to\_datafile*), 19

`convert_datapackage_to_sqlite()` (*in module otoole.preprocess.create\_datapackage*), 15

`ConvertLine` (*class in otoole.results.convert*), 20

`create_graph()` (*in module otoole.visualise.res*), 21

`create_res()` (*in module otoole.visualise*), 22

`create_res()` (*in module otoole.visualise.res*), 21

`create_schema()` (*in module otoole.validate*), 24

### D

`DataPackageTo` (*class in module otoole.preprocess.narrow\_to\_datafile*), 19

`DataPackageToCsv` (*class in module otoole.preprocess.narrow\_to\_datafile*), 19

`DataPackageToExcel` (*class in module otoole.preprocess.narrow\_to\_datafile*), 19

`draw_graph()` (*in module otoole.visualise.res*), 21

### E

`extract_edges()` (*in module otoole.visualise.res*), 22

`extract_nodes()` (*in module otoole.visualise.res*), 22

### G

`DataPackageToCsvFromExcel` (*in module otoole.preprocess.excel\_to\_osemosys*), 18

`generate_package()` (*in module otoole.preprocess.create\_datapackage*), 15

### I

`identify_orphaned_fuels_techs()` (*in module otoole.validate*), 24

### L

`load_datapackage()` (*in module otoole.visualise.res*), 22

### M

`main()` (*in module otoole.preprocess.create\_datapackage*), 15

`main()` (*in module otoole.preprocess.longify\_data*), 19

`main()` (*in module otoole.validate*), 24

## O

otoole (*module*), 25  
otoole.exceptions (*module*), 23  
otoole.preprocess.create\_datapackage  
    (*module*), 15  
otoole.preprocess.excel\_to\_osemosys  
    (*module*), 15  
otoole.preprocess.longify\_data (*module*),  
    18  
otoole.preprocess.narrow\_to\_datafile  
    (*module*), 19  
otoole.results (*module*), 21  
otoole.results.convert (*module*), 20  
otoole.validate (*module*), 23  
otoole.visualise (*module*), 22  
otoole.visualise.res (*module*), 21  
OtooleException, 23  
OtooleRelationError, 23  
OtooleValidation, 23

## P

process\_line () (*in module otoole.results.convert*),  
    20

## R

read\_config ()                   (*in module otoole*)  
    *otoole.preprocess.excel\_to\_osemosys*, 18  
read\_datapackage () (*in module otoole*), 25  
read\_packaged\_file () (*in module otoole*), 25  
read\_validation\_config ()       (*in module otoole.validate*), 24  
RegionTechnology (*class in otoole.results.convert*),  
    20  
RegionTimeSliceTechnologyMode (*class in otoole.results.convert*), 20

## V

validate () (*in module otoole.validate*), 24  
validate\_contents ()           (*in module otoole.preprocess.create\_datapackage*), 15  
validate\_resource () (*in module otoole.validate*),  
    24

## W

write\_out\_dataframe ()       (*in module otoole.preprocess.longify\_data*), 19