

Chimpegration Scheduler

▶ development@zeidman.info





UK: 020 3637 0080

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Introduction

With the optional Chimpegration Scheduler module it is now possible to setup campaign management processes to run according to a schedule without any user interaction.

This document gives you an overview of setting up and running a scheduled process. It assumes that you have Chimpegration installed as a plug-in to The Raiser's Edge. You will use the plug-in to do the initial setup of the scheduled process.



Installation

Insure that the regular Chimpegration plug-in has been installed on the machine that you wish to schedule imports.

Run the *Chimpegration Scheduler Setup.exe* file from the Chimpegration Scheduler folder of the downloaded zip file. This wizard will take you through the very basic steps of installing the application.

Add Raiser's Edge login details

As part of the installation process you should set up the Raiser's Edge account that will be used to run the campaign management process. This can be any Raiser's Edge user as long as they have the right to update records and perform the same campaign management process that you would otherwise do manually.

This is entered below. Note that currently you will see the list of databases available but on selecting the database it will be converted to a number. This is a limitation of the installer software which we hope to remedy in the near future.

闄 Chimpegration Schee	luler Setup	×
Raiser's Edge Credential Select the database t	s o connect to and enter the user name and password	2
RE Database	50 ~	
Username	Supervisor	
Password	•••••	
Confirm Password	•••••	
Advanced Installer		
	< Back Next >	Cancel



Setup Email

You may also want to specify an email address setup in order to send any error messages by email. Note that this email will only be sent if there are errors in the process. (All scheduled processes will be recorded in the log file which is set up in the next step)

Chimpegration Scheduler Setup								
Error Email Settings								
Please configure the email settings for	when an error occurs							
Send Error Email?								
SMTP Host:								
smtp.gmail.com								
Enable SSL?	Port Number:							
From Email Address	To Email Address							
example@gmail.com	example@gmail.com							
Username example@gmail.com	Password							
Advanced Installer								
	< Back Next >	Cancel						

Setup Log file location

The scheduled process writes success and failure statuses to a log file. This is entirely separate from the process control report. It only stores information about the process. Set up the location to store the log file.



Chimpegration Scheduler Setup Error Log Location		×
Enter the location of the error log		
<u>F</u> older: D:\Projects\Common Files\		Browse
Advanced Installer	< Back Next :	> Cancel

All of these settings can be found in a configuration file and can be update there is the need should arise.

This is found in the installation folder under a file called:

ChimpegrationApp.exe.config

It can be edited in any text editor.

Setup

Each scheduled process needs to have a campaign management settings file associated with it. It does this in the form of command line parameters. There is currently only one parameter as follows:



Short form	Long form	Usage	Example
-S	-settings	The saved data source settings file	-s "D:\scheduled\import.xml"

If you run the application without any parameters it will write a usage note to the error log file assuming the error log has been setup correctly.

Performing a Test Run

We will now use the command line parameter to perform a test run of the noninteractive process.

Create a desktop shortcut pointing to the ChimpegrationApp.exe file. By default this is located in the following folder:

C:\Program Files (x86)\Zeidman Development\Chimpegration Scheduler

(C:\Program Files\Zeidman Development\Chimpegration Scheduler - for 32bit environments)



		\times
~	∡ Create Shortcut	
	What item would you like to create a shortcut for?	
	This wizard helps you to create shortcuts to local or network programs, files, folders, computers or Internet addresses.	
	Type the location of the item:	
	\Zeidman Development\Chimpegration Scheduler\ChimpegrationApp.exe" Browse	
	Click Next to continue.	
	Next Cance	I

Right click on the shortcut and select properties



💭 Chimpegratio	nApp Properties			×				
			-					
Compatibility	Security	Details	Previous	Versions				
General Short	cut Options	Font	Layout	Colours				
Chimpegration App								
Target type:	pplication							
Target location: (Chimpegration Sch	eduler						
Target:	Chimpegration Scl	neduler\Chim	pegrationApp	o.exe"				
Start in:	"C:\Program Files	(x86)\Zeidma	an Developm	ent\Cl				
Shortcut key:	None							
Run:	Normal window			\sim				
Comment:								
Open File Location Change Icon Advanced								
	ОК	Ca	ancel	Apply				

Paste the command line parameters in after the value in the target as shown below:

 o	nimpegration App
Target type:	Application
Target location	Chimpegration Scheduler
Target:	mApp.exe" -s "D:\scheduled\Newsletter List xml"
Start in:	"C:\Program Files (x86)\Zeidman Development\Cl
CL + +++	A.



