**Software Installation:**

The main software repository is at <https://github.com/organizations/dopplerimager>. There are a number of repositories here, one for each instrument (containing instrument-specific code), one for the core SDI control software (/sdi) and one for the code to build the dll wrapper (/sdiexternal). This description will assume that the instrument-specific code for the new instrument has already been uploaded to GitHub (and exists as for example, /poker).

In /sdi there is an install script called install.bat. An easy way to install the software on a new machine is to go to <https://github.com/dopplerimager/sdi>, click on install.bat, and click on RAW (this will download the file). Open up a command prompt (on Windows 7 and higher you will need to right-click on the command prompt icon and select “Run As Administrator”). Change to the directory where install.bat was downloaded. As an example, I’ll assume you want to install both the core SDI software and the Poker Flat instrument-specific software. At the command prompt, you would type:

install.bat sdi poker

This will do a couple of things: it will first try to create the directory c:\users\sdi3000. If it is unable to do so, it will terminate. Assuming it succeeded, it will change to that directory, and run the Git commands to download (clone) the respective repositories from GitHub which were passed as arguments to the bat file (sdi and poker). If these clone’s succeed, the script will create the default directory tree (directories for data, log, settings, phasemaps, screencaptures). It will then print a friendly message reminding you what to do next (updating IDL and windows search paths, etc.).

If either the sdi or poker repositories already existed on the local machine, the script will terminate and ask you to remove them. Assuming that what you actually want to do is update them, and not re-install, then see below.

**Using Git:**

Update local software from GitHub:

In order to update an installation on a local machine, incorporating any new changes that might be in the GitHub repository, do the following (I’ll assume you want to update the core SDI repo):

1. Open git bash (this is a command line, bash-like interface)
2. cd c:/users/sdi3000/sdi (note the forward slashes)
3. git pull

Assuming all went well, this will download any changes to any files, and incorporate them into the local repo.

Update GitHub repo from local software:

If you make changes to a local copy of a repository, you should send those updates back to the GitHub repository so things don’t get out of sync. To do this (again assuming you have made a change to the core SDI software):

1. Open git bash
2. cd c:/users/sdi3000/sdi
3. git push
4. you will need to enter username and password

This will update the online repo with your local changes.

Creating a new GitHub repository:

You might want to do this for example if you write instrument-specific code for a new instrument.

1. Go to <https://github.com/organizations/dopplerimager>
2. On the right there should be a button labeled “New Repository”, click on this
3. Enter a name and optional description, leave everything else as is, click “Create Repository”
4. At this point an empty repository exists on GitHub. You can do one of two things:

If you have a local repository already created for the new code, do this:

1. Open git bash
2. Change to the local repository directory
3. git remote add origin <https://github.com/dopplerimager/NewRepoName>
4. git push

(Step 3 sets up the local repo to track the one on GitHub. Step 4 then uploads your local code to GitHub.)

If you don’t have a local repository, do this:

1. Open git bash
2. Change to the directory where you want the new repo directory to be copied to
3. git clone <https://github.com/dopplerimager/NewRepoName>
4. cd NewRepoName
5. You can then start adding files to the repo using, e.g.:
6. git add newcode.pro
7. git commit –am “Added awesome new code”
8. git push (update the online repo).

Creating a new Local repository:

To create a new repository on the local machine, just create a new directory, then:

1. Open git bash
2. Change to the new directory (cd path/to/dir)
3. git init
4. You now have an empty repository. You add files to track using:
5. git add dir/filename (or git add dir/\*.extension)
6. git commit –am “Commit message”

Step 6 is important: most git commands do not directly affect the current state of the repository, they just “stage” these changes, which means they are put in a queue to be carried out the next time you type git commit –am “Message” (the –a means commit all staged changes, it is what I usually use).

**Software Startup sequence:**

**sdi\_main**

The IDL entry point is sdi\_main in sdi\_main.pro.

Keyword arguments to sdi\_main:

settings = (required) filename of an SDI settings file

schedule = (required if mode is auto) filename of a schedule file

mode = (optional – manual by default) ‘manual’ or ‘auto’

There are usually scripts set up for each instrument to call this function through an IDL icon or similar, e.g.

