
ePS Metrix 22.1

Installation Guide



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 Productivity Suite | Installation Guide

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Table of Contents

Welcome to Metrix 22.1	4
About this Guide	4
Metrix 22.1	4
Contact Information	5
Metrix Base – Key Features.....	6
Auto Plan Module	7
Capacity Plus Module	7
N-Up Binding Module	7
Automation Pro / Automation Lite Modules	7
Non-rectangular Shapes Module	7
Platform and Licensing.....	8
License Types	8
Metrix Multi-User Deployment	8
eFlow License Manager	8
Install the eFlow License Manager	9
Installing Metrix	19
Windows installation.....	19
Mac OS installation	24
Launch Metrix and Initial Setup	30
Upgrading Metrix.....	32
(1) Shut Down the Data Server and the License Server.....	32
(2) Back up your Metrix 21.2 (and earlier) files and folders.....	32
(3) Uninstall Metrix	32
Installing Metrix Automation Server (AS).....	33
Configuring Metrix Automation Server as a Service	36
Upgrading Metrix Automation Server	38
(1) Shut Down Metrix Automation Server	38
(2) Back up your Metrix Automation Server 21.2 (and earlier) metrix.properties file	38
(3) Uninstall Metrix Automation Server	38
(4) Install Metrix Automation Server	38
Appendix A: Where Metrix Files Are Installed in Windows	38

Welcome to Metrix 22.1

ePS Metrix is an industry-leading job planning engine that transforms big data into actionable data in the most proven end-to-end integrated solution with a holistic view into manufacturing. With over 1,200 Metrix users in 25 countries and 17 years of continuous, aggressive development, Metrix is recognized as the de facto industry standard for dynamic, intelligent production planning, and automated imposition.

The Complete Planning and Imposition Solution

The ePS Metrix solution stores your presses, finishing equipment, stock, folds, users' logins and permissions, along with your manufacturing standards. Centralizing this information ensures uniformity, efficiency, and ultimately error-free planning and imposition across your entire organization. The ePS Metrix solution automatically and dynamically determines how many press sheets you need, the optimum layout for each press sheet, and even figures out for you the most cost-effective printing method, press, and sheet size.

About this Guide

Metrix comes in four major versions: **Standalone**, **Commercial-Suite-Integrated (Monarch)**, **Packaging-Suite-Integrated (Radius)**, and **Midmarket-Suite-Integrated (Pace)**. This guide covers the first two only. If you have one of the other versions of this product, please see the documentation for your version of the product.

After you install Metrix, please consult the *ePS Metrix User Guide* for information on using the software.

Notes Request these documents from Metrix Sales or Support (contact information is on page [5](#)).

Metrix 22.1

Metrix Base may include any of the following modules:

- Auto Plan (optional)
 - Capacity Plus (optional)
 - N-Up Binding (optional)
 - Barcodes (included)
 - Automation Pro (optional)
 - Automation Lite (optional)
 - Content Previews (included)
 - Irregular Shapes (optional)
 - Media Optimization (included)
 - Display Graphics (included)
-

Contact Information

ePS Support

Web Site:	communities.efi.com
US Phone:	1.855.EFI.4HLP (1.855.334.4457)
UK Phone:	+44 (0) 800.783.2737
EU Phone:	+49.2102.745.4500
E-Mail:	metrix.support@efi.com

Metrix Support hours are 8AM CET to 5pm ET Monday – Friday. You may contact support at the above numbers or via our customer portal at communities.efi.com.

Note For problems involving infrastructure (e.g., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. ePS cannot support these types of issues.

ePS Professional Services

US Phone:	(651) 365-5321
US Fax:	(651) 365-5334
E-Mail:	ProfessionalServicesOperations@efi.com

Note ePS Professional Services can help you perform ePS software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your ePS software plus offer a range of training options.

Metrix Base – Key Features

- **Maximum sheet dimension (W and H):** 984.25" (25,000mm)
- **Maximum products handled by Auto Layout:** 16
- **Maximum products per project:** 100

Feature	Included or optional
Plans/imposes flat, folded, bound, and die-cut jobs	Included
Automatically determines the most cost-effective Production Method, Press, and Sheet Size (Auto Production)	Included
Automatically matches new layouts to saved profiles (Standards)	Included
User Permissions, Logins, and Passwords	Included
Handles chop cuts automatically (Auto Bleed)	Included
Prints reports	Included
Imports JDF	Included
Imports Metrix XML and CSV data	Included
Exports Imposed PDF	Included
Exports Metrix XML	Included
Exports JDF Imposition/JDF Stripping	Included
Exports JDF/CIP 3 Cutting data	Included
Exports JDF/CIP Folding data	Included
Exports JDF Binding data	Included
Site Licenses	Included
JDF Color Mapping	Included
Roll-fed presses	Included
Stock support	Included
Run List	Included
Auto Expand/Contract Trims	Included
Super Wide Format	Included
Media Optimization module	Included
Display Graphics module	Included
Content Previews	Included
Barcodes module	Included
Auto Plan module	Optional
Capacity Plus module	Optional
N-Up Binding module	Optional
Automation Pro module	Optional
Automation Lite module	Optional
Irregular Shapes module	Optional

Auto Plan Module

- Automatically and dynamically determines how many layouts are required for the products in the project.
- Plans and simultaneously imposes across multiple press sheets and even multiple presses.
- Uses real costing data from the Metrix database.
- Applies standards where appropriate.
- Uses proprietary and sophisticated algorithms to consider dozens, hundreds, or even thousands of options to find the most cost-effective project solution.

Capacity Plus Module

- Allows for projects of greater complexity – more products for Auto Layout and Auto Production calculations and more products per project.
- Up to 2,000 products allowed per project, regardless of the number of press sheets.
- Up to 200 products allowed for Auto Production and Auto Layout calculations.

N-Up Binding Module

- Automates setup of products that print, fold, and bind 2- or 3-up on a press sheet.
- Provides visual feedback on how the project will fit on a press sheet with the new manufacturing configuration.

Note Metrix compensates for shingling/creep.

Automation Pro / Automation Lite Modules

Automation Pro and Automation Lite are advanced hot-folder driven modules for Metrix that accept MXML, CSV, JDF Stripping, or JDF Intent files and fully automate their processing in Metrix. “Automation mode” (available in the File menu) switches Metrix to the Automation User Interface that enables many projects to flow through Metrix with no operator involvement.

- When MXML files arrive in the Automation Hot Folder, the system:
 - Creates a Metrix project.
 - Applies settings.
 - Performs tasks.
 - Exports output files (JDF, PDF, etc.) automatically.
- Commands can come from two places:
 - Loaded from one of several Commands files.
 - Embedded in the incoming MXML data (Pro only).

Note Automation Lite functions like Automation Pro with two differences:
 (1) Automation Lite does not allow you to embed scripting commands in incoming MXML files.
 (2) There is no requirement to maintain a Maintenance Service Agreement (MSA).

Non-rectangular Shapes Module

- Ability to nest non-rectangular shapes without needing a die-cutting tool or multi-up die standard.
- Die-cutting tools and multi-up die standards use the geometry of customer-supplied multi-up dies.
- Plans projects that contain a mix of die-cut and other types of products.

Note Metrix plans die-cut products to a separate layout from other types of products.

Platform and Licensing

Metrix features and functionality are identical on Windows and Mac OS. You can mix and match in a multi-user environment. eFlow licensing works on either platform.

License Types

Metrix 22.1 uses eFlow License Manager, a web-based license server that replaces dongle-based licensing. The two license types are:

- **Concurrent User License:** This replaces the Network License, which allowed multiple installations of Metrix to use the same License Server and dongle. The Concurrent User License is managed by eFlow and can be shared by multiple users who can also share the same database via the Database Server.
- **Single User License:** This replaces the Local Machine License, which applies to only one installation of Metrix. The Single User License is also managed by eFlow. It can be used by only one installation of Metrix at a time and requires using an embedded database.

Metrix Multi-User Deployment

Multiple instances of Metrix on Windows and/or Mac OS can share a single eFlow license key via the eFlow License Manager, which serves the license to Metrix clients on the network.

This installation is called Concurrent User Licensed Metrix. The Metrix Data Server can be either on the same computer as the eFlow License Manager or on a different one.

Note Metrix clients are full installations of the software, where the processing occurs locally, that share data through the Metrix Data Server.

eFlow License Manager

Important Metrix 22.1 requires eFlow LIM version 10.0.10056.39 or newer. This version is compatible with Mac OS 12 and Windows 11. The installers and documentation can be downloaded from <https://www.efi.com/marketing/productivity-software/downloads/metrix-installers/>.

About the eFlow License Manager

ePS eFlow License Manager (LIM) is used for licensing ePS components. This is for components that do not need the full capabilities of the main eFlow product.

After you install the eFlow LIM, you can then apply the license for your ePS component using a license key. The installation and licensing process requires an Internet connection.

Notes If do not have an Internet connection on the machine where you are applying the license, you can request a license file from ePS.

If you need to transfer the license to a separate machine after it has already been applied, contact ePS Support.

If you need to transfer the eFlow LIM to another server, contact ePS Support as you will not be able to reactivate the license for Metrix using the same activation code.

Licensing Metrix

Only ePS Metrix can be licensed using the eFlow LIM.

The eFlow LIM permits you to install Metrix on any number of computers because the License Server controls the number of concurrent users running Metrix at any one time.

Metrix uses three main programs when running this way:

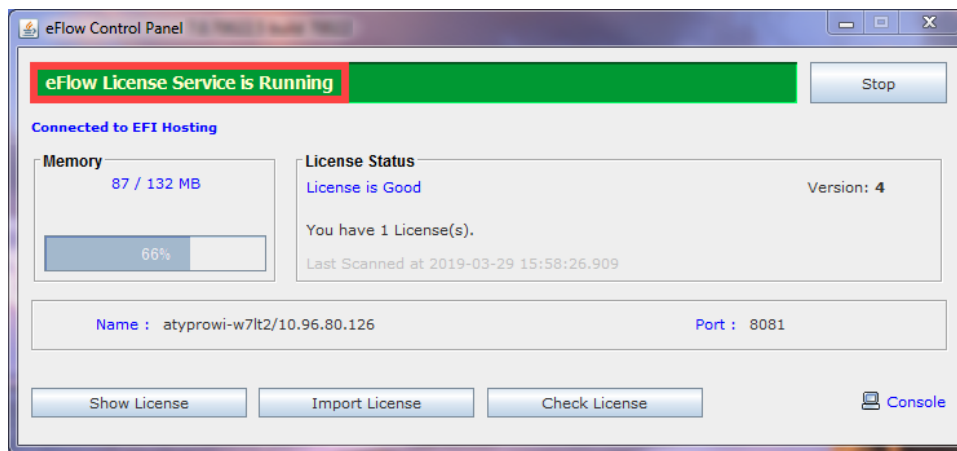
- **eFlow License Manager:** The program that controls the number of Metrix clients that can run at any one time. eFlow LIM requires a license key to run and must have a static IP address.
- **Metrix Data Server:** Metrix clients communicate with this program to access the database. The Data Server must have a static IP address so the Metrix clients can access the shared database.
- **Metrix:** The full install of Metrix on any number of computers within a single physical site that have network access to the eFlow License Server and the Metrix Data Server. Metrix client installations must also have the eFlow License Key to run.

Note You can install eFlow LIM on the same machine as the Metrix Automation Server.

About Services

When eFlow LIM is installed, the *EPSI eFlow Service* is installed. This service must be left running for your license to be active and validated.

You can verify that the service is running in the **eFlow Control Panel**.

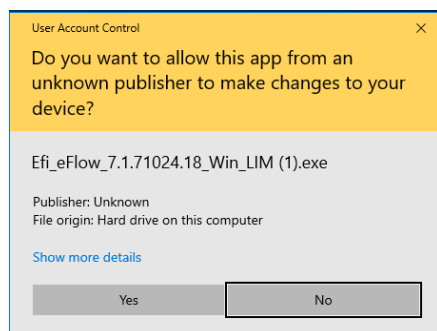


Install the eFlow License Manager

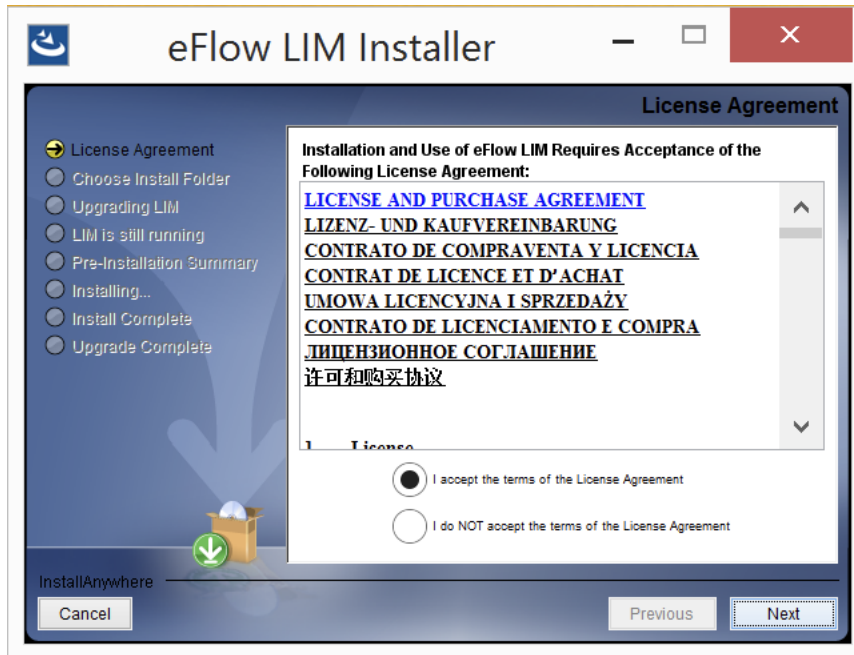
Note You must install and run the eFlow License Manager prior to starting Metrix.

