

Chimpegration Scheduler

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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

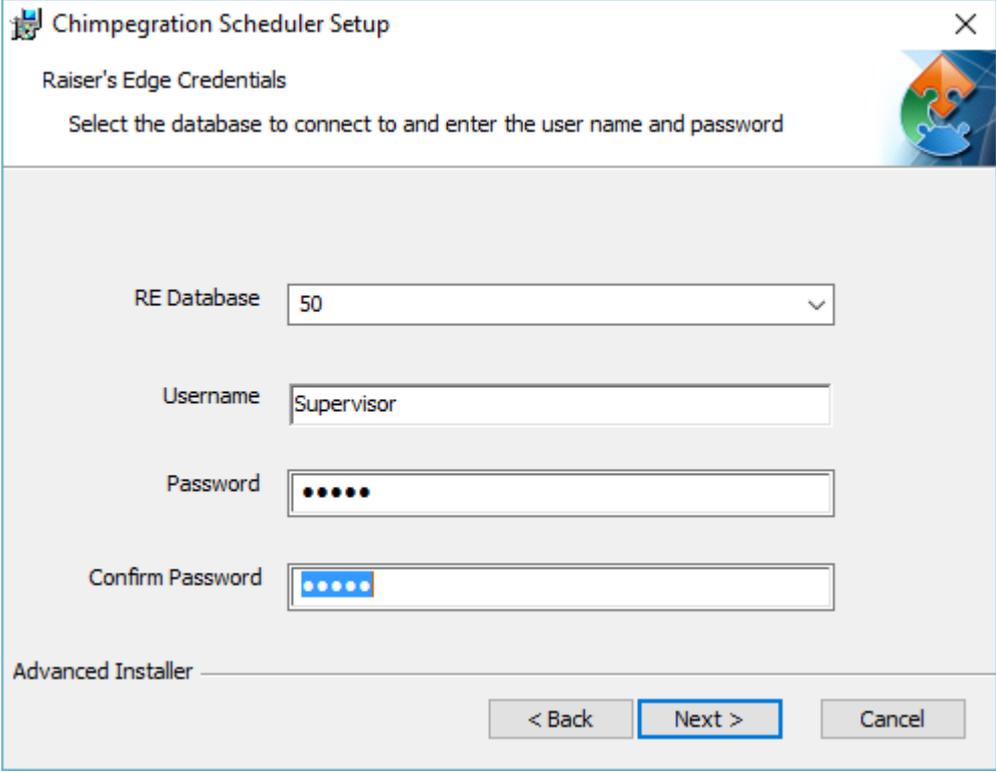
Insure that the regular Chimpegration plug-in has been installed on the machine that you wish to schedule imports.

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.