**AFA\_Auto\_SDI\_Operation.pro**

sdi\_main, settings="C:\Users\sdi3000\setup\AFA\_setup.sdi",

schedule="C:\Users\sdi3000\setup\AFA\_Schedule.txt", mode="auto"

**AFA\_Manual\_SDI\_Operation.pro**

sdi\_main, settings="C:\Users\sdi3000\setup\AFA\_setup.sdi",

schedule="C:\Users\sdi3000\setup\AFA\_Schedule.txt", mode="manual"

The primary job of sdi\_main is to create the IDL object ‘XDIConsole’. On creation, this object starts xmanager, which takes over control and waits for events. sdi\_main.pro also containes the top-level event handlers Handle\_Event and Kill\_Entry (for object destruction). Calls to these functions are re-routed back to methods in the XDIConsole object (these methods are Event\_Handler and Kill\_Handler respectively).

**XDIConsole**

Starts up in the Init method, which takes the settings, schedule and mode arguments from sdi\_main.

Init Sequence:

1. Locate plugins by searching through IDL search path for files of the form ‘SDI\*\_\_define’.
2. Create the SDI console GUI and create a menu containing the plugins which were found.
3. Create a top-level timer widget which is used to drive events.
4. Create XDIWidgetReg object, which is responsible for managing opened plugins (various utilities for finding them by name etc).
5. Load the settings file (this is implemented in the method load\_settings).
6. Check that the settings file loaded correctly, if not, and we are running in manual mode, prompt for a new file, else die.
7. Load the console settings file – each plugin-type object stores things like geometry in a settings file. Not to be confused with ‘settings file’ which is required to passed as argument to sdi\_main.
8. Compile the instrument-specific settings file.
9. Run the XXX\_intialise method in the instrument-specific settings file, where the XXX is the instrument\_name field in the main settings file, in the header structure.
10. Initialise the camera. This should eventually be ported into the instrument-specific file, but since all instruments do the same thing currently, this hasn’t been done yet.
11. After initializing, we then start camera acquisition. Frames are grabbed in the timer\_event method.
12. Read the position of the mirror motor using the instrument-specific file.
13. Set the filter position to be whatever was last stored in the settings file.
14. Register to receive timer events.
15. Compile found plugins (this seems to be necessary).
16. Start the top-level timer going.
17. Start xmanager.

**Event Handling:**

Events are intercepted first by Handle\_Event in sdi\_main.pro, but are immediately re-routed to Event\_Handler in XDIConsole.

In Event\_Handler (XDIConsole::Event\_Handler), events are separated into timer events generated by the console gui and events which will be re-routed to plugins (including the console). Timer events are sent on to plugins which have registered to receive them (including the console).

The console handles timer events in XDIConsole::timer\_event, and uses them to drive things like camera frame grabbing, crash testing, calculating solar elevation angle. Once frames are acquired they are passed onto plugins which have registered to receive frame events (plugins indicate the need for frame or timer events by setting inherited member variables self.need\_timer = 1, self.need\_frame = 1 in their init methods). These fields are inherited from a class called XDI\_Base (XDIBase\_\_define.pro) and do not appear explicitly in a plugins structure definition. All plugins need to inherit from XDI\_Base.

**Schedule Execution:**

When the console decides it needs to execute a new schedule instruction, it calls XDIConsole::execute\_schedule. Current schedule information is stored in console member variables self.runtime.schedule and self.misc.schedule\_line. It first checks to see if the phasemap or steps/order need refreshing. It then calls the function schedule\_reader (schedule\_reader.pro), passing it the current schedule file line number (the line number of the last executed schedule command).

This function looks in the schedule file, beginning at the passed-in line number, and gives back the next schedule command and arguments based on the need to refresh phasemap steps/order, and the site latitude and longitude (to get solar elevation angle). It gets a reference to the console so it can retrieve the snr/scan. The rest of XDIConsole::execute\_schedule executes actions depending on the returned command string. Currently implemented commands are:

* phasemapper
* stepsperorder
* spectrum
* cameraset (set camera exposure time and gain)
* runscript (execute an idl string)
* mirror (drive the mirror)
* cal\_switch (select calibration source)
* filter (select filter)
* wait (execute IDL wait function)
* log (write a string to the console log)

In general, **the schedule file should not be changed while the SDI is running from it**. Problems arise due to mismatched line numbers etc, so if you want to update the schedule file, you should first change the SDI mode back to ‘manual’, edit and save the schedule file, then switch the mode back to ‘auto’. The console will then start reading from the start of the schedule file again, and it should all work OK.