Windows Installation:

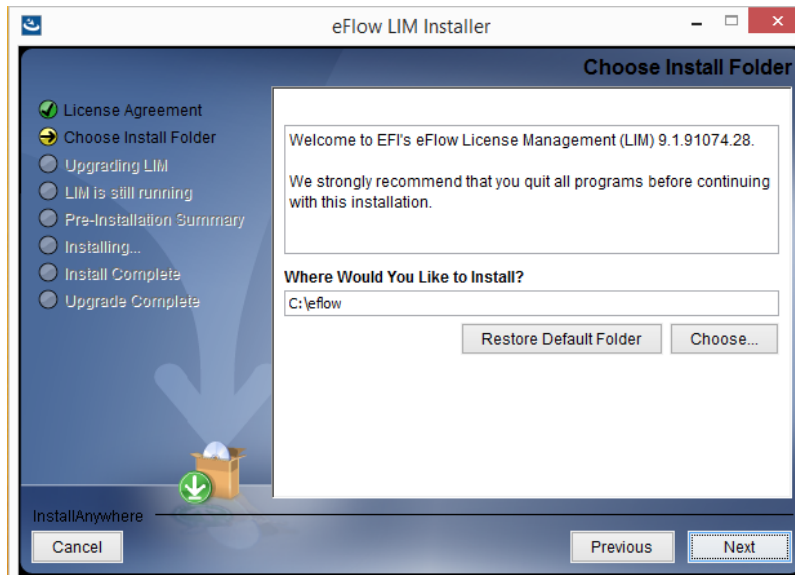
1. Close all open programs.
2. Click the **Efi_eFlow_(Version)_Win_LIM.exe** file to launch the installer.
3. If the User Account Control window appears, click **Yes** to continue.



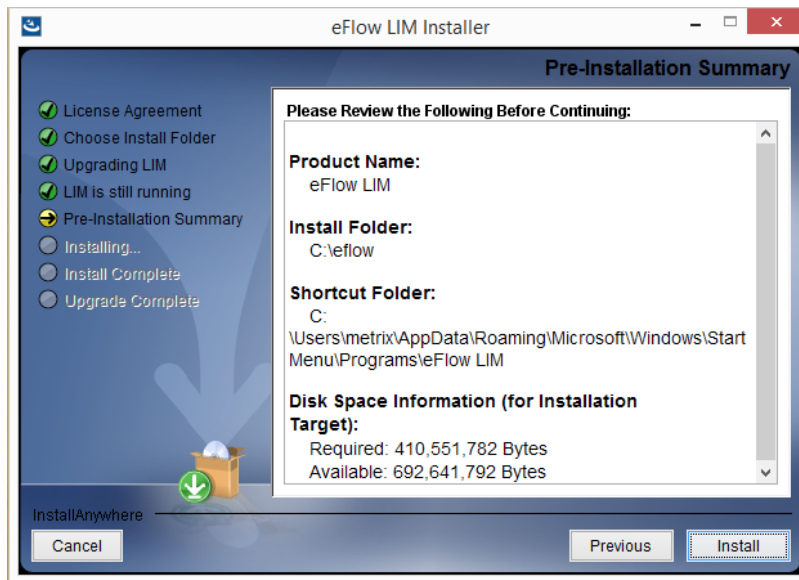
4. Click the **I agree** radio button to accept the license agreement, and then click **Next**.



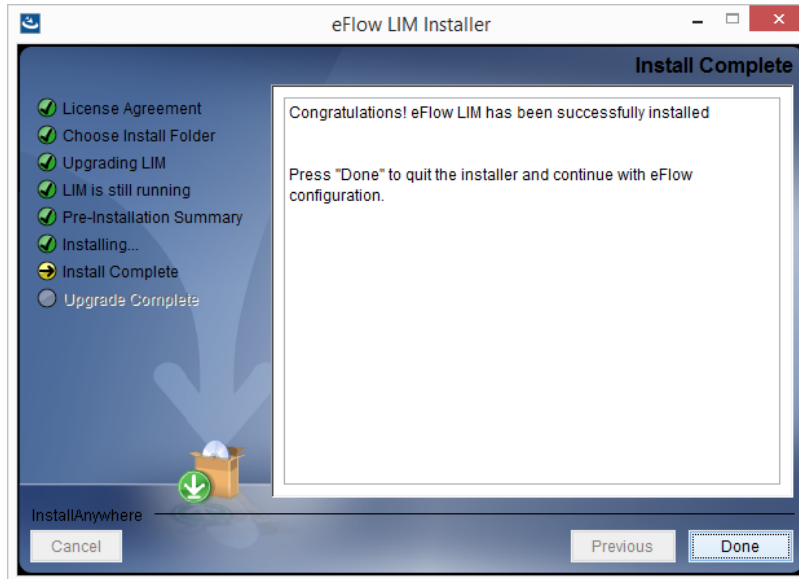
5. Accept the default location of **C:\eflow**, or select a different location, and then click **Next**.



6. Click **Install** in the Pre-Installation Summary window.

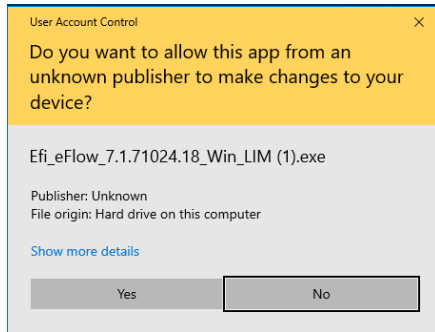


7. When the installation is complete, click **Done** to exit the installer.

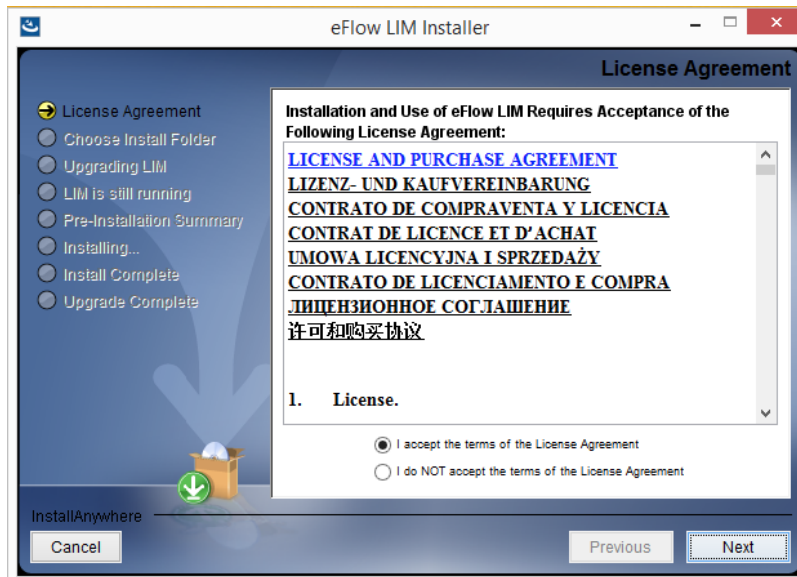


Windows Upgrade:

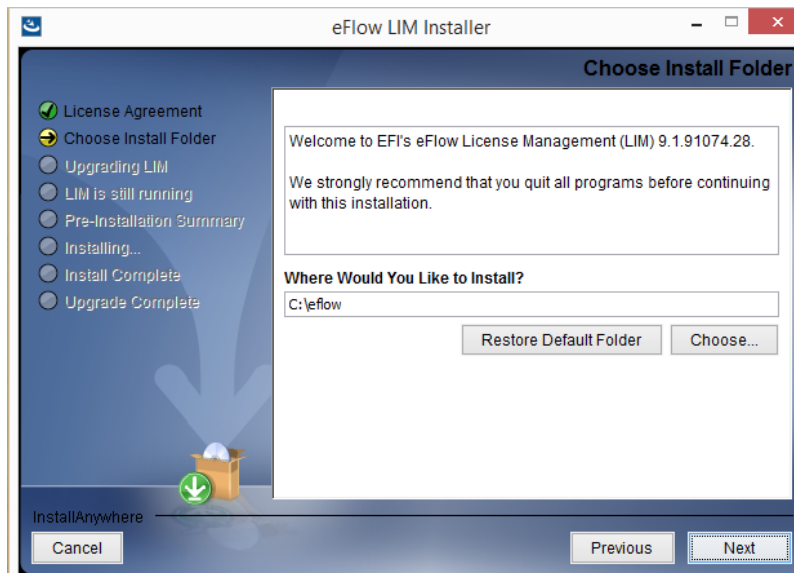
1. Close all open programs.
2. Close the Control Panel but do not stop the eFlow service.
3. Click the **Efi_eFlow_(Version)_Win_LIM.exe** file to launch the installer.
4. If the User Account Control window appears, click **Yes** to continue.



5. Click the **I agree** radio button to accept the license agreement, and then click **Next**.

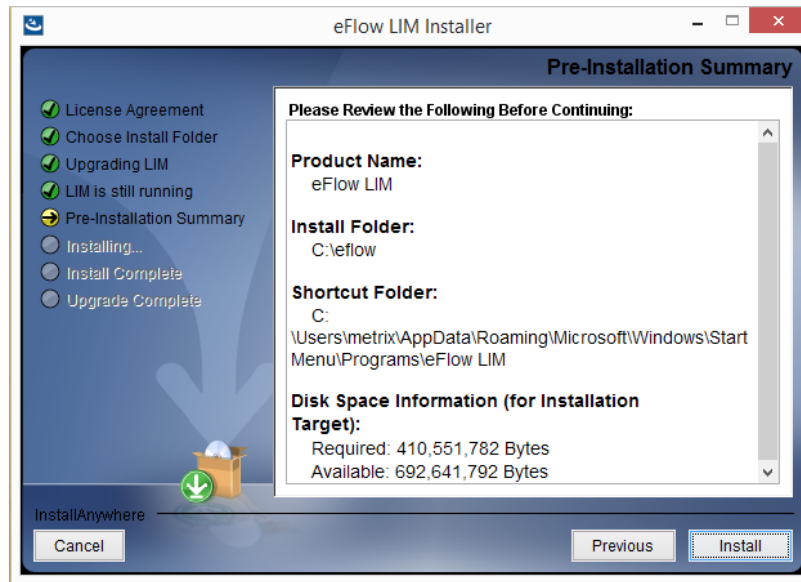


6. Accept the default location of **C:\eflow**, or select a different location, and then click **Next**.

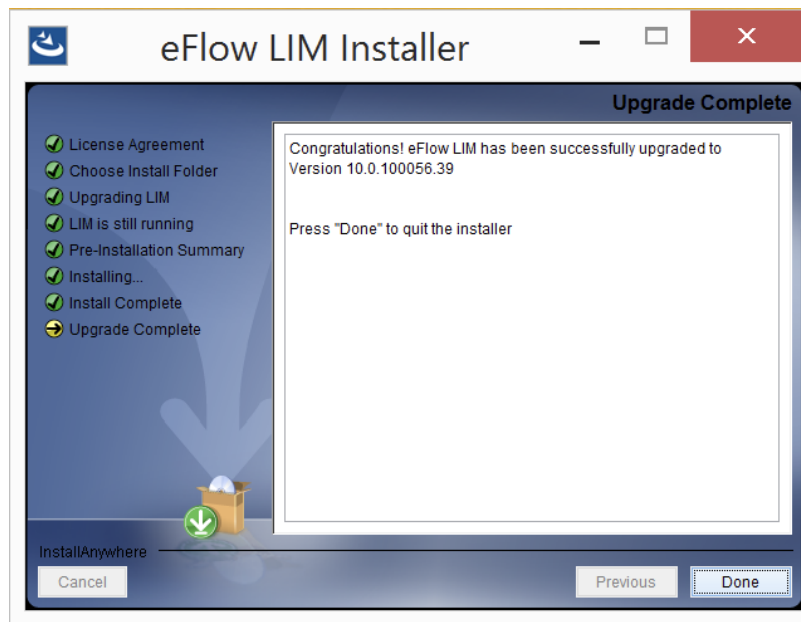


- a. If the eFlow LIM control panel is open, the "LIM is still running" window will prompt you to close the program.

