

Metasys® Export Utility Installation Instructions

Code No. LIT-12011527

Software Release 9.0

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Introduction

This document describes how to install and upgrade the Export Utility application for use with the *Metasys*® system.

Summary of Changes

Supported programs and servers were updated in [Table 6](#).

Metasys Help Files

The *Metasys* Help files provide shared system information and individualized mode-dependent information for the *Metasys* Site Management Portal (SMP) or the System Configuration Tool (SCT). The *Metasys*® *SMP Help* (LIT-1201793) provides information about alarming, commanding, auditing live data values, and other online features. The *Metasys*® *SCT Help* (LIT-12011964) provides information about offline operations such as managing archives, creating spaces, simulating systems, and establishing equipment and serving relationships.

In either SMP or SCT mode, the *Metasys* Help menu provides Help files in PDF format.

Concepts

Overview

The Export Utility is based on the Windows® operating system (OS) that uses Web Services to extract data from the *Metasys* system. It runs from an Application and Data Server/Extended Application and Data Server (ADS/ADX), an Open Data Server (ODS), or from a stand-alone computer on the same network.

The *Metasys* system Export Utility extracts historical trend, alarm, and audit data from the Network Automation Engine (NAE)/Network Integration Engine (NIE)/Network Control Engine (NCE), ADS/ADX, or ODS. This data is then provided in several file formats, such as Microsoft Excel® spreadsheet and Access database, as selected by the user. The user can instantly extract the selected data or schedule an extraction at a convenient time or interval.

Note: If you encounter an out-of-memory exception as you export data, select a smaller data set, or increase RAM.

System Requirements

See the [Technical Specifications](#) section for details.

All *Metasys* system devices from which you are extracting data must be at Release 2.0 or later.

User Interface

The Export Utility provides a user-friendly wizard that allows the user to enter data-filtering criteria and scheduling intervals to extract trend, alarm, audit data, and output file types.

Supported File Formats

The Export Utility extracts user-defined data to any of the following file formats:

- Microsoft Excel (.xls)
- Tab-delimited text (.txt)
- Comma-separated value (.csv)
- Microsoft Access (.mdb)
- HTML (.htm)
- XML version 1.0 (.xml)

- Note:**
- If you change the extension on the Advanced tab of the Export Output Selection dialog box, the Export Utility only creates output reports using the supported extension types. For example, if you rename a .htm file extension with a .html extension on the Advanced tab, Export Utility creates the file with a .htm extension.
 - Scheduled Export using the Excel format (.xls) is not supported on Windows Server® 2016, Windows Server® 2012 R2, or Windows Server® 2012. Microsoft Excel reports generation on a Windows 8.1 64-bit machine running on a virtual machine (VM) using the MSEASchedulerService is not supported. All other export formats are supported. We recommend using .csv format for the Scheduled Export and then manually importing the .csv file into Excel and saving it in Excel format.
 - Windows Server 2016, Windows Server 2012 R2, and Windows Server 2012 support On Demand Export using Excel format.

Export Utility Authentication

The user must have login credentials with the Site Director and have login credentials and permissions to view the data to be extracted with the Export Utility. The user must know the IP address or the host name of the Site Director. The Export Utility follows *Metasys* system authentication, using the same user name and password. If login fails, contact your *Metasys* system administrator.

Note: When creating an Export Utility Definition (EUD) file, the user login credentials used to create the EUD file must persist. If the user login credentials are deleted, the EUD file no longer works.

Licensing

The Export Utility can be purchased with the ADS/ADX, with the ADS-Lite or ODS, or as a separate program, so there are two ways to activate the license. Use the instructions in the *Software License Activator Technical Bulletin (LIT-1201654)* in either case.

We recommend that you license *Metasys* software immediately after installation. For complete licensing details, refer to the *Software License Activator Technical Bulletin (LIT-1201654)*.

Export Utility licenses are sold per computer (not per site). For more information on Export Utility licensing, refer to the *Metasys® Export Utility Product Bulletin (LIT-1201800)*.

Export Utility with an ADS/ADX or ODS

If you purchase the Export Utility with an ADS/ADX or ODS, use one Site Key to license all software programs together.

Export Utility on Stand-Alone Computer

On a stand-alone computer (not on the computer that has the ADS/ADX or ODS installed), activate the Export Utility license with its own Site Key.

