

Energy Essentials Installation Instructions

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Energy Essentials Introduction.....	2
Summary of Changes.....	2
Concepts.....	2
Energy Essentials Overview.....	2
Energy Essentials Workflow.....	2
Detailed Procedures.....	4
Installing and Upgrading Energy Essentials.....	4
Troubleshooting.....	7
Energy Essentials Troubleshooting.....	7
Related Documentation.....	7

Energy Essentials Introduction

This document describes how to install Energy Essentials.

Notes:

- Before you attempt to install Energy Essentials, verify that *Metasys*® Advanced Reporting can correctly run a report. Refer to the *Verifying the Metasys Advanced Reporting System is Working Properly* section in the *ADS/ADX Commissioning Guide (LIT-1201645)* or *ODS Commissioning Guide (LIT-12011944)*.
- To install Energy Essentials, an Extended Application and Data Server (ADX) or Open Data Server (ODS) with the *Metasys*® Advanced Reporting System at the same release level is required. This document does not describe how to install the *Metasys* Advanced Reporting System. See [Table 2](#).
- The release number of Energy Essentials must match the release number of the ADS/ADX or ODS, and *Metasys* Advanced Reporting System software installed on the same computer.

Summary of Changes

No technical changes were made to the document for this release.

Note: Although the installation wizard images are not updated, the steps included in this document do apply to the *Metasys* Release 9.0 software installation.

Concepts

Energy Essentials Overview

Energy Essentials is an add-on to the *Metasys* Advanced Reporting System that focuses on the energy and utility use of your site.

Energy Essentials produces the following reports:

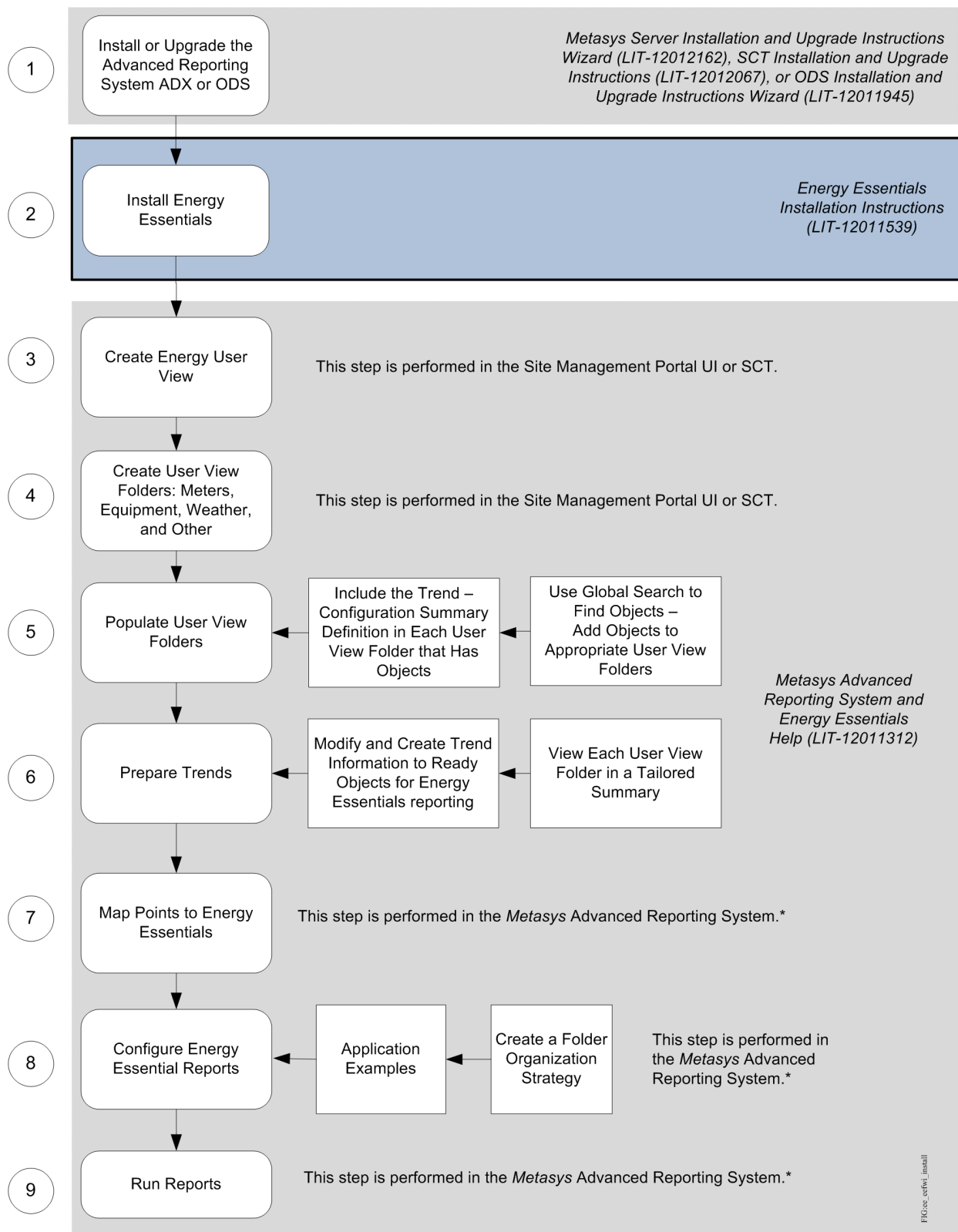
- Big Picture Energy
- Consumption
- Electrical Energy
- Equipment Runtime
- Load Profile
- Production
- Simple Cost