7. Click **Install** in the Pre-Installation Summary window.

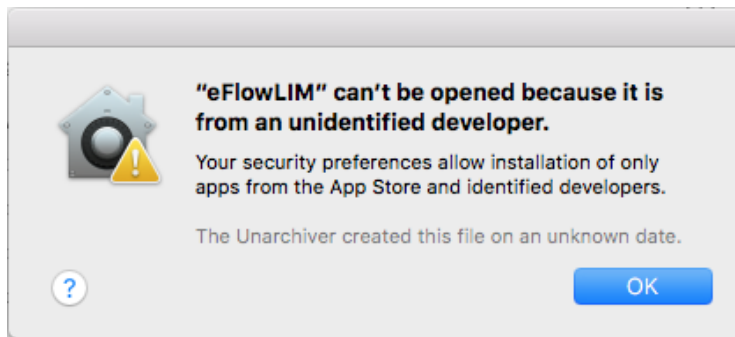


8. When the upgrade is complete, click **Done** in the Upgrade Complete window and restart your computer.

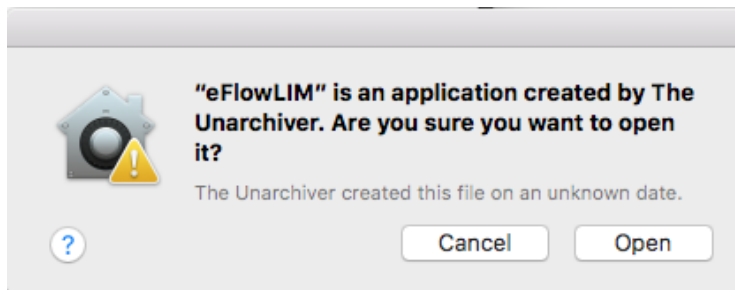


Mac OS Installation:

1. If you are installing eFlow LIM on Mac OS X 10.15 (Catalina), Mac OS 11 (Big Sur), or Mac OS 12 (Monterey), then do the following before continuing to step 2.
 - Note** If you are installing eFlow LIM on Mac OS X 10.14 (Mojave) or earlier, then start on step 2.
 - a. Download [EFI eFlow_\(Version\)_Mac_LIM.zip \(Mac installer\)](#).
 - b. If the eFlow LIM installer does not automatically unzip, then unzip the eFlow LIM installer while it is still in the **Downloads** folder.
 - c. Move the unzipped installer (Efi_eFlow_(Version)_Mac_LIM.dmg) to the desktop.
2. Click the **Efi_eFlow_(Version)_Mac_LIM.dmg** file to launch the installer.
3. If the “**eFlowLIM**” can’t be opened message appears, click **OK**.



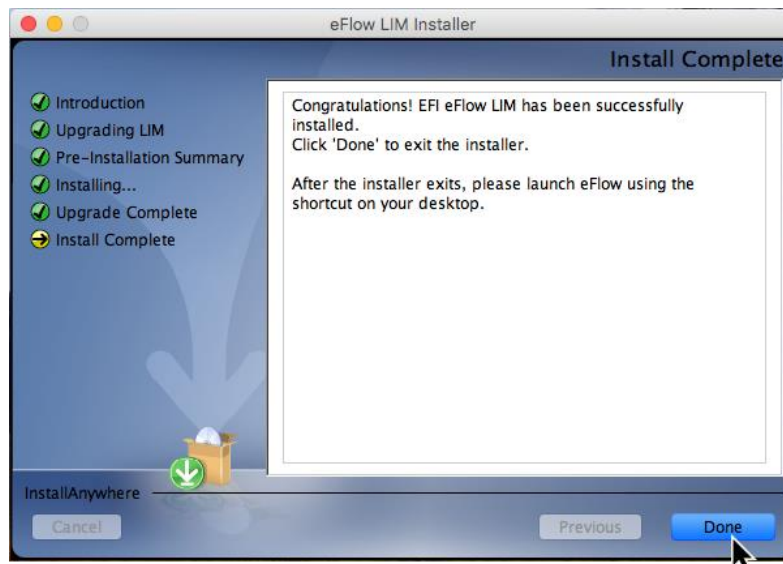
4. Next, right-click, and select **Open** to launch the installer.
5. Click **Open** in the “eFlowLIM” is an application created by The Unarchiver message window.



6. Select the lock in the Authentication window.
-



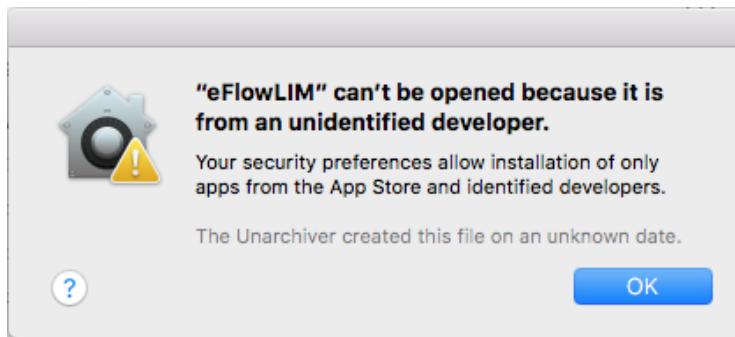
7. Enter your **Username** and **Password**.
8. Close all open programs and select **Next** in the Introduction window.
9. Click **Install** in the Pre-Installation Summary window.
10. When the install is complete, click **Done** to exit the installer.



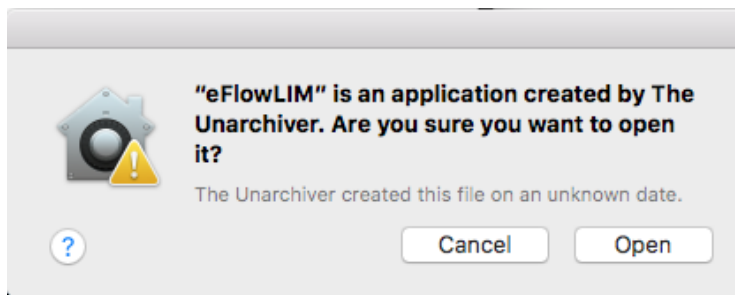
Mac OS Upgrade:

1. Stop the eFlow service and close the eFlow LIM Control Panel.
2. Click the **Efi_eFlow_(Version)_Mac_LIM.dmg** file to launch the installer.

3. If **"eFlowLIM" can't be opened** message appears, click **OK**.



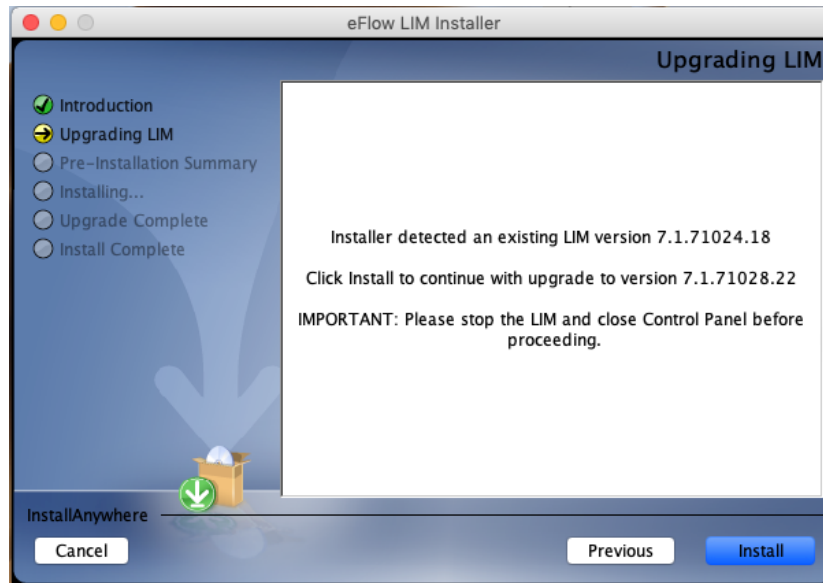
4. Next, right-click, and select **Open** to launch the installer.
5. Click **Open** in the **"eFlowLIM" is an application created by The Unarchiver** message window.



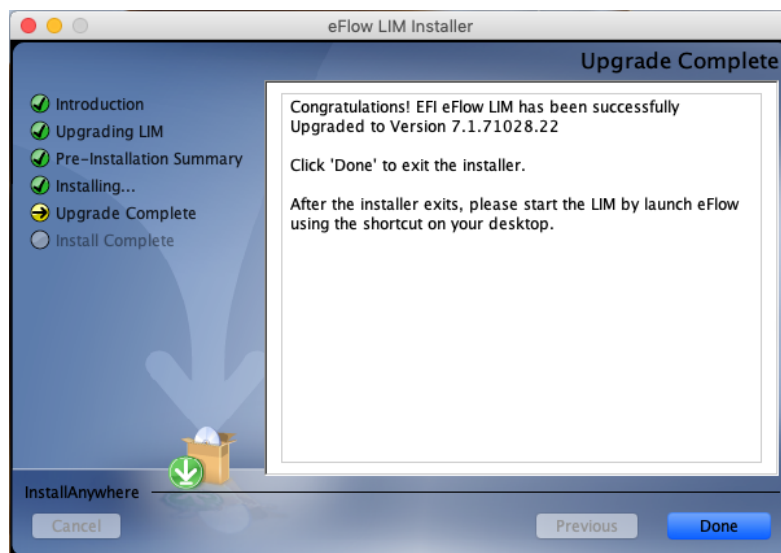
6. Select the lock in the Authentication window.



7. Enter your **Username** and **Password**.
8. Close all open programs and select **Next** in the Introduction window.
9. If you have not already closed the eFlow LIM Control Panel, do so now. Click **Install** in the Upgrading LIM window.



10. When the installation is complete, click **Done** to exit the installer.



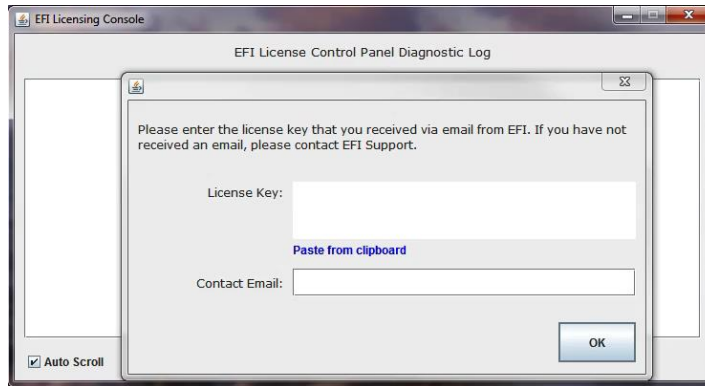
11. Launch the eFlow LIM Control Panel.
12. If the service does not start automatically, click **Start** to start the eFlow service.

Windows and Mac OS X Initial Setup:

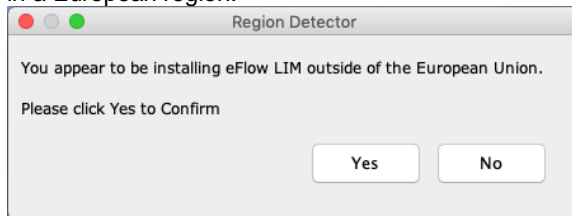
1. Click the **EFI eFlow** icon to launch eFlow License Manager Control Panel.



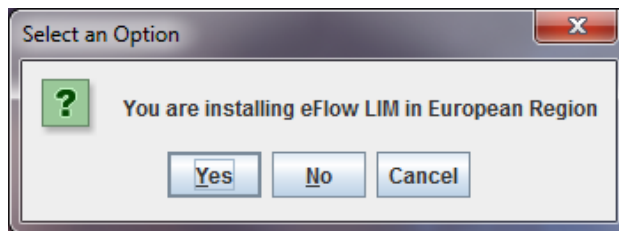
2. Enter the **License Key**, or **eFlow License Key**, and your **Contact Email** address into the appropriate fields.
 - a. Metrix Support will send your **Contact Email** address a notification that includes your **License Key**, or **eFlow License Key**.



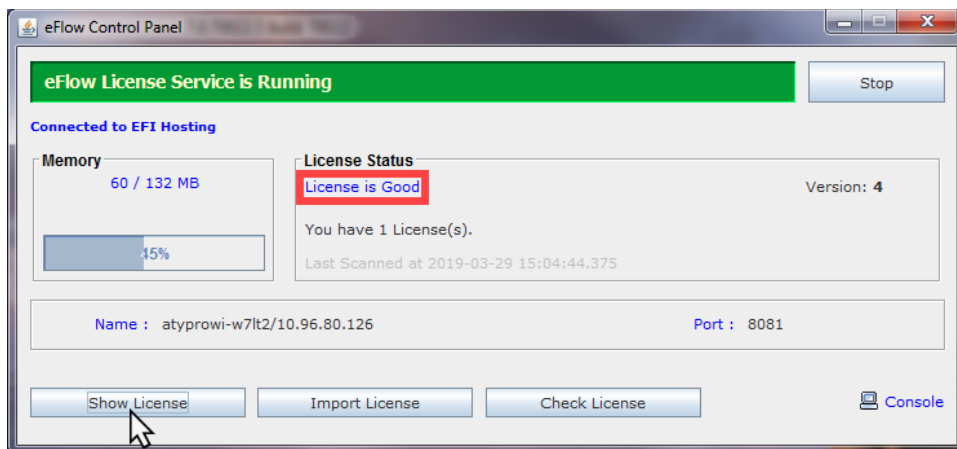
3. In the Region Detector window, select **Yes** if you are in a non-European region, and select **No** if you are in a European region.



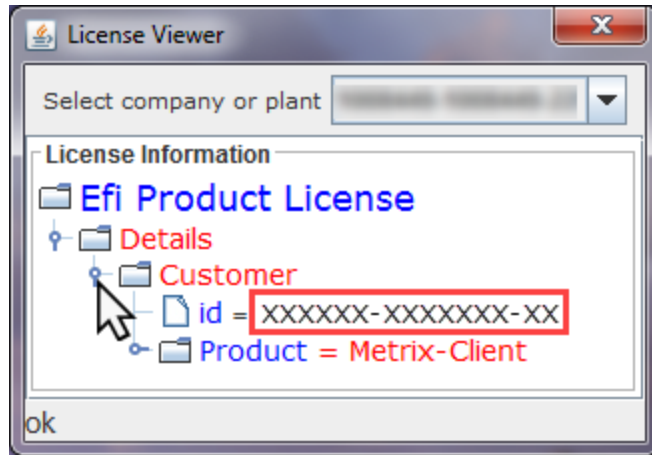
- a. If you select **No**, the Select an Option window will appear. Click **Yes** to confirm you are installing eFlow in a European region.