When the console determines that it needs to refresh the phase map or steps/order value based on these fields in the settings file:

etalon.phasemap\_refresh\_hours

etalon.nm\_per\_step\_refresh\_hours

it asks the schedule\_reader to look in the schedule file to see if any commands of the form:

%% stepsperorder: [632.8, 660, 730, 30, 4, 50, 0.18]

&& phasemapper: [0, 1, 632.8, 632.8, 50, 0.18, 3]

are present. These commands are the corresponding refresh commands that will be run when the console determines its phase map or steps/order are out-of-date. Unfortunately you have to look into the plugins themselves to see what these arguments represent (look in the auto\_start method), or at the top of many schedule files the arguments are listed. A template schedule file (with these arguments spelled out) is in the idl/ sub-directory.

**Adding new scheduled commands:**

If you need to implement new schedule file commands, you want to add code to the XDIConsole::execute\_schedule method. As an example, here is the filter command, used to select a new filter:

if command eq 'filter' then begin

filter\_number = fix(args(0))

current\_filter = self.misc.current\_filter

log\_path = self.logging.log\_directory

call\_procedure, self.header.instrument\_name + '\_filter', $

filter\_number, log\_path = log\_path, self.misc, self

self.misc.current\_filter = filter\_number

self -> save\_current\_settings

self -> log, 'Selected Filter ' + string(filter\_number, $

f='(i0)'), 'Console', /display

endif

The command will be a string with spaces removed, and **remember that each argument returned by the schedule reader is a string**, so in the example above, the args[] array is a string array, and since the filter number is an integer, it needs the fix(args[0]) to get a number.

**Plugin Startup:**

Handled by XDIConsole::start\_plugin. Plugins can be started either by clicking in the drop-down menu from the console gui, or through a schedule file command, in which case the plugin is being ‘auto-started’ (each plugin needs an auto\_start method to handle this). The first part of start\_plugin determines which of these two scenarios apply. It then has a special case for if the plugin is a spectrum plugin and is not being auto-started, in which case it asks for a wavelength, since this is required in order to actually create this particular plugin.

It then does the following:

1. Build a structure containing some info about the current execution environment, and some relevant variables, which gets passed to every plugin for initialization.
2. Check if saved settings exist for the plugin, if they do then restore them, the restored data is in a structure called restore\_struc.
3. Increase the object count (object count is used to provide unique id’s for plugins).
4. Create the new object instance.
5. Check to see what timers the created plugin needs, and register with the manager object.
6. Clear any frames accumulated during this time.

**Plugins:**

A plugin template is located in the idl/ sub-directory (Template\_Plugin.txt). Copy this and rename to SDIMypluginname\_\_define.pro in order to use.

Plugins are IDL objects. In order for them to work with the SDI, they must inherit from XDIBase, which defines things like geometry, some handles to the console and widget manager objects, etc. Plugins also need to have a variable called id in their structure definitions – this is used to hold the widget id of the plugin’s main window (I am not sure why this was never put into XDIBase).

Inside the Init method of a plugin, the plugin can tell the console that it wants to receive timer events, or frame (new camera image) events, or both. It does by first setting the following flags:

self.need\_frame = 1

self.need\_timer = 1

And by returning these fields in its ::get\_settings method (see below). When either of these fields are set to 1, the plugin also needs to define the corresponding methods. These methods are:

pro PluginName::frame\_event, image, $ ;\\ latest camera image

channel ;\\ current scan channel

end

pro PluginName::timer\_event ;\\ no arguments

end

The console will call these events, depending on which of the two flags have been set, when a timer event is generated or when a new camera image is received.

The plugin also needs to define a method to fill up a structure with settings that it wants to save, in order to restore them when it is next instantiated. The method looks like this:

function SDIVidshow::get\_settings

struc = {id:self.id, $

need\_frame:self.need\_frame, $

need\_timer:self.need\_timer, $

geometry:self.geometry, $

scale:self.scale, $

scale\_fac: self.scale\_fac, $

exp\_time:self.exp\_time, $

crosshairs:self.crosshairs, crosshairs\_point:self.crosshairs\_point, $

grid:self.grid}

return, struc

end

This example is from the Vidshow plugin, each of the fields in the struc are fields from the plugins own class structure which it wants to restore the next time it is started up. **The fields in red should be present for every plugin**. A plugin uses these restored settings inside its Init method. The structure from get\_settings is passed back to the plugin’s init method as a keyword restore\_struc, and a flag is set inside the data structure, which is also passed to init via a keyword. For example, from Vidshow:

function SDIVidshow::init, restore\_struc=restore\_struc, $ ;\\ Restored settings

data=data ;\\ Misc data

self.need\_timer = 0

self.need\_frame = 1

self.manager = data.manager

self.console = data.console

self.palette = data.palette

self.obj\_num = string(data.count, format = '(i0)')

self.xdim = data.xdim

self.ydim = data.ydim

if data.recover eq 1 then begin

;\\ Saved settings

xsize = data.xdim

ysize = data.ydim

xoffset = restore\_struc.geometry.xoffset

yoffset = restore\_struc.geometry.yoffset

self.scale = restore\_struc.scale

self.scale\_fac = restore\_struc.scale\_fac

self.grid = restore\_struc.grid

self.crosshairs = restore\_struc.crosshairs

self.crosshairs\_point = restore\_struc.crosshairs\_point

endif else begin

;\\ Default settings

xsize = data.xdim

ysize = data.ydim

xoffset = 100

yoffset = 100

self.scale\_fac = 0.005

endelse

;\\ other stuff here….

end

The restoration code above is shown in blue.

**Adding fields to the settings file:**

The settings file contains a set of structures (etalon, camera, header, logging, misc) plus a structure defining the com ports for different pieces of hardware. When adding or removing fields from these structures, note that the definitions actually occur in two places and need to be identical: they occur in XDIConsole\_\_define.pro (down the bottom, in the XDIConsole\_\_define method) and edit\_console\_settings.pro. If you update one, don’t forget to update the other or problems will ensue. Each of the above structures contains a field called editable, which is a vector containing the indices of all fields which are meant to be edited by the user. Be sure to update this field if you add to one of the structures and you want that field to be editable. It is easier to add fields at the end of the structure (but before the editable field) so that you don’t need to adjust all the indices. Also note that any default values placed into the definitions inside XDIConsole\_\_define.pro will **not be preserved** – these definitions occur inside a class definition, and don’t mean anything, all types will get their IDL-default initializers (at least this is how IDL 6.2 worked).

Adding a new field should be easy as adding it into one of the existing structures in both edit\_console\_settings.pro and xdiconsole\_\_define.pro (I just tried it and it worked OK, however you may need to do a .reset\_session in order to clear any previous definition of the structure).

If, for example, you add a new field to misc (in edit\_console\_settings), then compile and run edit\_console\_settings, assuming you made the field editable, it should appear in the tree of fields. If you then load a settings file which does not define that field, it will still load, but that field will not be updated with new information (since none was defined in the file).

**Instrument Specific Files:**

The settings file contains a field in the header structure called instrument\_name, which should be a string name without spaces. **The name in this field is important because it determines where calls to certain instrument/hardware specific functions are directed**. I’ll use the Poker Flat instrument as an example. In the settings file for this instrument, header.instrument\_name = “PokerFlat”. There is a corresponding file called PokerFlat\_initialise.pro, which contains a set of routines whose names begin with PokerFlat\_. Each instrument has a file like this, and the following procedures need to be defined within it (again using Poker Flat as an example):

;\\ Called on shutdown, close ports etc. here.

PokerFlat\_cleanup, misc, $

console

;\\ Called when we eant to change the calibration source.

PokerFlat\_switch, source, $

misc, $

console

;\\ Called when we want to change the filter.

PokerFlat\_filter, filter\_number, $

misc, $

console, $

log\_path=log\_path

;\\ Called to update etalon plate separation.

PokerFlat\_etalon, dll, $

leg1\_voltage, $

leg2\_voltage, $

leg3\_voltage, $

misc, $

console

;\\ Called every time an image is acquired form the camera.

;\\ Do background subtraction etc. here.

PokerFlat\_imageprocess, image

;\\ Called on startup, open com ports and stuff here.

PokerFlat\_initialise, misc, $

console

Note that PokerFlat\_initialise is declared last for compilation reasons, so stick with this layout. Also, the argument lists are not very consistent between the different procedures, and some are redundant, but it has evolved this way ☺. In each case, the misc argument contains the misc data structure from the settings file, while the console argument is the object reference of the console, allowing the procedures to call any of the methods defined in the console. Other arguments are fairly self-explanatory. There is a template instrument-specific file in the idl/ sub-directory called default\_initialise.pro.