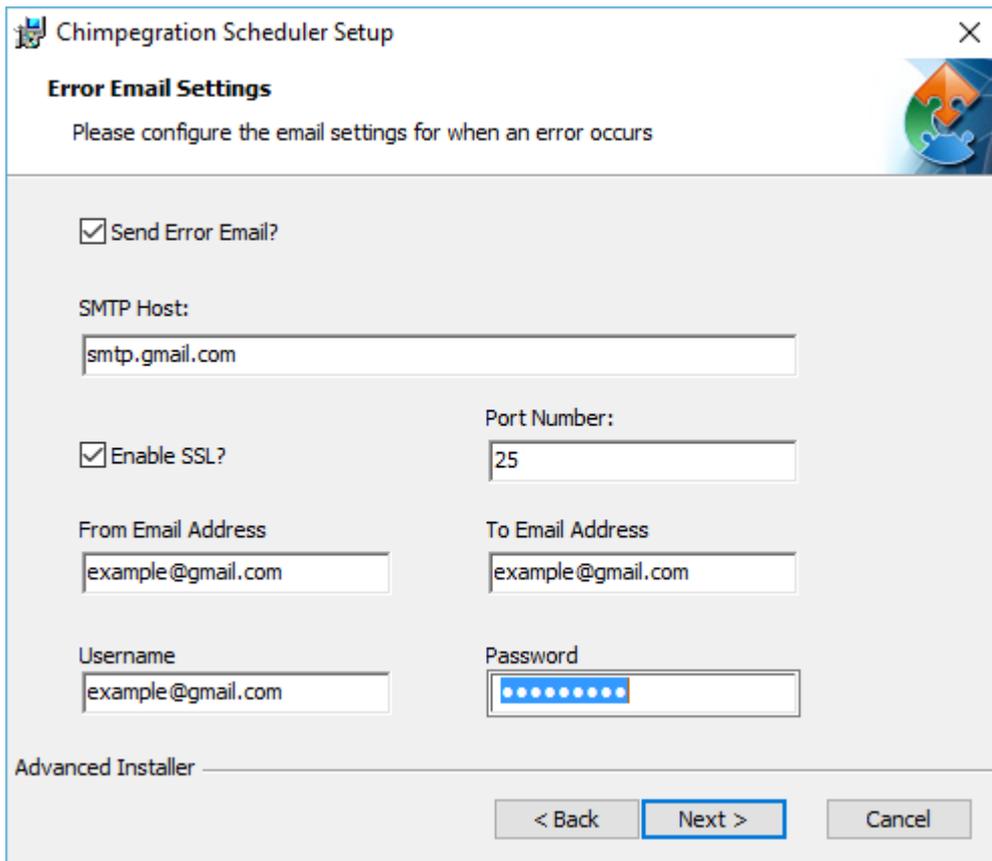


The screenshot shows a Windows-style dialog box titled "Chimpegration Scheduler Setup". The main heading is "Raiser's Edge Credentials" with a sub-instruction: "Select the database to connect to and enter the user name and password". The dialog contains four input fields: "RE Database" (a dropdown menu showing "50"), "Username" (text input with "Supervisor"), "Password" (password input with six black dots), and "Confirm Password" (password input with six blue dots). At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel". The text "Advanced Installer" is visible in the bottom left corner of the dialog area.



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)



The screenshot shows a Windows-style dialog box titled "Chimpegration Scheduler Setup" with a close button (X) in the top right corner. The main heading is "Error Email Settings" and the instruction below it says "Please configure the email settings for when an error occurs". There is a small puzzle piece icon in the top right of the dialog. The settings are as follows:

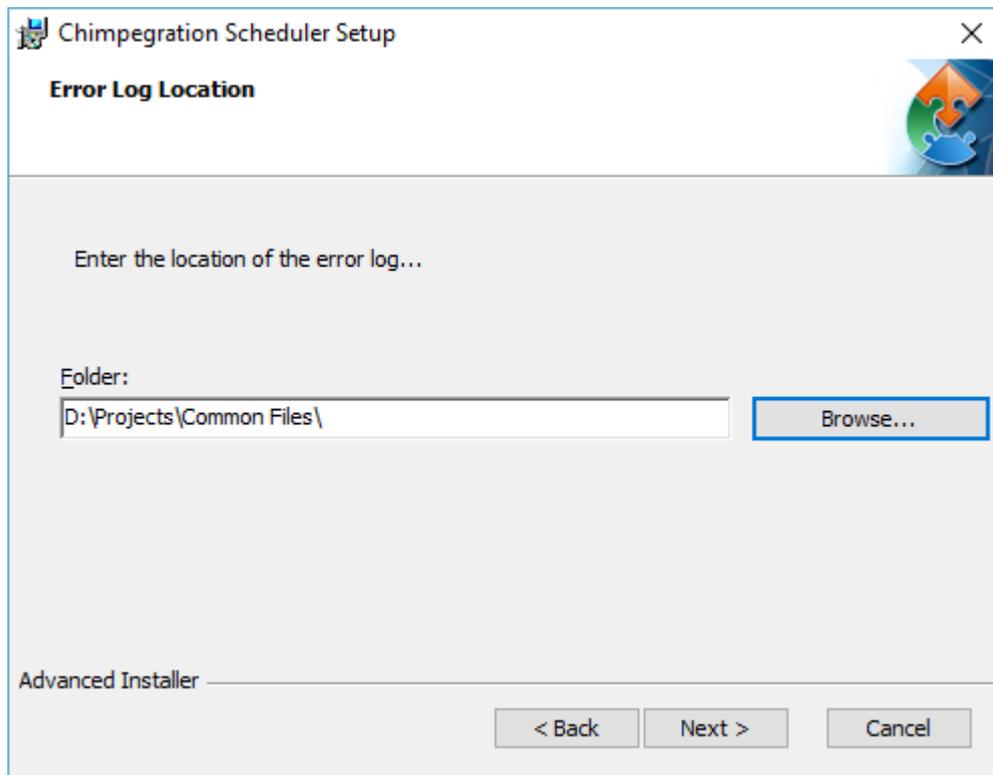
- Send Error Email?
- SMTP Host:
- Enable SSL?
- Port Number:
- From Email Address:
- To Email Address:
- Username:
- Password:

At the bottom left, it says "Advanced Installer". At the bottom right, there are three buttons: "< Back", "Next >" (highlighted with a blue border), and "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.





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

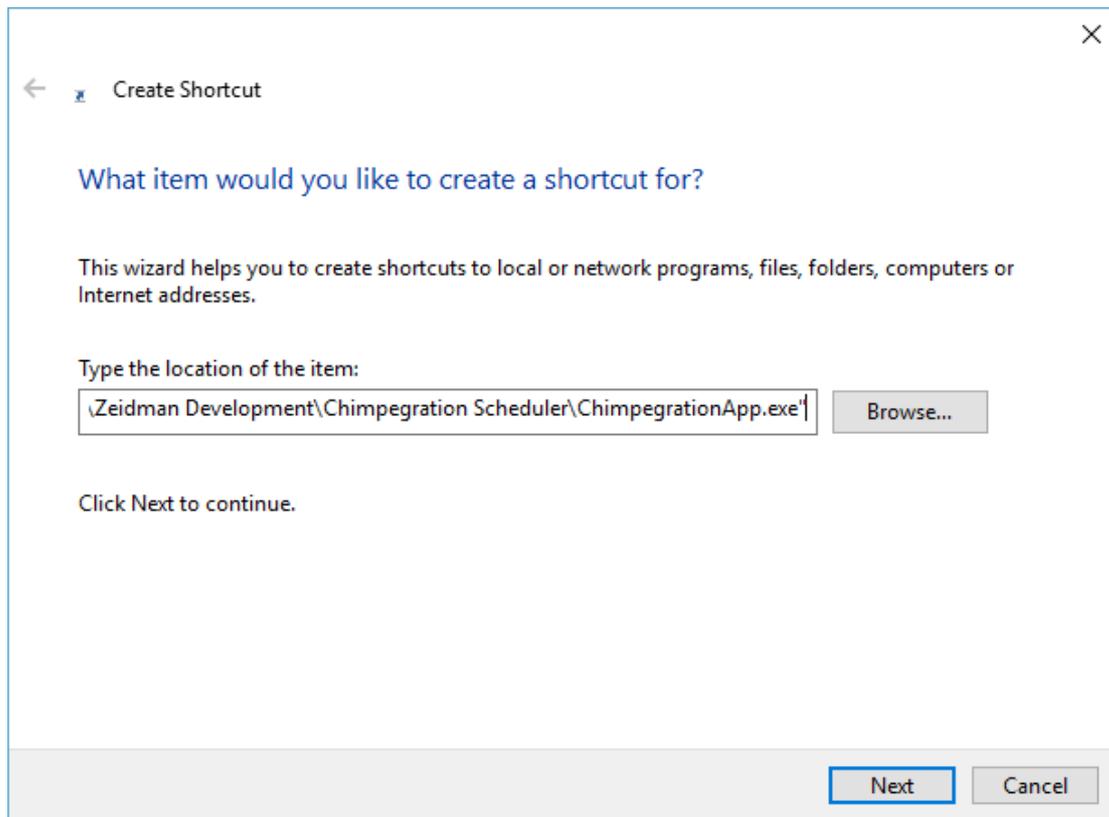
We will now use the command line parameter to perform a test run of the non-interactive process.