4. Verify your **License Status** and select **Show License** to open the License Information window.



5. Click the **Customer** folder and copy your **Customer ID** number. After you install Metrix you will need your **Customer ID** number to complete the **Metrix Initial Setup** as described in the section [Launch Metrix](#).



Installing Metrix

Note on Upgrading to Metrix 22.1

Metrix 22.1 is a full install only – there is no updaters. To upgrade, you need to uninstall the previous version of Metrix and then perform a complete reinstallation. For instructions on uninstalling a previous version, please see [Upgrading Metrix](#).

Windows installation

Minimum system requirements on Windows

- **Processor:** Intel compatible
 - Note** Media Optimization module requires a minimum 8-core CPU (recommended 16 core if the Super Wide module is used).
- **Processor Speed:** 1 GHz minimum
- **Operating Systems:**

Metrix 22.1 will install only on 64-bit systems. Supported operating system versions include:

 - Microsoft Windows 11.x (64-bit)
 - Microsoft Windows 10.x (64-bit)
 - Microsoft Windows 8.x (64-bit)
 - Microsoft Windows Server 2019 (64-bit)
 - Microsoft Windows Server 2016 (64-bit)
 - Microsoft Windows Server 2012 R2 (64-bit)
 - Microsoft SQL Server 2014 SP3 and SP4 (64-bit)
 - Microsoft SQL Server 2016, 2017, and 2019
 - Note** Microsoft has ended support for Windows 7 and Windows Server 2008 effective January 14, 2020, so Metrix will no longer support these platforms. We recommend you upgrade your system to Metrix current minimum system requirements.
- **Memory:**
 - Note** Metrix installs with memory requirements set to 4 GB for Metrix client and Data Server. If you need to change this, you can reduce it to 2 GB. For instructions on how to do this, please contact [Metrix Support](#).
 - Metrix client—4 GB RAM

- Metrix Data Server—2 GB RAM
- Metrix Automation Server—8 GB
- Automation Server Pro – 16 GB RAM (Minimum) to 4 GB RAM per CPU Core (64 GB RAM Maximum)
- Automation Server Enterprise – 64 GB RAM (Minimum) to 4 GB RAM per CPU Core (256 GB RAM Maximum)
- Automation Server with Non-Rectangular module—8 GB RAM (Minimum) and 1 Dual-core Processor (Minimum)
- Automation Server with Display Graphics/Media Optimization/Super Wide Format—16 GB RAM (Minimum) (32 GB RAM and 16-core, 32-thread processor or better recommended)
- eFlow License Manager – 256 MB RAM
- **Monitor Resolution:** 1024 X 768 or higher
- **Network (multi-user):** Static IP address for the **Data Server**, **eFlow License Manager**, and **Automation Server**. **Automation Server** runs as a service and needs a local administration account.

Notes If you use the Content Previews module, the minimum RAM requirement for Metrix is 6 GB with 8 GB or more recommended.

The Content Previews module is processor intensive, so a fast multi-core processor is recommended. If PDF content is being accessed across a LAN, gigabit network speeds are recommended when accessing large content files.

Pre-installation checklists

Upgrading to Metrix 22.1 from a previous version

Be sure to save a backup of your Metrix Data and Marks folders, **metrix.properties** file, and Metrix Password file (.mpw, needed only if you are upgrading from Metrix 2016.2 or earlier) so that you can revert to your previous version if necessary.

Warning Users upgrading from Metrix 2016.1 or earlier will be required to back up their database, install 2019.2, and then upgrade the database before they can install 22.1 and upgrade the database again.

Metrix for Windows – Single User License

Before you begin installing Metrix make sure that:

- Your Windows computer meets the minimum system requirements.
- You have your **eFlow License Key** available (Metrix needs this key to run).

Metrix for Windows – Concurrent User License

Before you begin installing Metrix make sure that:

- Your Windows computer meets the minimum system requirements.
- The ports required for Metrix to communicate are open (see below).
- A static IP address is assigned to the computer(s) on which the **eFlow License Manager** and **Data Server** reside.
- You have your **eFlow License Key** available (Metrix needs this key to run).

Windows communication ports

For any multi-user installation of Metrix, the following ports must be open:

Data Server: 9939

eFlow License Manager: 8081

SQL Server: 1433

PostgreSQL Server: 5432

Installing Metrix on the Windows platform

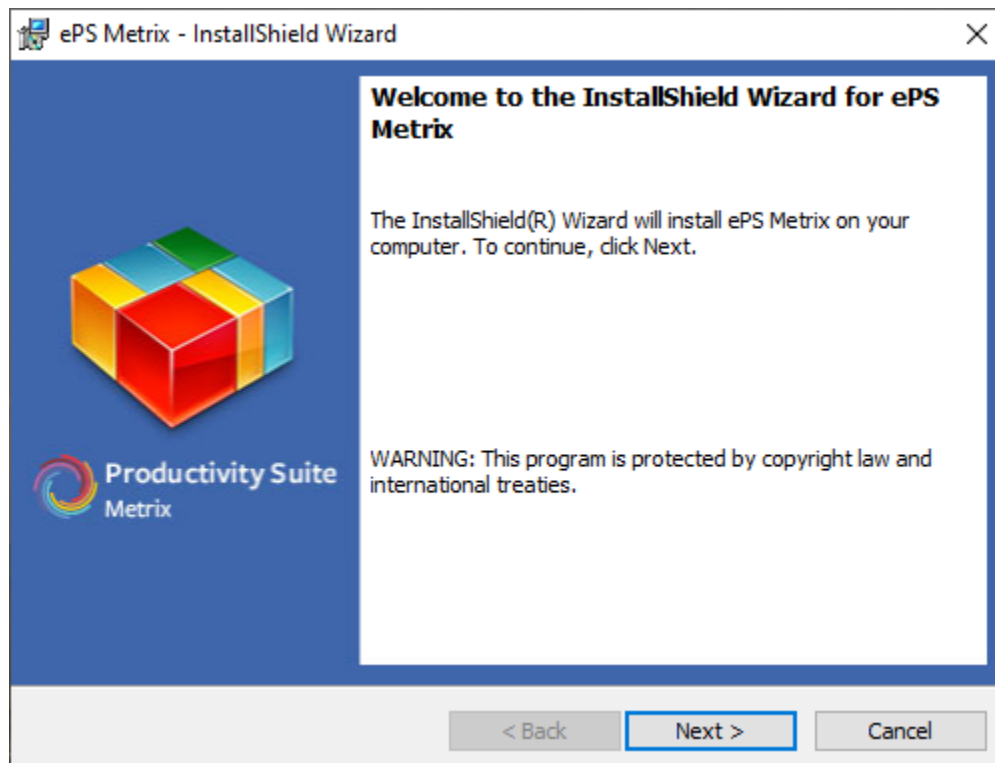
Before installing, close all applications and restart your computer to clear any files from memory.

Important You must have Administrator privileges to install Metrix.

1. Copy the **ePS Metrix Installer.exe** file to your computer. Exact file names will vary based on the build number.

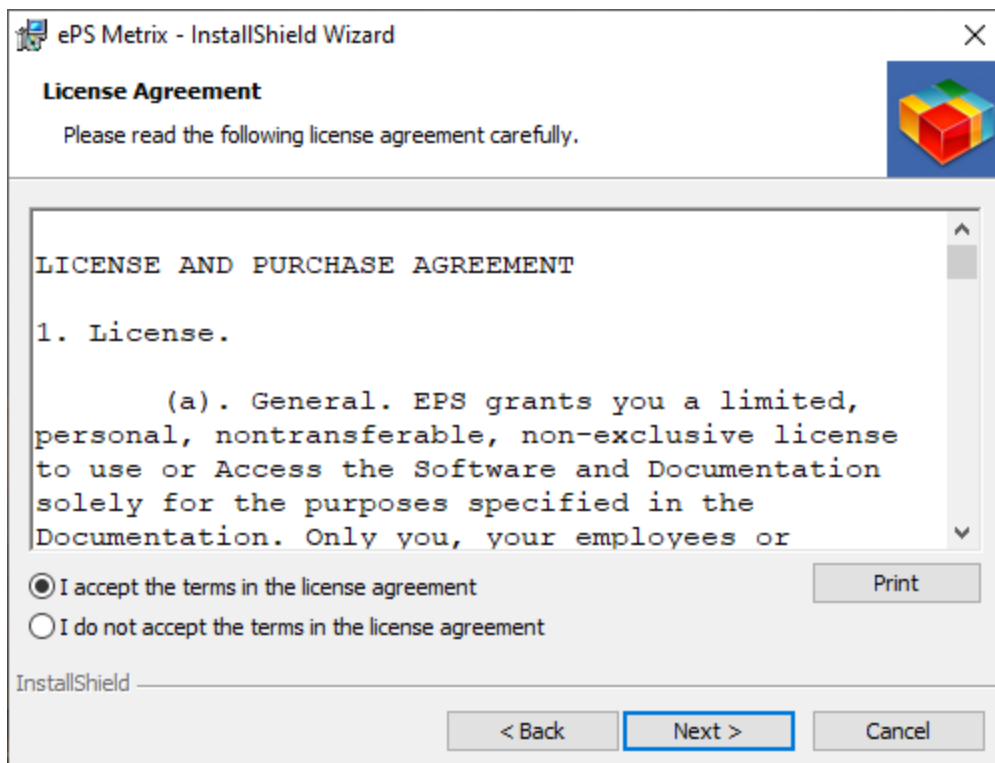
Note For example, ePS Metrix 202212XXXX.exe.

2. Double-click **ePS Metrix Installer**.
3. If the installer requests permission to install Metrix on your computer, click **Yes** to begin the installation.
4. On the welcome screen, click **Next**.

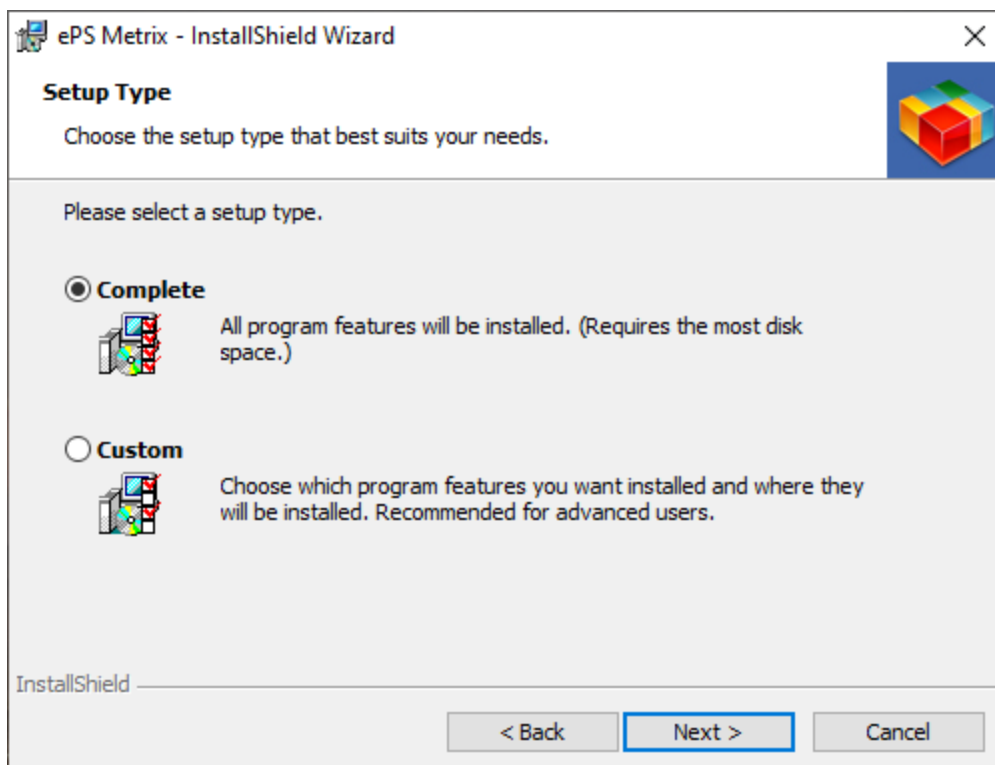


5. On the **License Agreement** screen, read the “ePS Software End User License Agreement,” click **I accept the terms of the license agreement**, and then click **Next**.