Detailed Procedures

Installing Export Utility

Note: To upgrade the Export Utility, see [Upgrading Export Utility](#).

Table 1: Export Utility Software Installation Steps

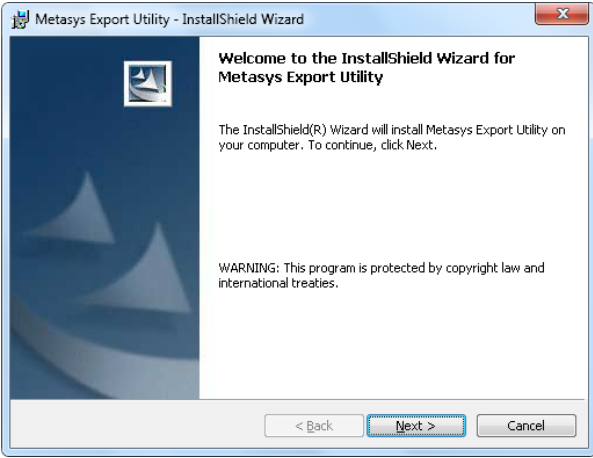
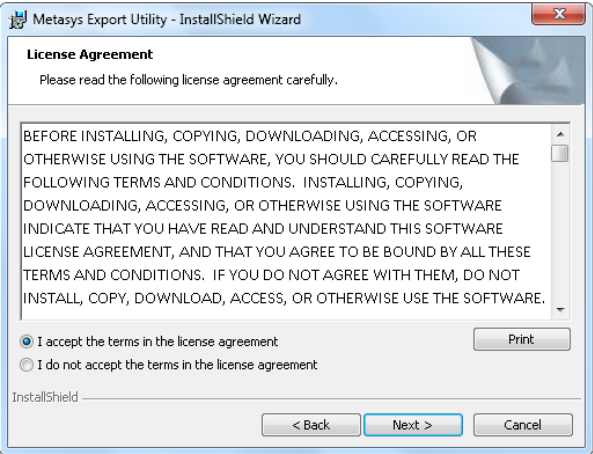
1.	Start	Microsoft Message Queue (MSMQ) installation is required before the Export Utility may be installed. 1. Open the Control Panel window. 2. Click Programs and Features. The Uninstall or change a program window appears. 3. Click Turn Windows features on or off. The Windows Features dialog box appears. 4. Select Microsoft Message Queue (MSMQ) Server. 5. Click Ok. Now that MSMQ is installed, Export Utility may be installed. Insert the Export Utility product disk. Using Microsoft Windows Explorer, browse to the Export Utility folder. Double-click setup.exe.
2.	Figure 1: Welcome Screen 	Click Next.
3.	Figure 2: License Agreement 	Click the option to accept the license agreement. Note: If you do not accept, the Next button remains disabled, and you must click Cancel. Click Next.