Now when you start the application using the shortcut it will run a non-interactive process. Check the control report to see if it was successful and the error logs to see if there were any specific errors.



Scheduling

In order to schedule an import you need to use Windows scheduler. This can be started by going to the run window by pressing the Windows Key + R

Enter *Taskschd.msc* in the Run window as shown below.

💷 Run	×
0	Type the name of a program, folder, document or Internet resource, and Windows will open it for you.
<u>O</u> pen:	Taskschd.msc \checkmark
	OK Cancel <u>B</u> rowse

In the right hand pane under Actions select Create Task. You should create a task for each import that you want to run. Each task should have different command line parameters depending on the data source, data source settings and template used.

Add a name and optionally a description for the scheduled task. Select a user to run the task as. When running on a network it is advisable to run as a user that does not need to be logged into the machine.



🕒 Create Task			×						
General Trigg	Jers Actions Condi	tions Settings							
Name: Chimpegration Scheduler - Newletter List									
Location:	N .								
Author:	ZEIDDEV1\David Zeid	lman1							
Description:									
-Security opti	ons								
When runni	ng the task, use the fo	llowing user account:							
NT AUTHO	RITY\NETWORK SERV	CE Change User or Group							
Run only	when user is logged	on							
O Run whe	ther user is logged on	or not							
🗌 Do n	ot store password. Th	e task will only have access to local computer resources.							
Run with	highest privileges								
Hidden	Configure for:	Windows Vista™, Windows Server™ 2008	~						
		OK Cancel							

Press on the Triggers tab and select new. Enter how often you would like the process to run and when. When deciding at what time the process should run, you should take into consideration any night-time backups or network activity that may affect the process.



Create Ta	isk			×	
General Ti When you	riggers u create	Actions a task, yo	Conditions u can specify	Settings the conditions that will trigger the task.	
Trigger		De	tails	Status	
		New	Trigger		>
		Beg - Sei (((in the task: ttings One time Daily Weekly Monthly	On a schedule	5
New		E Ad	lvanced settir	igs	
] Delay task f	or up to (random delay): 1 hour 🗸	
] Repeat task	every: 1 hour v for a duration of: 1 day v	
			Stop task if	ill running tasks at end of repetition duration	
			Expire: 05/	01/2017 V 12:04:14 Synchronize across time zones	
				OK Cance	:1

Press OK to add the trigger

Select the Actions tab and press New.

Enter the program location and the command line parameters as set up previously.



🕒 Create	Task						>	<	Disp Enat	lay All Running Task de All Tasks History
General	Triggers	Actions	Conditions	Settings					AT S	ervice Account Conf
When	vou create a	a task. vo	u must specif	v the action that w	ill occur wł	hen vour task starts.			View	/
	,			·		,		Q	Refr	esh
Action	ו	Det	ails					?	Help	,
					New Actio	on				×
					You mus	st specify what action this	task will perforn	n.		
					Action:	Start a program				~
					Setting	s				
					Progra	am/script:				
					ment	Chimpegration Scheduler	\Chimpegratior	App.	exe"	Browse
					Add a	rguments (optional):		ŀs	"D:\sc	heduled\Newsle
Nev	N	Edit	Delet	e	Start i	n (optional):				
	Next Run	Time	Trig	Igers						
eUA	04/07/201	6 13:20:0	0 At (01:20 every day - A						
1797327	04/07/201	6 13:41:0	0 At (04:41 every day - A						
-5-21-1	04/07/201	6 13:46:0	0 At (00:46 every day - A						
1797327	04/07/201	6 14:27:0	0 At ()4:27 every day - A						
	04/07/201	6 18:16:4	1 Mu	ltiple triggers defir						
7510	04/07/201	6 18:00:0	D At(00:00 on 02/01/200						
								0	,	Cancel

Press OK to add the action

Complete any other values on the conditions or settings tabs as necessary and press OK to save the scheduled task.