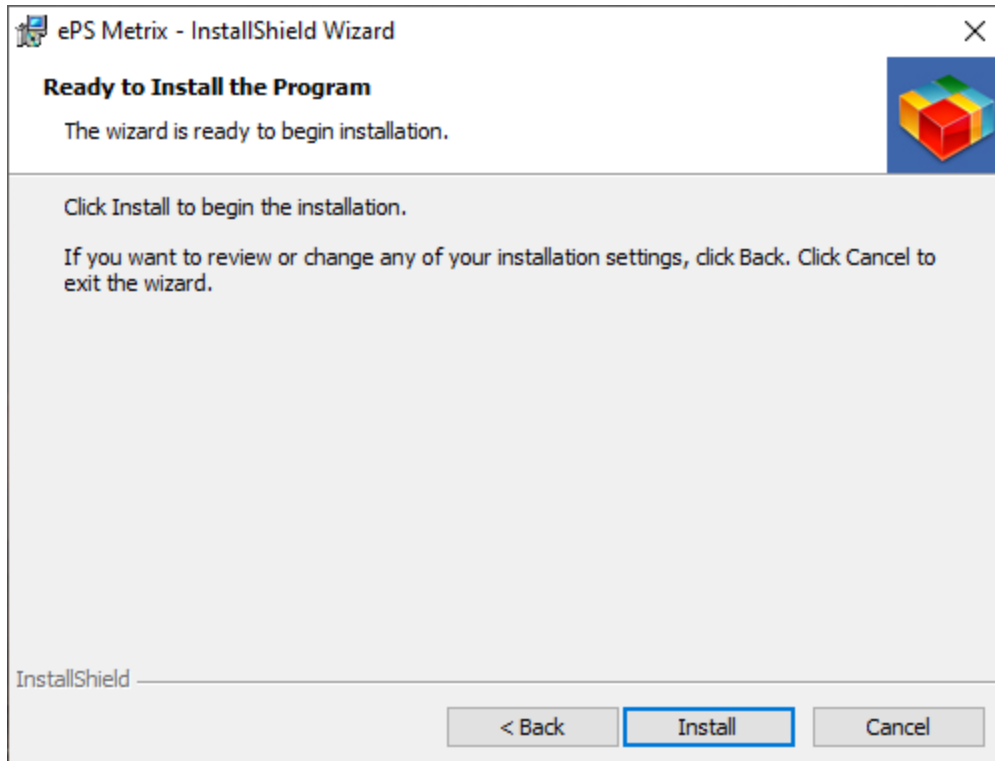
Note Click **Print** if you want to print a copy of the EULA for your records.



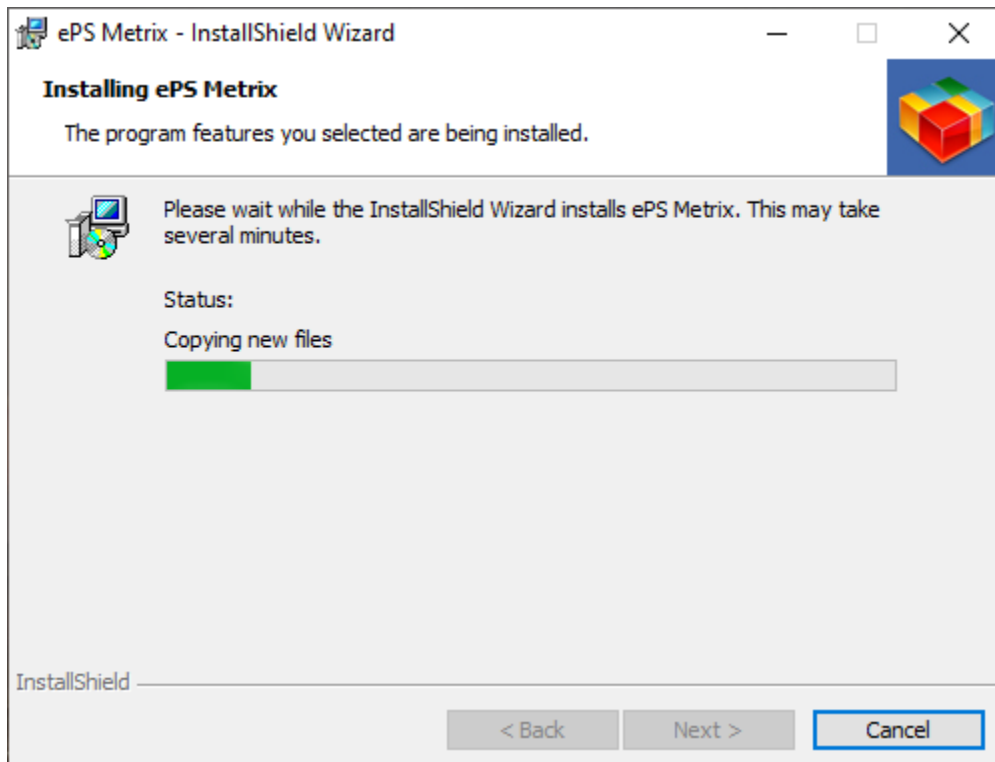
6. In the **Setup Type** screen, select the default **Complete** (unless you have a reason to choose **Custom**), and then click **Next**.



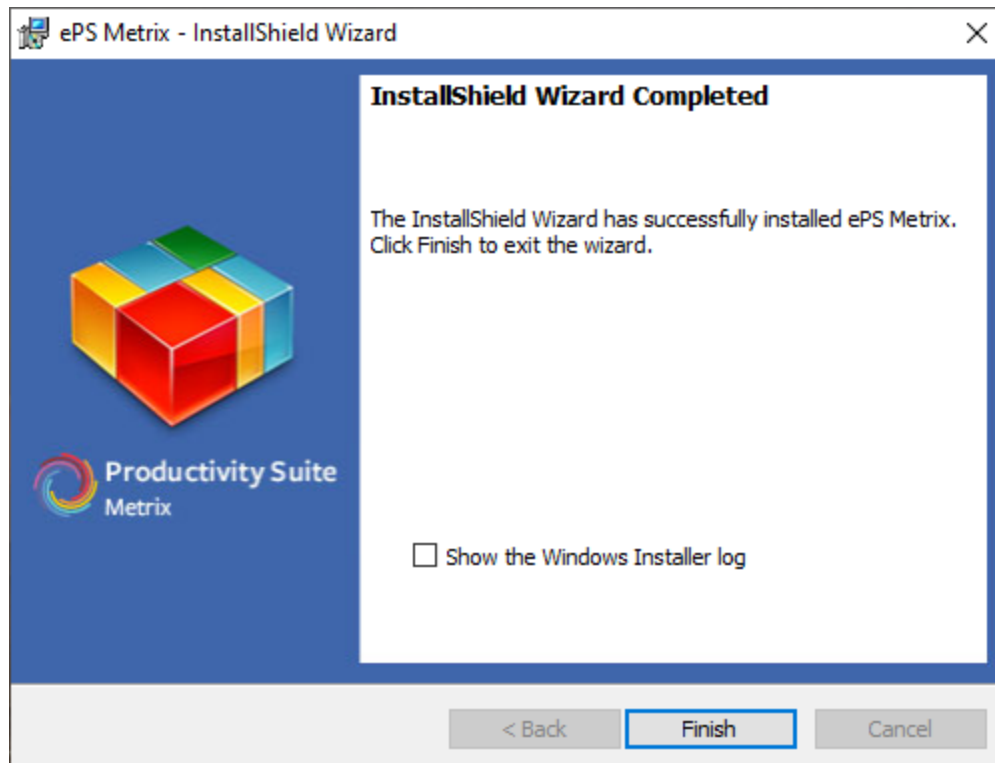
7. On the **Ready to Install the Program** screen, click **Install**.



The **Installing EFI Metrix** screen will show progress as the software is installed.



8. On the **InstallShield Wizard Completed** screen, click **Finish**.



Mac OS installation

Note Metrix 22.1 uses a new PDF renderer for creating previews. On Mac OS 11, there were performance issues with the old renderer. The new one does not have a negative impact on performance, but the quality of the previews may not be as good, especially for text. Contact Metrix Support if this is a problem for you; they can provide instructions on how to force Metrix to use the old PDF renderer.

Minimum system requirements

- **Processor:** Intel Core 2 Duo
- **Note** Media Optimization module requires a minimum 8 core CPU (recommended 16 core if the Super Wide module is used.)
- **Processor Speed:** 2.8 GHz minimum
- **Operating System:**
 - OS 12 (Monterey) (see **Note** above)
 - OS 11 (Big Sur) (see **Note** above)
 - OS X 10.15 (Catalina) (see **Note** below)
 - OS X 10.14 (Mojave)
 - OS X 10.13 (High Sierra)
 - OS X 10.12 (Sierra)
 - OS X 10.11.x (El Capitan)
 - OS X 10.10.x (Yosemite)
 - OS X 10.9.x (Mavericks)

Notes Metrix requires Java 11. Metrix installs and uses this version internally, regardless of the Java version that is installed on the computer.

When Metrix is launched on an unsupported OS, a notice should appear:
“This operating system is not supported.”

- **Memory:**

Notes Metrix installs with memory requirements set to 4 GB for Metrix client and Data Server. If you need to change this, you can reduce it to 2 GB. For instructions on how to do this, contact Metrix Support (see page 5 for contact information).

- Metrix Client – 4 GB RAM
- Metrix Data Server – 2 GB RAM
- eFlow License Manager – 256 MB RAM
- Media Optimization – 16 GB RAM

- **Monitor Resolution:** 1024 X 768 or higher

- **Network (multi-user):** Static IP address for the **Data Server** and **eFlow License Manager**.

Notes If you will use the Content Previews module, the minimum RAM requirement for Metrix is 6 GB with 8 GB or more recommended.

The Content Previews module is processor intensive. Thus, we recommend a fast multi-core processor. If PDF content is being accessed across a LAN, gigabit network speeds are recommended when accessing large content files.

Installing Metrix in OS X 10.9.x or newer

Note If you have Mac OS X 10.9.x (Mavericks) or newer, you may receive an alert screen because the security settings prohibit the installation of programs unless Apple Inc. identifies them.

To work around this:

1. Right-click (or Control-click) the Metrix Installer icon.
2. Select **Open** from the menu to install Metrix without a security alert.

Pre-installation checklist:

Upgrading to Metrix 22.1 from a previous version

If you are upgrading from an earlier version of Metrix, please note that Metrix 22.1 is a full install only – there is no updater. To upgrade, you need to uninstall the previous version of Metrix and then perform a complete reinstall. After completing the steps in this section, you will be directed to go to [Installing Metrix](#).

Be sure to read the instructions from the beginning and save a backup of your Metrix Data and Marks folders, **metrix.properties** file, and Metrix password file (.mpw, needed only if you are upgrading from Metrix 2016.2 or earlier) so that you can revert to your previous version if necessary.

Warning Users upgrading from Metrix 2016.1 or earlier will be required to back up their database, install 2019.2, and then upgrade the database before they can install 22.1 and upgrade the database again.

Metrix for Mac OS – Single User License

Before you begin installing Metrix make sure that:

- Your Mac OS X computer meets the minimum system requirements.
- You have your eFlow License Key available (Metrix needs this key to run).

Metrix for Mac OS – Concurrent User License

Before you begin installing Metrix make sure:

- Your Mac OS X computer meets the minimum system requirements.
- The ports required for Metrix to communicate are open (see below).

- Static IP addresses have been assigned to the Data Server and to the eFlow License Server Control Panel.
- You have your eFlow license key available (Metrix needs this key to run).

Mac OS communication ports

For any multi-user installation of Metrix, the following ports must be open:

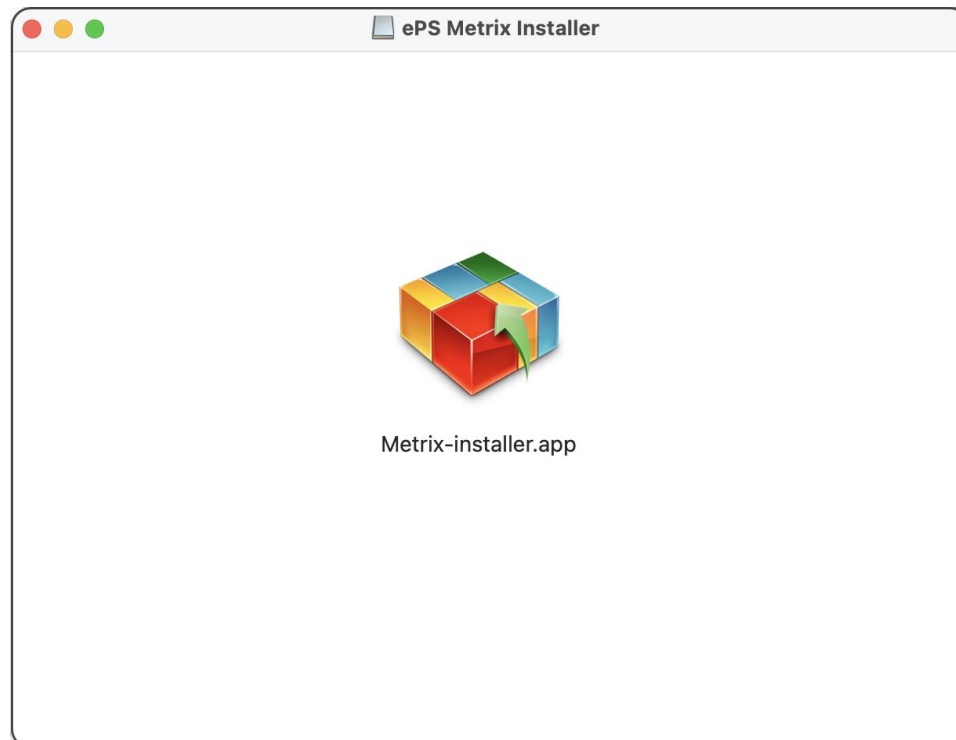
- **Data Server:** 9939
- **eFlow License Manager:** 8081
- **SQL Server:** 1433
- **PostgreSQL Server:** 5432