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

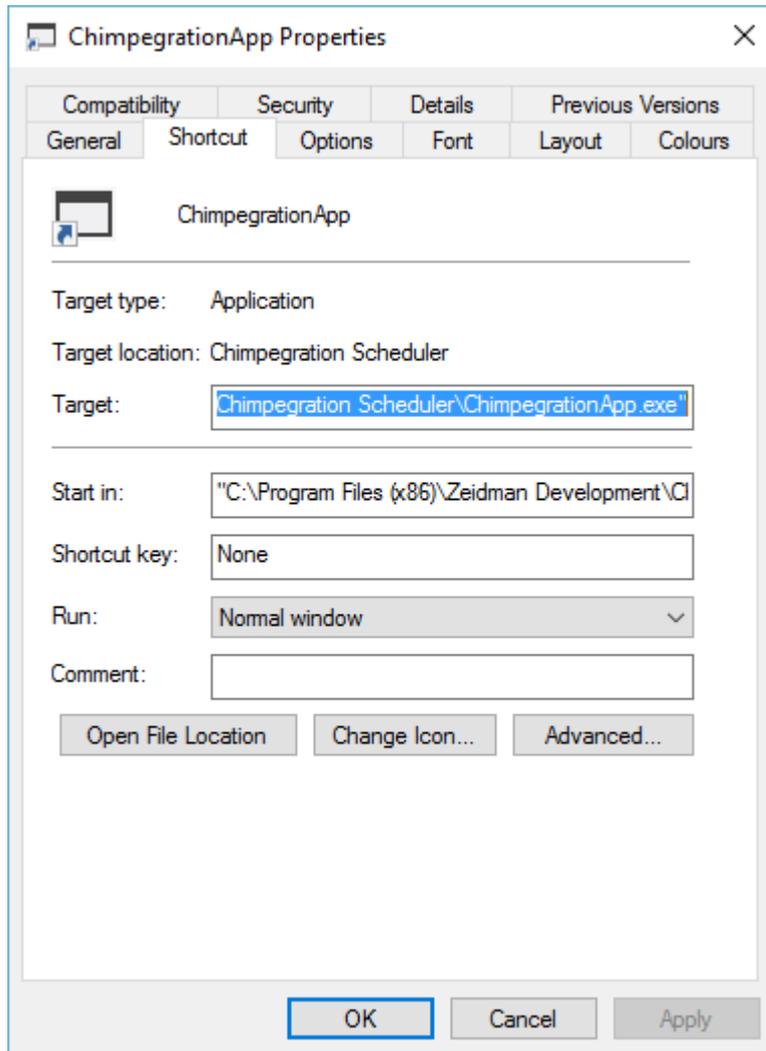
(C:\Program Files\Zeidman Development\Chimpegration Scheduler - for 32bit environments)



