

EFI Metrix Tech Note:  
Remote Auto Plan Deployment Guide

Version 21.1

## Remote Auto Plan: Configuring Database Connection Defaults

### *What it Is*

Remote Auto Plan allows the user to submit Metrix projects to an automated server component that performs Auto Plan calculations, thereby reducing CPU consumption on client workstations. Remote Auto Plan supports all Metrix database formats, with the exception of hypersonic single-instance (embedded) databases.

### *How it Works*

#### **Initial Setup:**

##### **Metrix Automation Server Machine**

1. Using a text editor such as Notepad, open the Metrix client's "metrix.properties" file that is in the C:\ProgramData\EFI\Metrix folder.
2. Add the following lines:  
remoteAutoPlanEnabled=true  
workbench.url=<http://host:8081>  
workbench.user=\*\*\*  
workbench.password=\*\*\*\*
3. Save the file.
4. Place the "DBList.xml" file in the same directory as the "metrix.properties". For additional information regarding DBList.xml, see the Database Picker documentation.
5. All workstations or terminal server users must be able to access the network path to the input hot folder, so enable sharing for "serverHotFolderRoot" (C:\ProgramData\EFI\Metrix\serverHotFolderRoot). Do not rename this folder.

##### **Metrix Client Machines**

### *Windows*

1. Using a text editor such as Notepad, open the Metrix client's "metrix.properties" file (C:\ProgramData\EFI\Metrix folder\metrix.properties).
  2. Add the following lines:  
remoteAutoPlanEnabled=true  
workbench.url=<http://host:8081>  
workbench.user=\*\*\*  
workbench.password=\*\*\*\*
  3. Save the file.
  4. Place the "DBList.xml" file in the same directory as the "metrix.properties" file.
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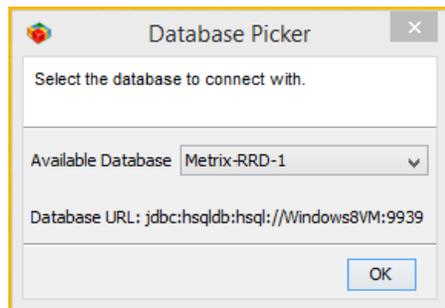
### Macintosh

1. Using a text editor such as Text Edit, open the Metrix client's "metrix.properties" file that is in the Applications/EFI/Metrix folder.
2. Add the following lines:  
remoteAutoPlanEnabled=true  
workbench.url=<http://host:8081>  
workbench.user=\*\*\*  
workbench.password=\*\*\*\*
3. Save the file.
4. Place the "DBList.xml" file in the same folder as the "metrix.properties" file.
5. Mount the serverHotFolderRoot folder that is on the machine running Automation Server.

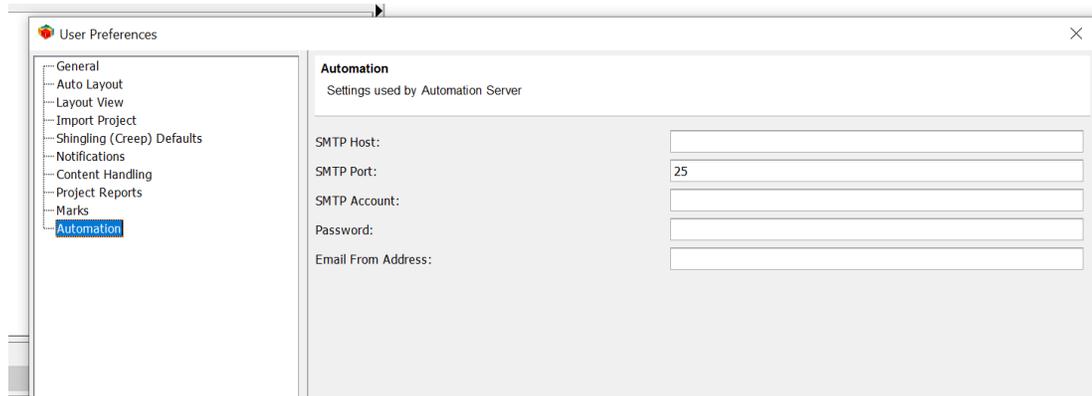
### Using Remote Auto Plan

Once the property remoteAutoPlanEnabled=true is set for Metrix Automation Server, it will run as a headless (background) process, logging in automatically, loading the commands, and using the first database in DBList.xml as the configured database.