Table 1: Export Utility Software Installation Steps

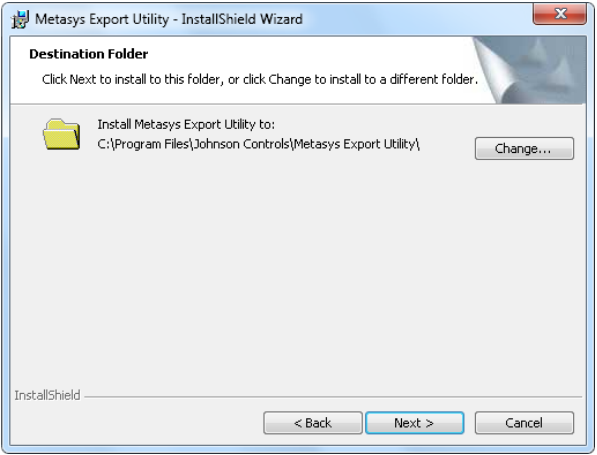
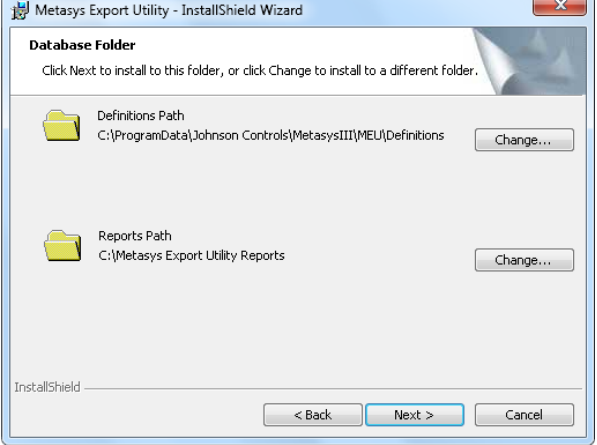
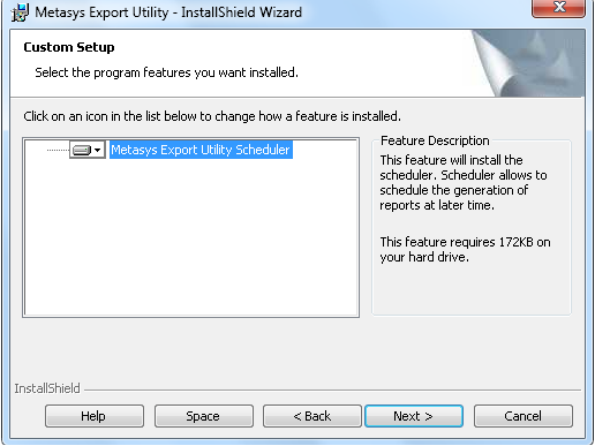
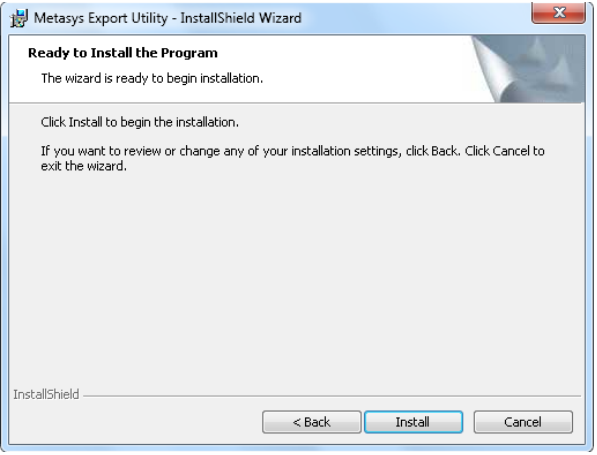
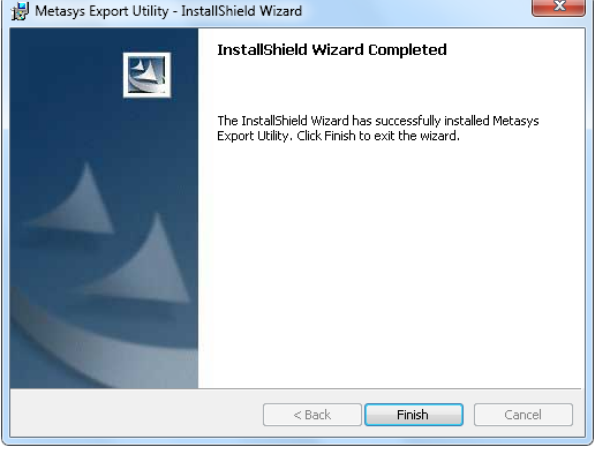
4.	Figure 3: Destination Folder Screen 	If you do not want to use the default folder for installation of the Export Utility files: 1. Click Change. 2. Browse to the desired path. 3. Click OK. Click Next.
5.	Figure 4: Database Folder Screen 	If you do not want to use the default destination folder for the Export Utility definition files or reports: 1. Click Change. 2. Browse to the desired path. 3. Click OK. Click Next.
6.	Figure 5: Custom Setup Screen 	Select whether to install the <i>Metasys</i> Export Utility Scheduler feature. Click Next.

Table 1: Export Utility Software Installation Steps

7.	Figure 6: Ready to Install the Program Screen 	Click Install. The <i>Metasys</i> Export Utility installation screen indicates the status of the installation. Note: The Export Utility looks for the .NET Framework, Version 3.5 SP1, which is included on the <i>Metasys</i> Export Utility installation media.
8.	Figure 7: InstallShield Wizard Complete Screen 	Click Finish. Restart the computer. An Export Utility shortcut automatically appears on the desktop, and a Scheduler icon appears in the system tray. Note: <i>Metasys</i> Release 3.1 and later Export Utility installations automatically register the <i>MetasysExportUtility.dll</i> for use with custom programming. The batch file is included as well in case of installation failure.
9.	Done	The installation is complete. If you are upgrading Export Utility, see Deleting Leftover Microsoft Excel Files (Upgrade Only). Otherwise, go to Activating the Export Utility License, and then refer to the Export Utility <i>Help</i> for information on using Export Utility to create and schedule data extracts to software applications.