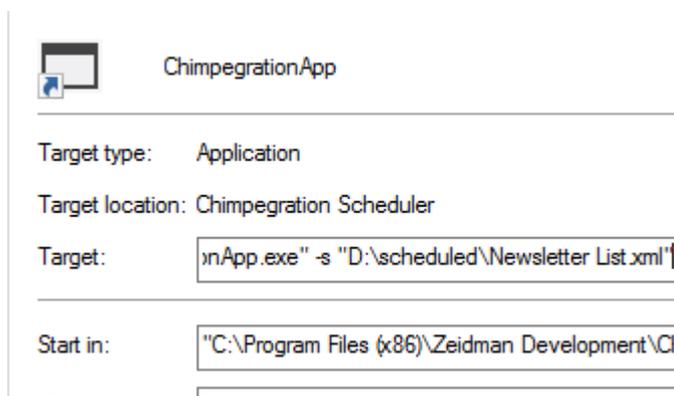


Right click on the shortcut and select properties





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



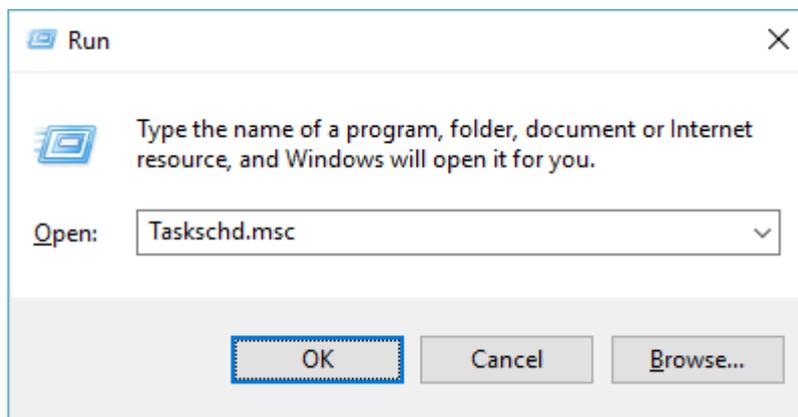
Now when you start the application using the shortcut it will run a non-interactive process. Check the control report to see if it was successful and the error logs to see if there were any specific errors.



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

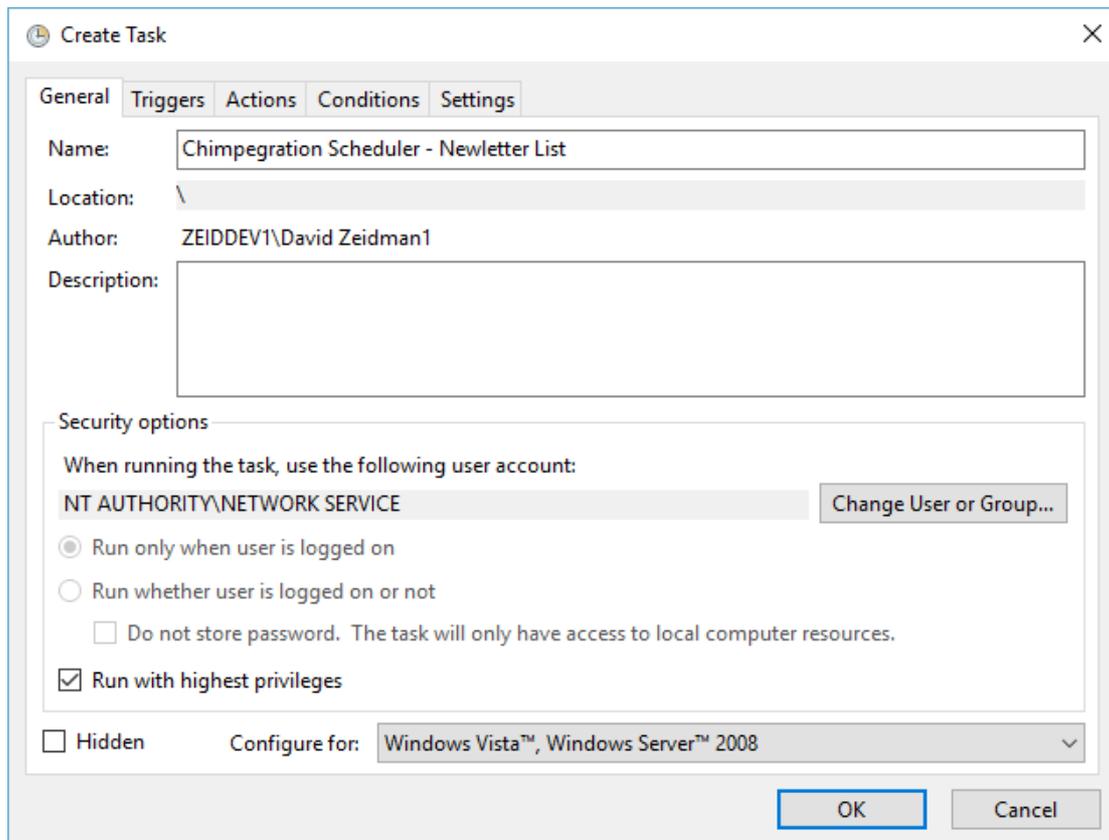
Enter *Taskschd.msc* in the Run window as shown below.