See [Energy Essentials Workflow](#) for information on the steps required to use Energy Essentials.

Energy Essentials Workflow

[Figure 1](#) shows the overall workflow for Energy Essentials and refers to the documentation that contains more information on each step. Steps 1 through 6 are required for initial setup only, after which Step 7 can be done at any time.

Figure 1: Overview of Energy Essentials Workflow and Documentation



* To log on to the *Metasys Advanced Reporting System*, you must first log on to the Site Management Portal UI and accept the license agreement. You also must have the Advanced Reporting privilege and your access type must have Standard Access in the *Metasys Security Administrator System*.

Detailed Procedures

Installing and Upgrading Energy Essentials

This section corresponds to Step 2 in the overall Energy Essentials workflow ([Figure 1](#)).

If you are using a split ADX configuration, install Energy Essentials on the web/application server computer.

Energy Essentials Installation Software (MS-EREPORT-0): Use the installation package for new Energy Essentials installations. You may also use the new installation software to upgrade Energy Essentials.

Notes:

- The *Metasys* release version of *Metasys* Energy Essentials must match the release version of the ADX or ODS. Customers who are upgrading their ADX to Release 9.0 and have an older release of Energy Essentials installed must upgrade and activate Energy Essentials at Release 9.0. Use product code MS-EREPORT-6.
- *Metasys* Energy Essentials requires you to license the product with the License Activator tool. For details about how to license Energy Essentials, refer to the *Software License Activator Technical Bulletin (LIT-1201654)*.
- To determine if the computer has Energy Essentials software installed, look for an entry called Energy Essentials in Add or Remove Programs or Programs and Features in Control Panel.

Table 1: Energy Essentials Software Installation and Upgrade Steps

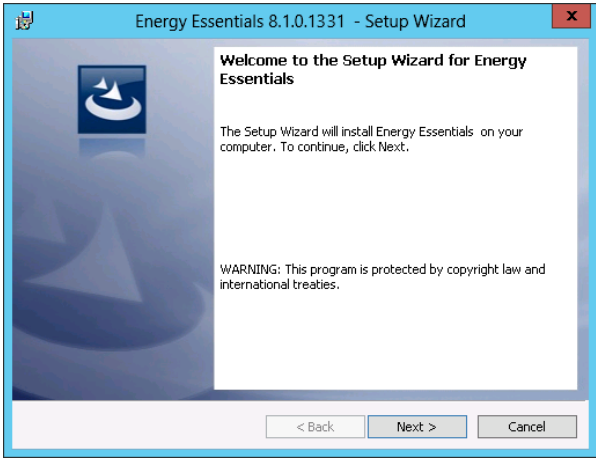
1.	Start	Verify the following: • The <i>Metasys</i> Advanced Reporting System is installed and fully functional. • The release version of the <i>Metasys</i> Advanced Reporting System and Energy Essentials is the same.
2.		Insert the Energy Essentials disc. Browse the Energy Essentials disc and double-click setup.exe . The installation program checks that you have all required prerequisites. If you are missing a prerequisite, cancel the installation sequence and install the required software.
3.	Figure 2: Energy Essentials Welcome Window 	Click Next .