Upgrading Export Utility

Note: To upgrade the Export Utility, you must uninstall the current version of the software and then install the new version.

Table 2: Export Utility Software Upgrade Steps

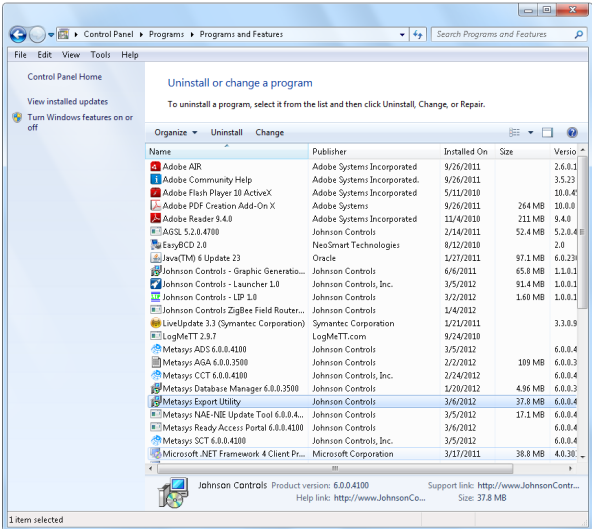
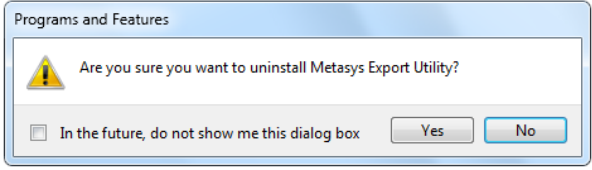
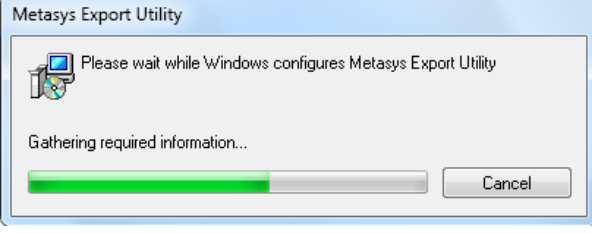
1.	Start	If the <i>Metasys</i> Export Utility Schedule Controller icon is visible in the Windows taskbar, right-click the icon  and click Exit .
2.	Figure 8: Add or Remove Programs 	Uninstall Export Utility using the Control Panel > Programs and Features feature. - Click Metasys Export Utility in the Uninstall or change a program list. - Click Uninstall. Note: Alternatively, you can uninstall Export Utility by inserting the Export Utility product disk. To uninstall Export Utility using the product disk, insert the disk and follow these steps: - Using Microsoft Windows Explorer, browse to the Export Utility folder. - Double-click setup.exe. - Follow the prompts to remove Export Utility from your computer. Note: You receive the same question boxes as in Step 5 through Step 8 in this table. Follow the same instructions as in Step 5 through Step 8 to uninstall Export Utility properly for upgrading.
3.	Figure 9: Confirmation Dialog Box 	Click Yes .
4.	Figure 10: Uninstallation Progress Indicator 	A Windows progress indicator displays progress during the uninstall process. The progress indicator remains until the Export Utility is removed.