Installing Metrix on the Mac

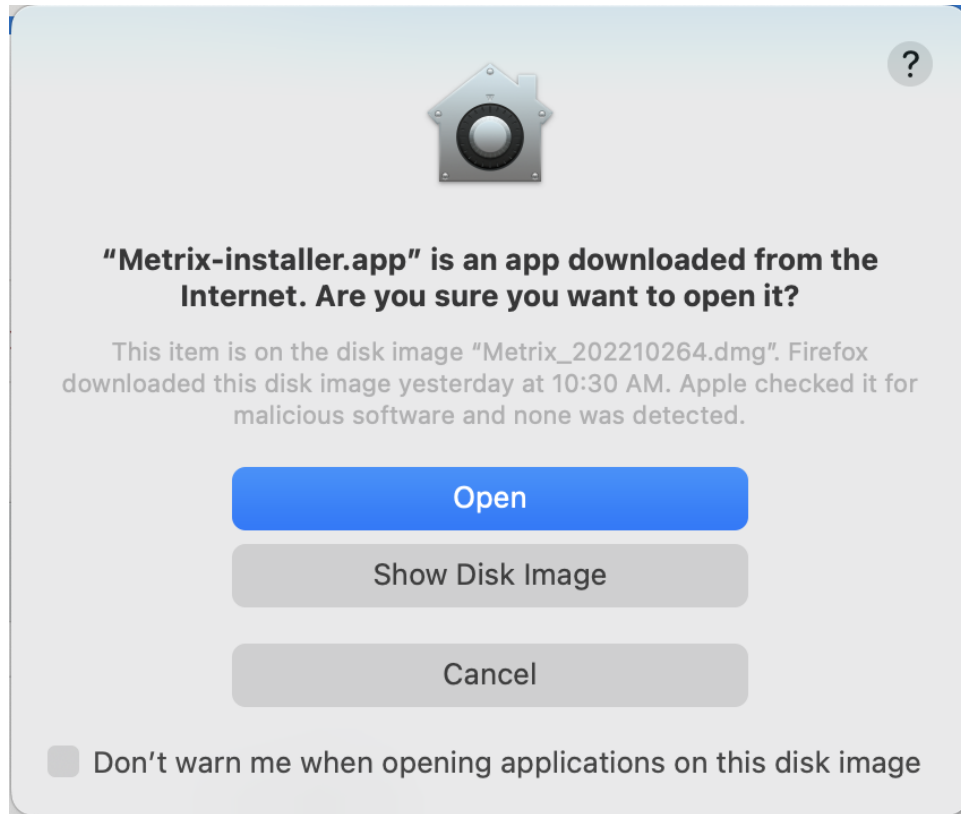
Before installing, we recommend that you close all applications and restart your computer to clear any files from memory.

Important You must have Administrator privileges to install Metrix.

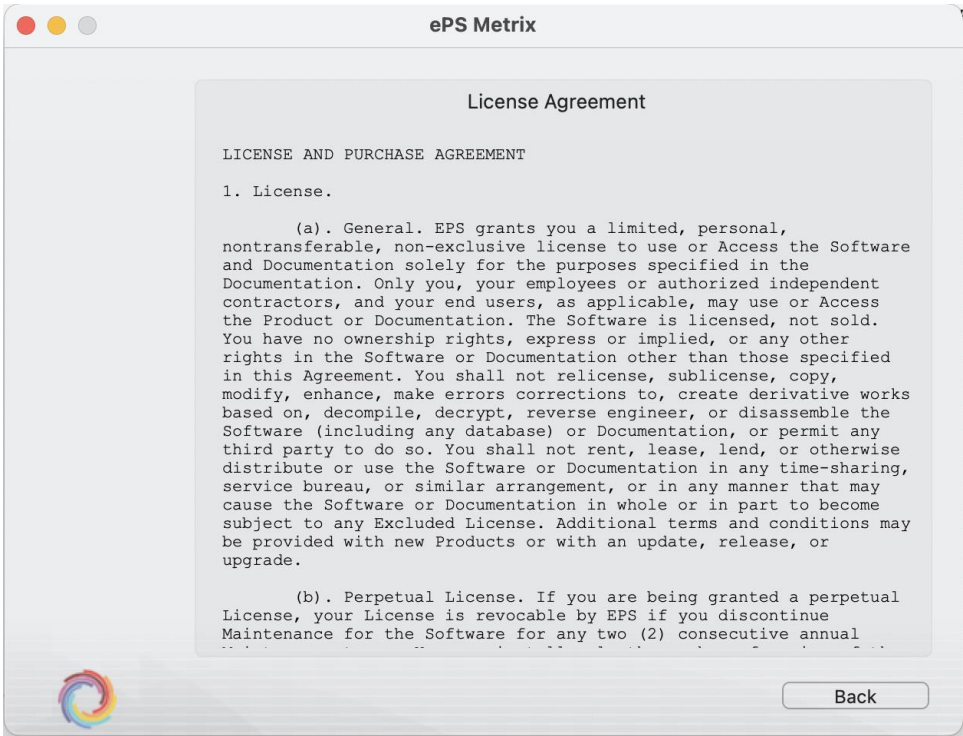
1. Follow these steps to start the **Metrix Installer**:
 - Copy the **EFI Metrix Installer.dmg** file to the desktop on your computer. Exact file names will vary based on the build number.
- Note** For example, EFI Metrix 20212XXXX.dmg.
- Double-click the **EFI Metrix Installer** file to open the **EFI Metrix Installer** disk image.
 - On the EFI Metrix Installer screen, double-click the **EFI Metrix Installer.app** to start the Installer.



2. If an alert screen opens, click **Open** to continue.
-



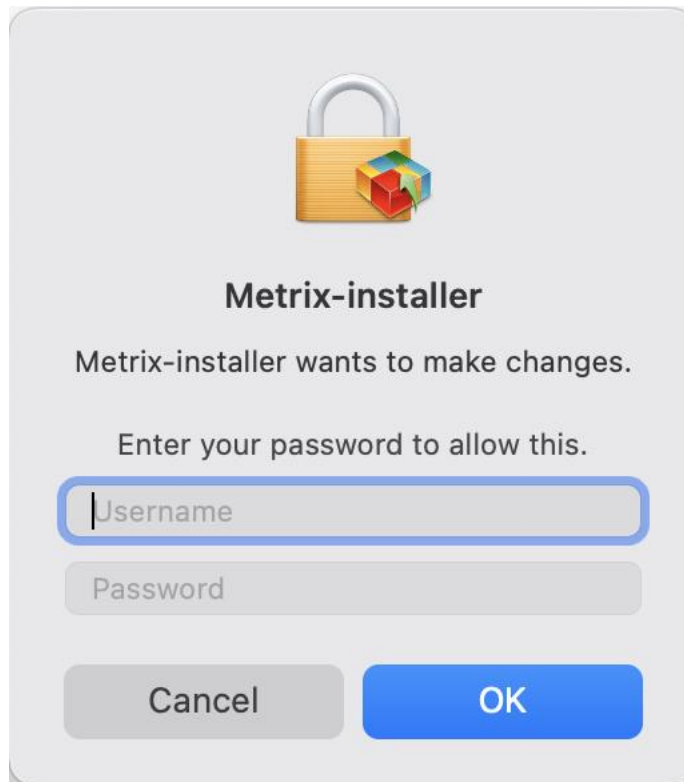
3. On the next screen:
 - Click the **Terms Of Service** link and read the **License Agreement**. Click the **Back** button to return to this screen.
 - If you agree to the terms of the **License Agreement**, select the **I agree to the EFI Terms Of Service** check box.



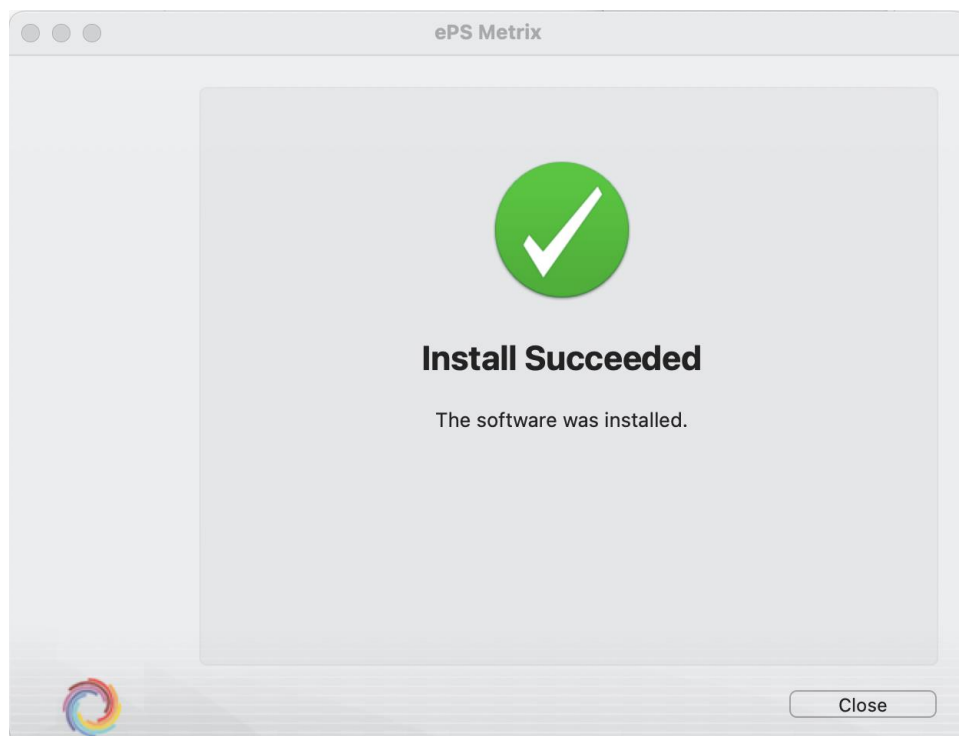
4. Click **Install** to begin the installation process.



5. On the authentication screen, enter the username and password for your system, and then click **OK**.



6. When the installation is complete, click **Close**.



7. To set up Metrix, go to [Launch Metrix and Initial Setup](#).

Launch Metrix and Initial Setup

The Initial Setup process has changed to facilitate configuring Metrix to use SQL servers.

1. Start eFlow License Manager if it is not already running.
2. If you have Concurrent Licensed Metrix, start the Data Server (C:\ProgramFiles\EFI\Metrix or /Applications/EFI/Metrix).
3. Double-click the **Metrix** application icon on your desktop.
4. In the **Metrix Initial Setup** screen:
 - Provide the following setup information (the image below is from a Mac installation):

Metrix Initial Setup

Provide the following setup information.
Red dots indicate required fields.

Locale: English ●

MIS System: (None) ●

License Server Address: ●

Customer ID: ●

Database Configuration Settings

Database: Microsoft SQL Server ▼

Database Address: ●

Database Name: ●

Username: ●

Password: ●

Connection Properties: ●

Measurement Units: Inches/Metric ●

Quit Save and Launch

Note On the right-hand side of the screen you will see red and green icons:

Green = OK

Red = Required fields

- **Locale:** Accept the default **English** or select another language from the pull-down list.
- **MIS System:** Accept the default **(None)** or select an MIS option from the pull-down list.
- **License Server Address:** Enter the static IP address or DNS name for your eFlow License Manager.
 - If you are running the eFlow License Manager on the local machine, enter **localhost** or **127.0.0.1**.
 - If you are running the eFlow License Manager on a different machine, enter the IP address for that server.
- Press the **Tab** or **Enter** key to validate the license server address

Notes When the connection is established, **eFlow** appears in the field next to the **License Server Address** field.

If the text “Failed to identify licensing type” appears, verify that the eFlow License Manager is running, the computer is connected to the network, and you have entered the correct license server address and port (if applicable), and then press **Tab** again. Validation of the license server IP address should take no longer than 5 seconds.

If you choose to change the default port for the eFlow License Manager, enter the IP address followed by a colon and the port number (e.g., 192.168.1.10:8082 or eflow:8082).

- **Customer ID:** Enter the Customer ID number provided by ePS for your Metrix license.

Database Configuration Settings:

- **Database:** Click on the Database pull-down list and choose from the options below.
 - Embedded Database
 - Metrix Database Server (hypersonic)
 - Microsoft SQL Server
 - PostgreSQL Server

Note If you have a Single User License, you must select Embedded Database. If you select either Microsoft SQL Server or PostgreSQL Server, the Database Name, Username, Password, and Connection Properties fields become available. If you select Embedded Database or Metrix Database Server, those fields are disabled.

- **Database Address:** If you selected **Metrix Database Server**, enter the Database Server’s static IP address. If you selected either **Microsoft SQL Server** or **PostgreSQL Server**, enter the DNS name of the computer on which the Database Server is installed.

Note If your SQL configuration requires a port for the Database Server other than the default (1433 for Microsoft SQL Server, 6543 for PostgreSQL Server with eFlow, 5432 for PostgreSQL Server without eFlow, 9939 for Metrix Database Server), in the Database Address field enter the address or DNS Name followed by a colon and the port number (e.g., 123.45.6.78:9999)

- **Database Name:** Enter the name of your database.
- **Username:** Enter your Database Server username.
- **Password:** Enter your Database Server password.
- **Connection Properties:** Enter any additional connection properties you want to use.
- **Measurement Units:** Select an option (i.e., Inches or Millimeters) from the pull-down list.