Table 1: Energy Essentials Software Installation and Upgrade Steps

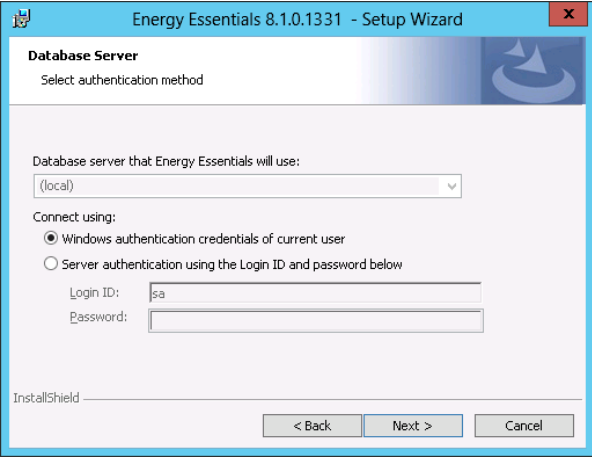
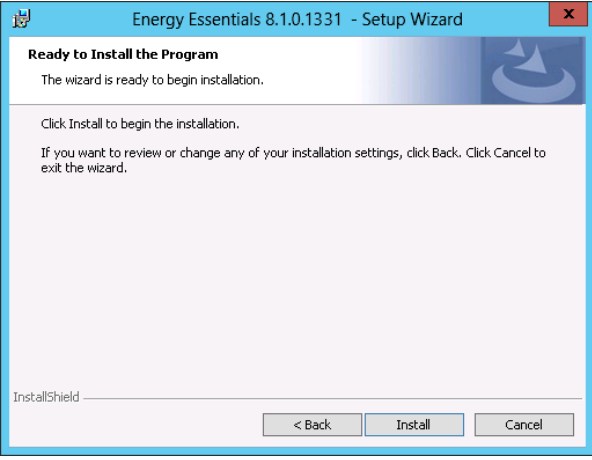
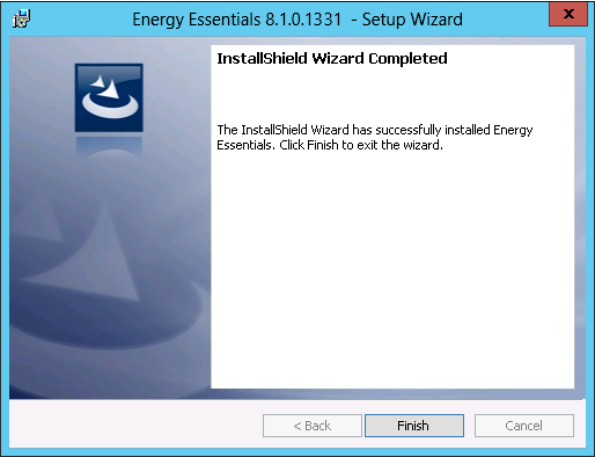
4.	Figure 3: Database Server Window 	For an ADX Database server that Energy Essentials will use, the Energy Essentials installation program selects the same Microsoft® SQL Server® instance that the ADX or ODS uses. Under Connect using, click one of the following: • Windows authentication credentials of current user: Click this option to log in to SQL Server using the name and password of the user currently logged in to the Microsoft Windows® operating system. • Server authentication using the Login ID and password below: Click this option to use a SQL Server System Administrator (sa) ID and password. Click Next.
5.	Figure 4: Ready to Install the Program Window 	Click Install. The Files in Use dialog box may appear. In the Files in Use dialog box, click Automatically close and attempt to restart applications and click Next.

Table 1: Energy Essentials Software Installation and Upgrade Steps

6.	Figure 5: Installation Complete Window 	Click Finish .
7.	Done	The installation is complete. If you receive a message to restart the computer, restart now. Wait 5 minutes before logging in to the <i>Metasys</i> Advanced Reporting System UI so that the initialization processes can occur. License the Energy Essentials software. For details, refer to the <i>Software License Activator Technical Bulletin (LIT-1201654)</i>. Before you use Energy Essentials, perform the additional steps as indicated in the overall Energy Essentials workflow (Figure 1).

Troubleshooting

Energy Essentials Troubleshooting

Installation Procedure

Errors during the installation process are recorded in the EnergyEssentialsInstallLog.htm log file. You can find the file in this location:

C:\Users\<user name>\AppData\Local

Note: <user name> represents the name of the user who is currently logged in to the computer.

Related Documentation

The following table lists documentation related to Energy Essentials.

Table 2: Energy Essentials Documentation

For Information On	See Document
Installing or Upgrading an ADX with the <i>Metasys</i> Advanced Reporting System	<i>Metasys® Server Installation and Upgrade Instructions Wizard (LIT-12012162)</i> ¹
Installing or Upgrading an ODS with the <i>Metasys</i> Advanced Reporting System	<i>ODS Installation and Upgrade Instructions Wizard (LIT-12011945)</i>
Using the <i>Metasys</i> Advanced Reporting System	<i>Metasys® Advanced Reporting System and Energy Essentials Help (LIT-12011312)</i>
Mapping Points to Energy Essentials, Configuring Energy Essentials Reports, and Running Energy Essentials Reports	<i>Metasys® Advanced Reporting System and Energy Essentials Help (LIT-12011312)</i>

¹ Use the wizard to generate instructions specific to your system.



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