Table 2: Export Utility Software Upgrade Steps

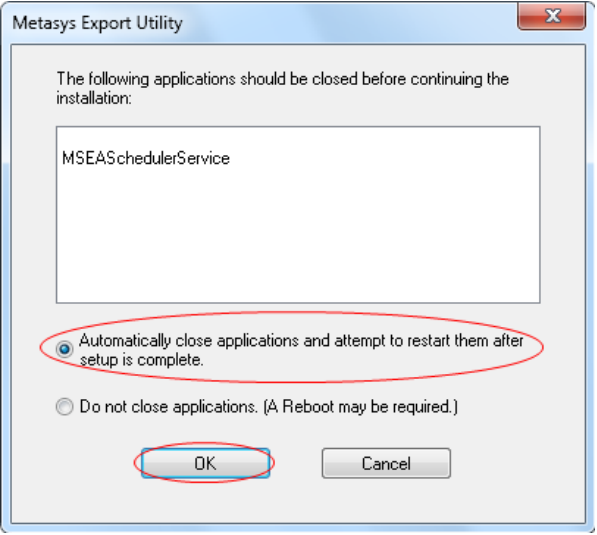
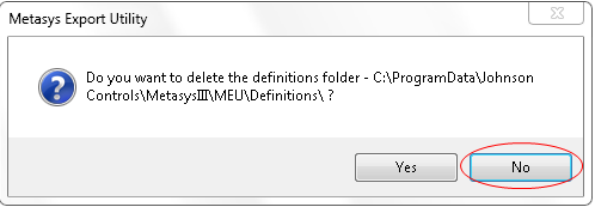
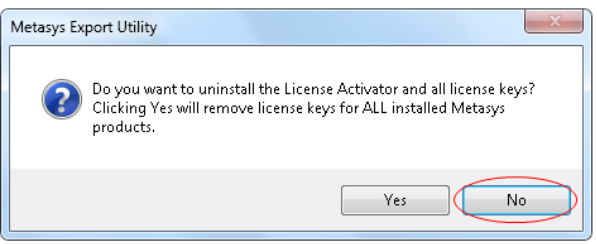
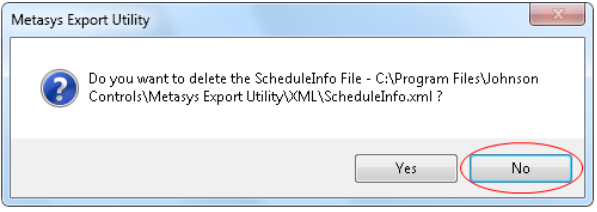
5.	Figure 11: Files In Use Screen 	Several question boxes appear, depending on your configuration. Click Automatically close applications and attempt to restart after setup is complete. Click OK. Note: Following this step, a series of dialog boxes appears. Any of these dialog boxes may appear behind the uninstallation progress indicator. If this happens, move the progress indicator to make a selection in the dialog box. If you do not move the progress bar so that you can make a selection, you cannot continue uninstalling.
6.	Figure 12: Definitions Folder Dialog Box 	A dialog box to delete the definitions folder appears. Click No.
7.	Figure 13: License Activator and License Keys Dialog Box 	A dialog box to uninstall the License Activator appears. Click No.
8.	Figure 14: ScheduleInfo File Dialog Box 	A dialog box to delete the ScheduleInfo file appears. Click No.

Table 2: Export Utility Software Upgrade Steps

9.		The progress indicator disappears when the uninstallation is complete. Note: You do not receive a confirmation that the uninstallation was successful. However, the Export Utility icons and shortcuts disappear from your desktop and startup menu.
10.	Done	Restart the computer. The Export Utility is now uninstalled. Go to Installing Export Utility and install the new version of the software.

Deleting Leftover Microsoft Excel Files (Upgrade Only)

If you have Microsoft Excel installed and you upgrade Export Utility, complete the following steps after upgrading the Export Utility software:

1. Use Windows Explorer to **browse to each of the folders** in the left column of [Table 3](#) and **delete the files** that appear in the right column.

Table 3: Files To Delete

In this Folder: ¹	Delete these Files:
In 64-bit operating systems: • C:\Program Files (x86)\Microsoft Office\Office • C:\Program Files (x86)\Microsoft Office\Office9 • C:\Program Files (x86)\Microsoft Office\OFFICE10 • C:\Program Files (x86)\Microsoft Office\OFFICE11 • C:\Program Files (x86)\Microsoft Office\OFFICE12 • C:\Program Files (x86)\Microsoft Office\OFFICE14 • C:\Program Files (x86)\Microsoft Office\OFFICE15 In 32-bit operating systems: • C:\Program Files\Microsoft Office\Office • C:\Program Files\Microsoft Office\Office9 • C:\Program Files\Microsoft Office\OFFICE10 • C:\Program Files\Microsoft Office\OFFICE11 • C:\Program Files\Microsoft Office\OFFICE12 • C:\Program Files\Microsoft Office\OFFICE14 • C:\Program Files\Microsoft Office\OFFICE15	• ErrorHandler.dll • ErrorHandler.tlb • ExportUtility.Common.dll • ExportUtility.Common.tlb • JCIExtMetasysOS.dll • JCIExtMetasysOS.tlb • MetasysMessaging.dll • MetasysMessaging.tlb • MSEAExportDLL.dll • MSEAExportDLL.tlb • Subsystems.Common.dll • Subsystems.Common.tlb • WebServices.Common.dll • WebServices.Common.tlb

¹ The path may be different if you installed Microsoft Office in an alternate location. All or none of these folders may exist. If other folders exist with similar names, delete the files in the right column from those folders, too.