Note Metrix validates the Database Configuration information when all the relevant fields for the selected database type have been completed.

Note If a message appears at the top of the screen informing you that Metrix cannot find the database server, verify that the server is running, the computer is connected to the network, and you have entered the correct database server address and port (if applicable). Click the **Database Address** field, and then press **Tab** again. Validation of the database server IP address should take no longer than 5 seconds.

- Click **Save and Launch** to open Metrix (or click **Quit** to close without saving), log into Metrix with the password that applies to your User Role, and then click **OK**.

Important Change the password to a more secure alternative when you are finished, or create your own user IDs and passwords in the database.

Login	Password
Administrator	a
Guest	guest
Senior	senior
Junior	junior

Upgrading Metrix

Metrix 22.1 is a full install only – there is no updater. To upgrade, you need to uninstall the previous version of Metrix and then perform a complete reinstall. After completing the steps in this section, go to [Installing Metrix](#).

(1) Shut Down the Data Server and the License Server

Shutting down the Data Server

Ensure that all Metrix clients are shut down.

Metrix 2016.2 and earlier: On the Data Server computer, execute **Shutdown Metrix Data Server**.

Metrix 2017.3 and later: In the Metrix Data Server window, click **Shutdown**.

Important These are the **only** methods you should use to shut down the Data Server.

If the Data Server is ever shut down abruptly (for example, with a CTRL+C in a command line in Windows or Force Quit in Mac OSX), some data loss may occur.

(2) Back up your Metrix 21.2 (and earlier) files and folders

To preserve the Metrix database, marks, and settings, back up these Metrix folders and files found inside your Metrix folder, C:\ProgramData\EFI\.. An easy way to do this is to make a copy on your desktop of these folders.

- Data folder
- Marks folder
- **metrix.properties** file (Metrix 2016.2 and earlier)

Note Not all configurations of Metrix have all the above folders and files in the Metrix folder. If your Metrix folder does not contain all the above folders and files, then back up the files it does contain.

(3) Uninstall Metrix

Windows

1. Go to the Windows Control Panel.
2. Select **Uninstall a program** and uninstall the EFI Metrix program.
3. Delete the **Metrix** folder at C:\ProgramData\EFI\.

Note If your ProgramData folder does not appear in your C: drive menu, follow the steps below to make the ProgramData folder visible:

1. Click the Windows Start button.
2. In the Search programs and files field, type “folder options.”
3. Select the “Change search options for files and folders” option.
4. Open the **View** tab.
5. In the **Files and Folders | Hidden files and folders** section, select **Show hidden files, folders, and drives**.
6. Click **Apply**.
7. Click **OK**.

4. You should now be able to see the **ProgramData** folder on your hard drive so you can open it and delete the **Metrix** folder.

Mac

1. Go to **Applications > EFI** on your computer and drag the **Metrix** folder into the trash.
Note If the Metrix shortcuts on your desktop did not disappear, drag them into the trash too.
2. Empty the trash.

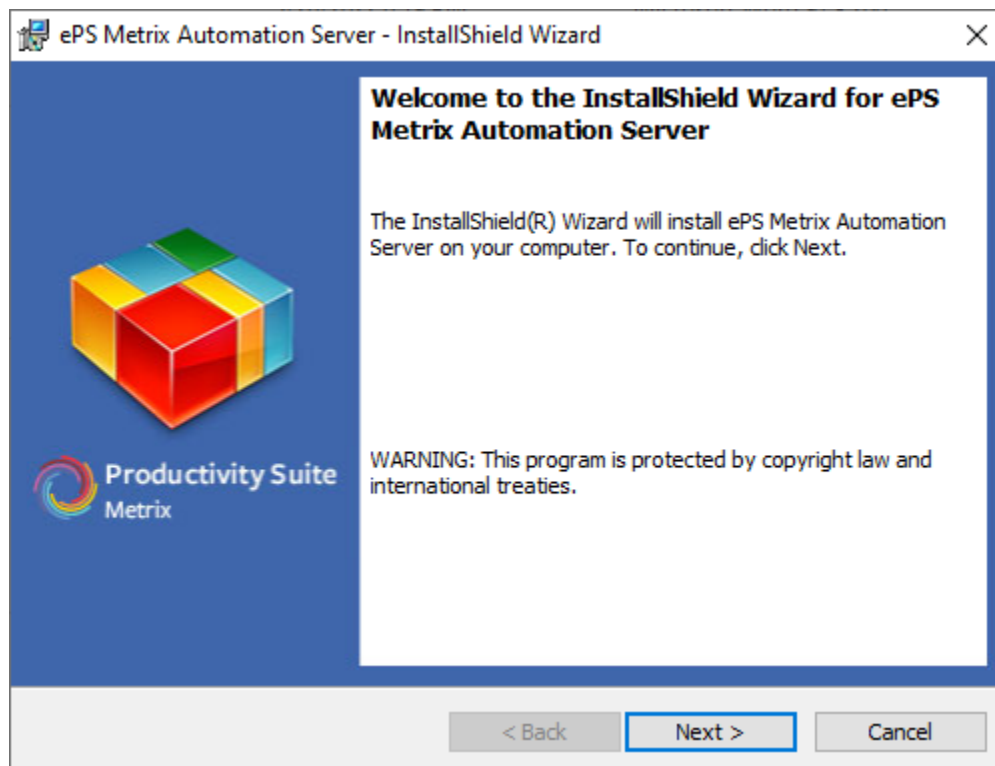
Installing Metrix Automation Server (AS)

Note Metrix Automation Server runs only on Windows.

Installing Metrix Automation Server

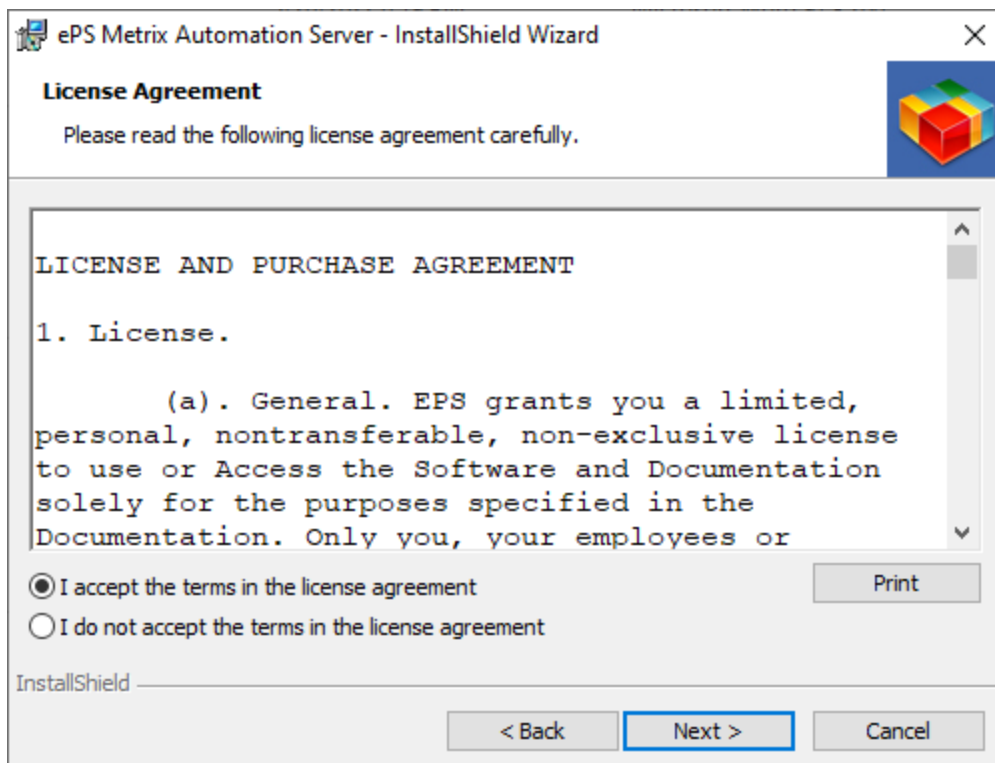
Before installing, close all applications and restart your computer to clear any files from memory.

1. Copy the **Metrix_AutomationServer_20221XXX.exe** file to your computer. Exact file names will vary based on the build number.
2. Double-click **ePS Metrix Installer**.
3. If the installer requests permission to install Metrix on your computer, click **Yes** to begin the installation.
4. On the welcome screen, click **Next**.

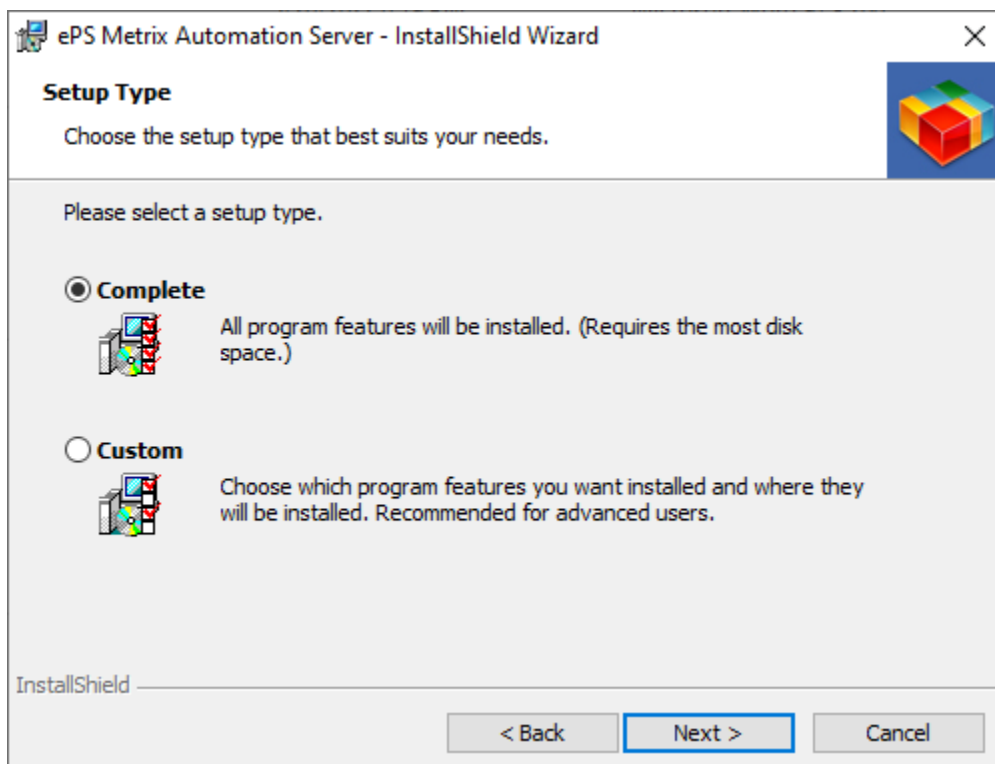


5. On the **License Agreement** screen, read the “ePS Software End User License Agreement,” click I **accept the terms of the license agreement**, and then click **Next**.

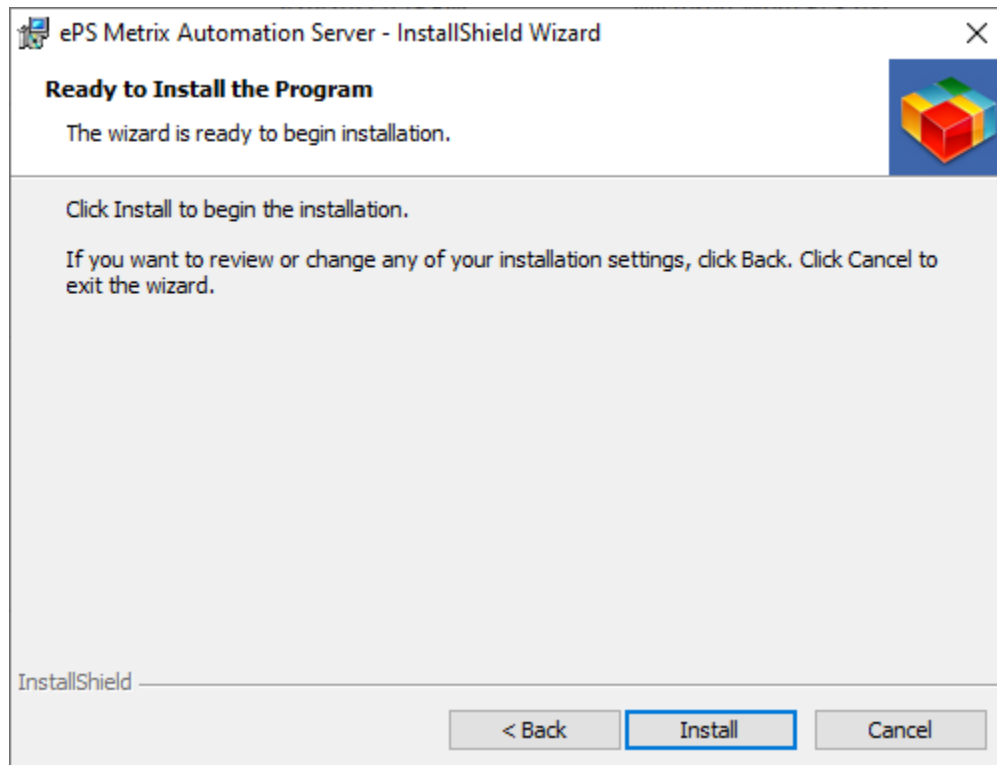
Note Click **Print** if you want to print a copy of the EULA for your records.