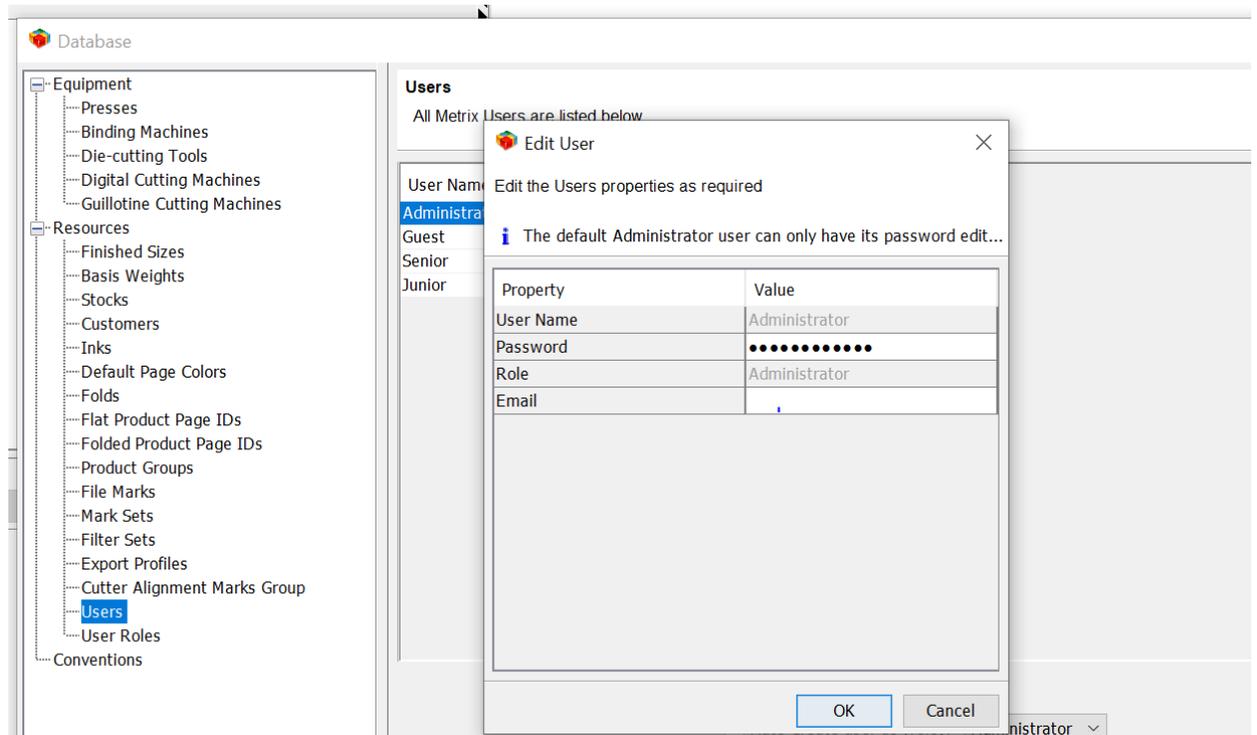
1. Launch Metrix client.
2. The Database Picker dialog opens. From the Available Databases menu, select the first database in the list and then click **OK**.



3. Go to User Preferences > Automation and enter the Metrix Automation Server email configuration details.



4. Enter the email information for the Administrator and Senior users and then exit User Preferences.



5. Launch Metrix Automation Server. Automation Server starts as headless task, automatically reads the DBList.xml file, loads the first database in the list, and creates and loads a commands file. This file resides at C:\ProgramData\EFI\Metrix\remoteAutoplanCommands\RemoteAutoplanCommand.s.mxml. An email is sent to notify the Administrator and Senior users that Metrix Automation Server is starting.
6. In Metrix client, select Auto Plan for a project, configure the settings, and then click **Submit**. Metrix sends the project to Automation Server, which processes the project and saves it to the selected database. Automation Server sends an email to notify the Metrix client user that the project has been planned.

## **Remote Auto Plan and Automation Lite**

A Metrix instance that is configured to use Remote Auto Plan cannot also run as an Automation Lite instance. A Metrix instance that is not configured to use Remote Auto Plan can run as an Automation Lite instance. Any Metrix instance, whether or not it is configured to use Remote Auto Plan, can submit via Automate to an Automation Lite instance.