2. In 64-bit operating systems, delete the **folder**: C:\Program Files (x86)\Microsoft Office\xml.
In 32-bit operating systems, delete the **folder**: C:\Program Files\Microsoft Office\xml.
3. Go to [Activating the Export Utility License](#), and then refer to the Export Utility *Help* for information on using Export Utility to create and schedule data extracts to software applications.

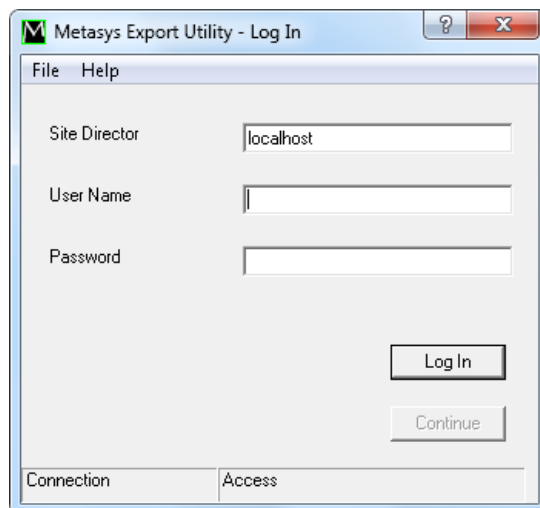
Activating the Export Utility License

To activate the license, see [Licensing](#), and refer to the *Software License Activator Technical Bulletin (LIT-1201654)*.

Starting Export Utility

To start Export Utility, double-click the Export Utility icon on your desktop; or from the Start menu, click **Programs > Johnson Controls > Metasys > Metasys Export Utility**. The *Metasys Export Utility - Log In* dialog box appears ([Figure 15](#)).

Figure 15: Metasys Export Utility - Log In Dialog Box



Note: Press **F1**, or click **Help** in the Help menu, to access *Metasys Export Utility Help* for details on logging in to and using *Metasys Export Utility*.

Troubleshooting

See [Table 4](#) and the following section for troubleshooting information.

Table 4: Troubleshooting

Problem	Solution
An error message appears stating that the application failed to create the Excel output file.	In this case, Microsoft Excel cannot open or save any more documents because there is not enough available memory or disk space. This scenario occurs when using a virtual machine setup. To work around this issue, use On Demand Export instead of MSEASchedulerService. You can also free up memory and disk space by doing the following: • To make more memory available, close workbooks or programs you no longer need. • To free disk space, delete files you no longer need from the disk to which you are saving Excel reports.

Specifying the Set Service Login Properties

You can activate the Set Service Login feature by adjusting the parameters of the Windows OS service called **MSEASchedulerService**.

To specify the Set Service Login properties:

1. In Control Panel, double-click **Administrative Tools**.
2. Double-click **Services**. The Services screen appears.
3. In the Name column, right-click **MSEASchedulerService** and then click **Stop**.