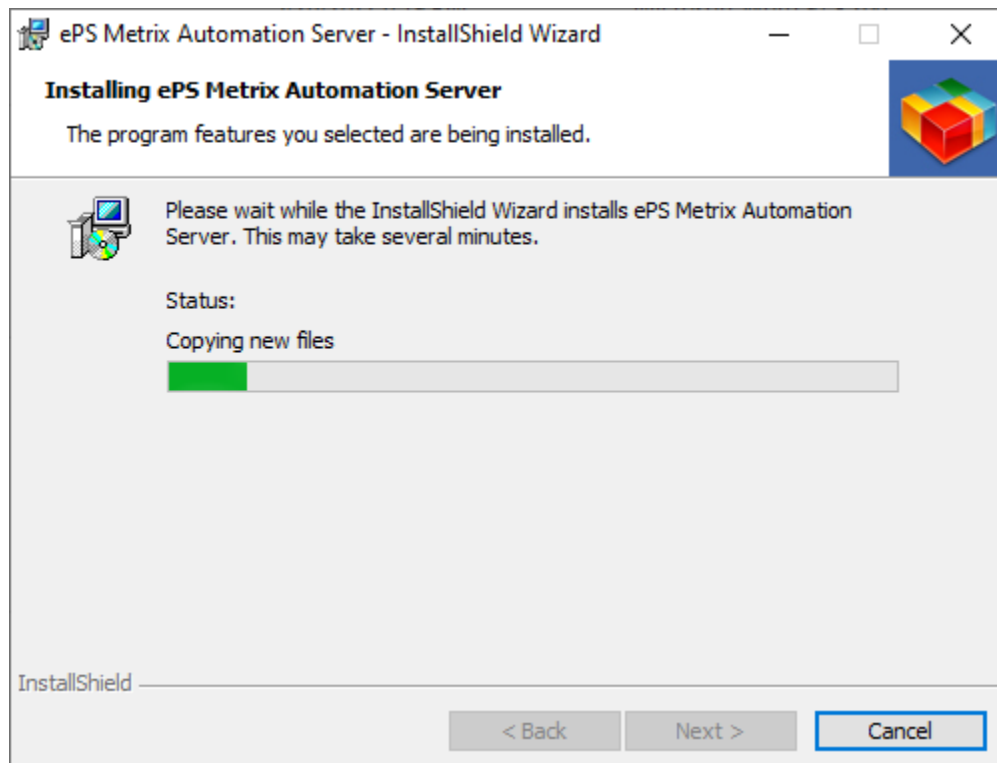
6. In the **Setup Type** screen, select the default **Complete** (unless you have a reason to choose **Custom**), and then click **Next**.



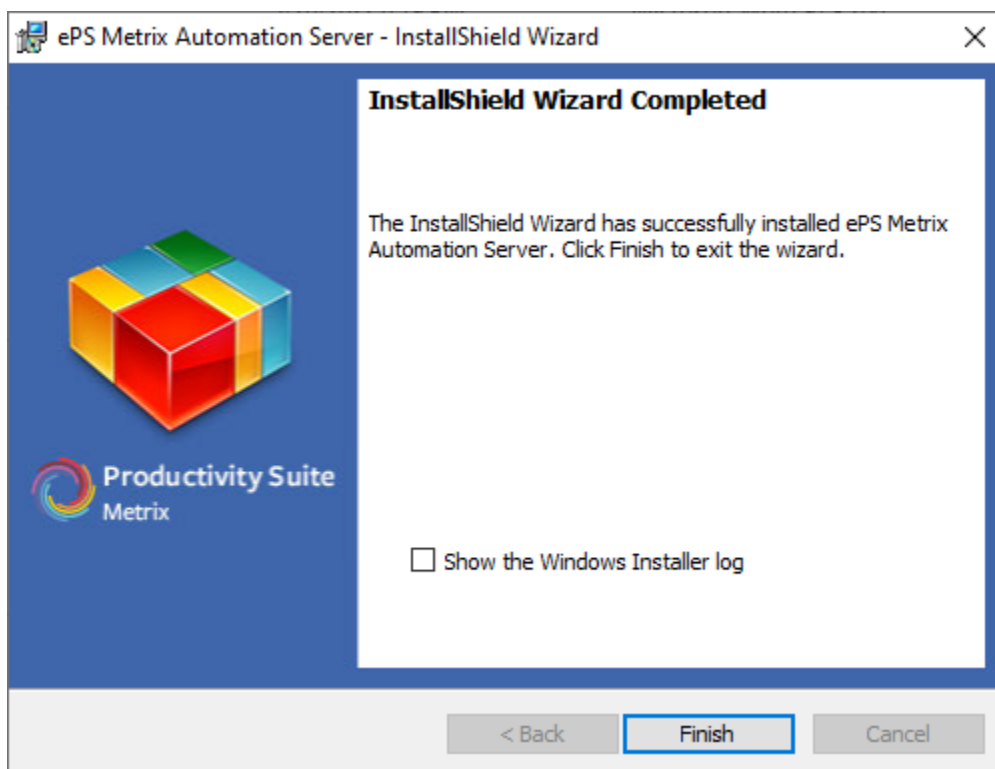
7. On the **Ready to Install the Program** screen, click **Install**.



The **Setup Status** screen will show progress as the software is installed.



- On the **InstallShield Wizard Complete** screen, click **Finish**.



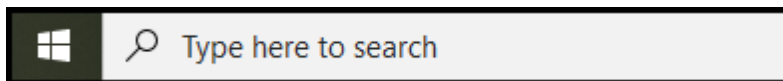
Configuring Metrix Automation Server as a Service

Metrix Automation Server can be configured to run as a headless service for optimization. This service needs to be readily available and resilient, so it is recommended to deploy this application as a Windows service.

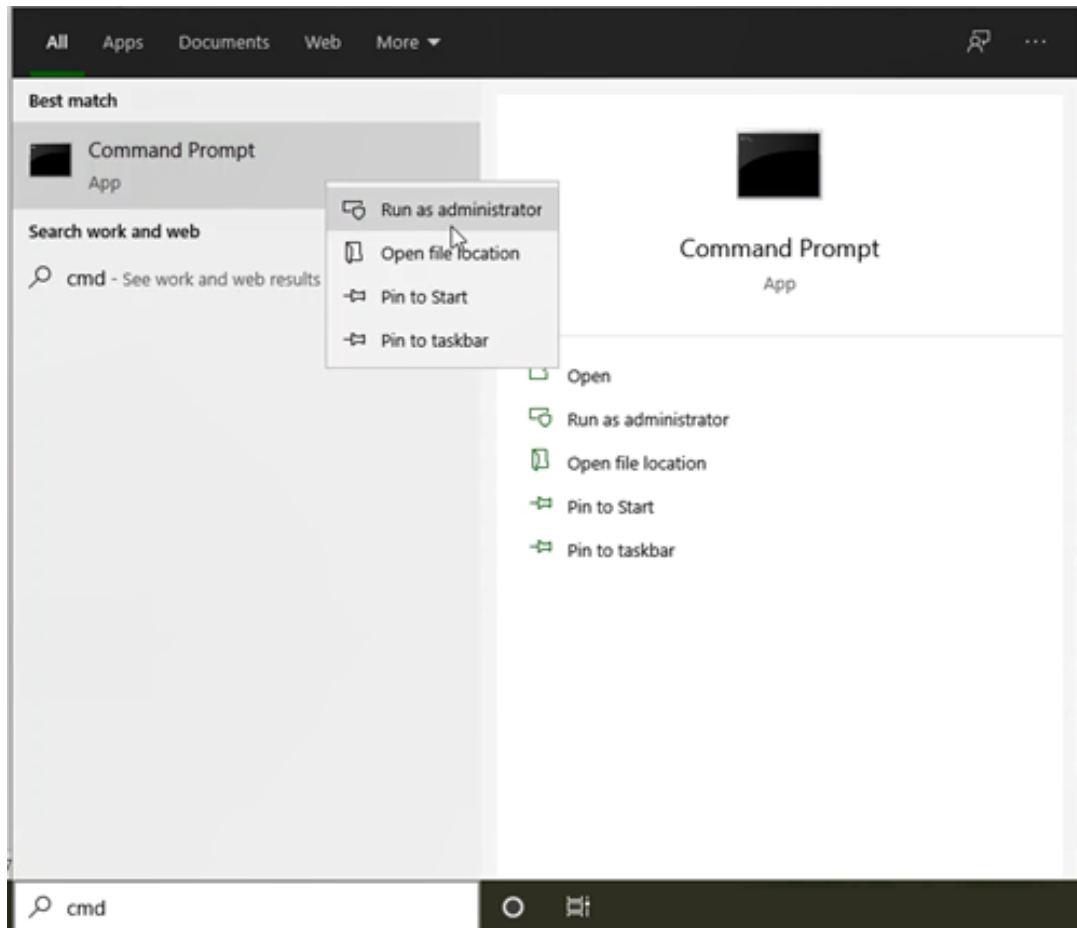
Configuring Metrix Automation Server as a Service

- Follow the standard procedures for [installing the Metrix Automation Server](#).
- Run Metrix in GUI mode and configure the application to ensure it is functioning normally.
- Close the application.
- Press the **Windows** key and type **cmd**.

Note You can also enter **cmd** directly into the **Windows** search bar.



- Right-click on **Command Prompt** and select **Run as administrator**.



6. Execute the following commands one at a time.

Command: `cd "Program Files\EFI\MetrixAS\Service\bat"`

Note If this folder does not exist, the installed version of Automation Server does not support Windows service and you cannot complete the configuration.

- a. **Action:** Temporarily set the JAVA_HOME to Metrix Java.
 - i. **Command:** `set JAVA_HOME="C:\Program Files\EFI\MetrixAS\JREX64"`
- b. **Action:** Permanently add the Metrix Java to the system path.
 - i. **Command:** `setx path "%path%;C:\Program Files\EFI\MetrixAS\JREX64\bin"`

7. Install the service.

- a. **Action:** Install the service.
 - i. **Command:** `installService.bat`

Notes If the command does not execute the install, run `setenv.bat` and then run `installService.bat` again.

Optionally, you can run the command `startService.bat`.

Other commands include `StopService.bat` and `UninstallService.bat`.

8. Go to **Services** in Windows and locate the **Metrix Automation Server**, or **Metrix Automation Server Pace**.
9. Right-click and change **Automatic** to **Automatic with delay**.
10. The first time you must start the service manually.

Notes To confirm the service is running go to **C:\ProgramData\EFI\MetrixAS\Logs** and try to delete all files. If the system returns the **Unable to delete two files** message, this means the service is running.

If your server machine gets restarted, then the Metrix Automation Server service will start automatically.

Upgrading Metrix Automation Server

Metrix 22.1 Automation Server is a full install only – there is no updater. To upgrade, you need to uninstall the previous version of Metrix Automation Server and then perform a complete reinstall. After completing the steps in this section, go to [Installing Metrix Automation Server](#).

(1) Shut Down Metrix Automation Server

(2) Back up your Metrix Automation Server 21.2 (and earlier) **metrix.properties** file

To preserve the Metrix Automation Server configuration and licensing settings, back up the **metrix.properties** file, which is in C:\ProgramData\EFI\Metrix. An easy way to do this is to make a copy on your desktop.

(3) Uninstall Metrix Automation Server

1. Go to the Windows Control Panel.
2. Select **Uninstall a program** and uninstall the EFI Metrix Automation Server program.
3. Delete the **Metrix** folder at C:\ProgramData\EFI\.

Note If your ProgramData folder does not appear in your C: drive menu, follow the steps below to make the ProgramData folder visible:

1. Click the Windows Start button.
 2. In the Search programs and files field, type “folder options.”
 3. Select the “Change search options for files and folders” option.
 4. Open the **View** tab.
 5. In the **Files and Folders | Hidden files and folders** section, select **Show hidden files, folders, and drives**.
 6. Click **Apply**.
 7. Click **OK**.
4. You should now be able to see the **ProgramData** folder on your hard drive so you can open it and delete the **Metrix** folder.

(4) Install Metrix Automation Server

Go to [Installing Metrix Automation Server](#) and follow the instructions. When the installation is complete, place the backup copy of the **metrix.properties** file in C:\ProgramData\EFI\MetrixAS and then launch Metrix Automation Server.

Appendix A: Where Metrix Files Are Installed in Windows

Metrix 22.1 for Windows has been engineered to run properly for a non-administrator user without requiring Run as Administrator privileges. Windows Metrix 22.1 looks for files in the **ProgramData/EFI** folder.

The initial configuration of the following folders and file will be in the **ProgramData/EFI** folder (although some are user configurable and may be changed to user-specified locations):

- Automation
 - Commands
 - Content
 - Data
-

- PreviewCache
- PreferencesBackup
- Imports
- Logs
- **metrix.properties** file

Note If your ProgramData folder does not appear in your C: drive menu, follow the steps below to make the ProgramData folder visible:

1. Click the Windows **Start** button.
 2. In the **Search programs and files** field, type “folder options.”
 3. Select the **Change search options for files and folders** option.
 4. Open the **View** tab.
 5. In the **Files and Folders | Hidden files and folders** section, select **Show hidden files, folders, and drives**.
 6. Click **Apply**.
 7. Click **OK**.
-