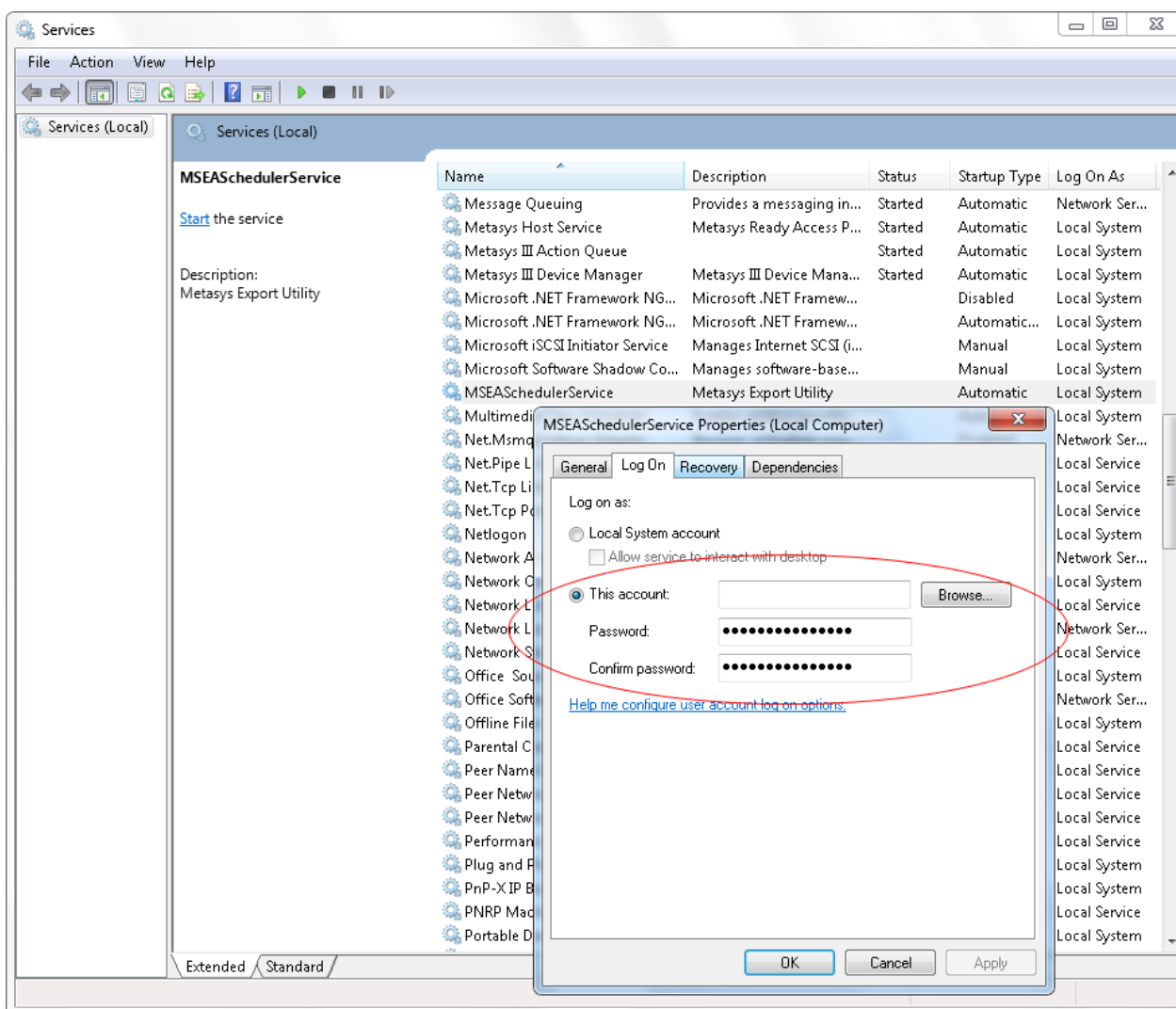
Note: To see the user under which the service is currently running, look in the right-most column (Log On As). Local System, Local Service, and Network System are standard Windows OS accounts.

4. Double-click **MSEASchedulerService**. The MSEASchedulerService Properties dialog box appears (*Figure 16*).
5. On the Log On tab, click to select **This Account**.
6. Enter your Windows operating system user name.

Note: If the Network directory is located on a different domain, enter the domain name followed by your Windows operating system user name (for example, Workgroup\Admin).

7. Enter and confirm your Windows operating system password.
8. Click **OK** and close the Services screen.

Figure 16: MSEASchedulerService Properties Dialog Box



9. Right-click **MSEASchedulerService** and then click **Start** in the pop-up menu.

Related Documentation

The following table lists documentation related to the Export Utility.

Table 5: Related Documentation

For Information On	See Document
Metasys System Requirements	<i>Metasys® System Configuration Guide (LIT-12011832)</i>
ADS/ADX Installation	<i>Metasys® Server Installation and Upgrade Instructions Wizard (LIT-12012162)</i>
SCT Installation	<i>SCT Installation and Upgrade Instructions (LIT-12012067)</i>
ADS-Lite Installation	<i>Metasys® Server Lite Installation and Upgrade Instructions Wizard (LIT-12012258)</i>
Open Data Server System (ODS) Installation	<i>ODS Installation and Upgrade Instructions Wizard (LIT-12011945)</i>
Trends	<i>Trend Extensions section of the Metasys® SMP Help (LIT-1201793)</i>
Alarms	<i>Alarm and Event Management section of the Metasys® SMP Help (LIT-1201793)</i>
Audits	<i>Audit Trail section of the Metasys® SMP Help (LIT-1201793)</i>
How to Extract Data in Multiple Formats	<i>Metasys® Export Utility Help (LIT-1201952)</i>
Software License Activation	<i>Software License Activator Technical Bulletin (LIT-1201654)</i>

Technical Specifications

Table 6: Export Utility System Requirements

Product Code	MS-EXPORT-0
Recommended Computer/Server Platform¹	Intel® Core® 2 Duo E6700 or better (Intel Core 2 Duo E4300 minimum) 20 GB free hard disk space available (600 MB minimum) DVD drive When Export Utility is installed on an ADS/ADX or ODS, follow the requirements for an ADS/ADX. Refer to the <i>Application and Data Server (ADS) and Extended Application and Data Server (ADX) Product Bulletin (LIT-1201525)</i>, the <i>Application and Data Server (ADS) Lite-E Product Bulletin (LIT-12011690)</i>, or the <i>Application and Data Server (ADS) Lite-A Product Bulletin (LIT-12011694)</i>. When Export Utility is installed on an Open Data Server (ODS), follow the requirements for an ODS. Refer to the <i>Open Data Server Product Bulletin (LIT-12011943)</i>.
Recommended Memory¹	Computer Platforms: 2 GB RAM (1 GB RAM minimum) Server Platforms: 4 GB RAM (2 GB RAM minimum)
Supported Operating Systems	Windows® 10 Pro and Enterprise Editions with Anniversary Update (version 1607) (64-bit) Note: The Windows 10 Anniversary Update (version 1607) is required for any Windows 10 computer that runs <i>Metasys</i> software, including the ADS/ADX/ODS. Verify this update is installed before installing or upgrading <i>Metasys</i> software. From the Start Menu, type Winver in the Windows search bar. Click Winver to open About Windows. If you are upgrading <i>Metasys</i> software before installing this update, you must do the following: 1. uninstall the previous versions of all <i>Metasys</i> software 2. install the Windows 10 Anniversary Update (version 1607) 3. install the latest <i>Metasys</i> software Windows® 8.1 Pro and Enterprise Editions with Update 1 (64-bit) Windows® 7 Professional, Enterprise, and Ultimate Editions with SP1 (64-bit) Windows® 7 Professional, Enterprise, and Ultimate Editions with SP1 (32-bit) Windows® Server® 2016 (64-bit) Windows® Server® 2012 R2 with Update 1 (64-bit) Windows® Server® 2012 (64-bit)
Additional Software Included on the Product Disks	Microsoft .NET Framework version 3.5 SP1 For steps on installing .NET Framework, refer to the <i>Metasys® Server Installation and Upgrade Instructions Wizard (LIT-12012162)</i>, <i>Metasys® Server Lite Installation and Upgrade Instructions Wizard (LIT-12012258)</i>, or the <i>ODS Installation and Upgrade Instructions Wizard (LIT-12011945)</i>. Note: The Windows 10, Windows 8.1, Windows 7, Windows Server 2016, Windows Server 2012 R2 with Update 1, and Windows Server 2012 operating systems include Microsoft .NET Framework version 3.5/3.5.1. These applications are built into the operating system (no separate software installation is necessary). We recommend you also install Microsoft .NET Framework version 4.5 if you are using Windows 8.1, Windows Server 2012 R2, or Windows Server 2012 and Microsoft .NET Framework version 4.6 if you are using Windows 10.
Additional Requirements (Order Separately)	Microsoft Office Professional 2013, Microsoft Office 365®, Microsoft Office Professional 2007, or Microsoft Office Professional 2010 software to generate reports Note: To extract data to Microsoft Excel or Microsoft Access software, you must have the software installed on the computer that is running the Export Utility.

¹ Our computer platform and memory recommendations are not meant to imply that older or slower machines are not usable. Refer to the *Network and IT Guidance Technical Bulletin (LIT-12011279)* for more information regarding computer or server recommendations.



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