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.

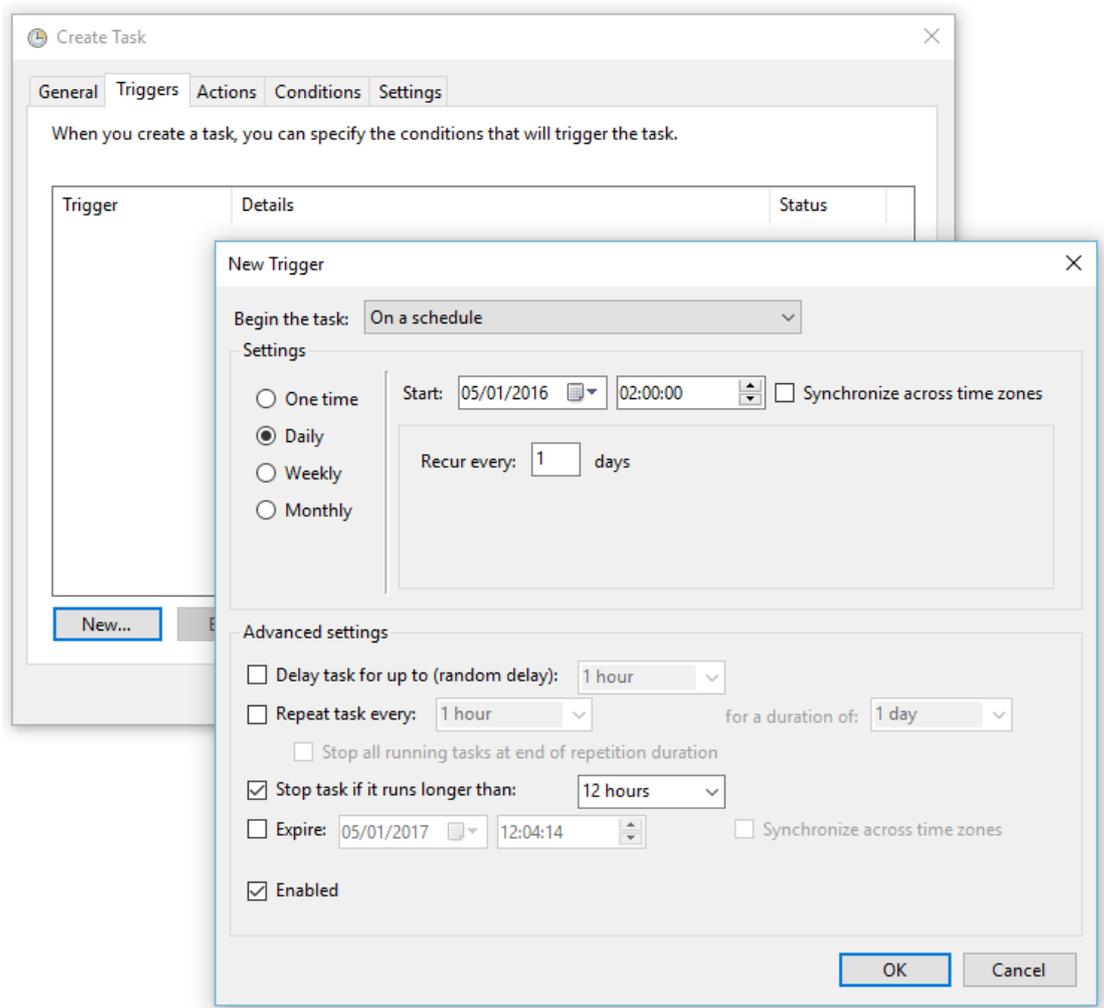
Add a name and optionally a description for the scheduled task. Select a user to run the task as. When running on a network it is advisable to run as a user that does not need to be logged into the machine.





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.



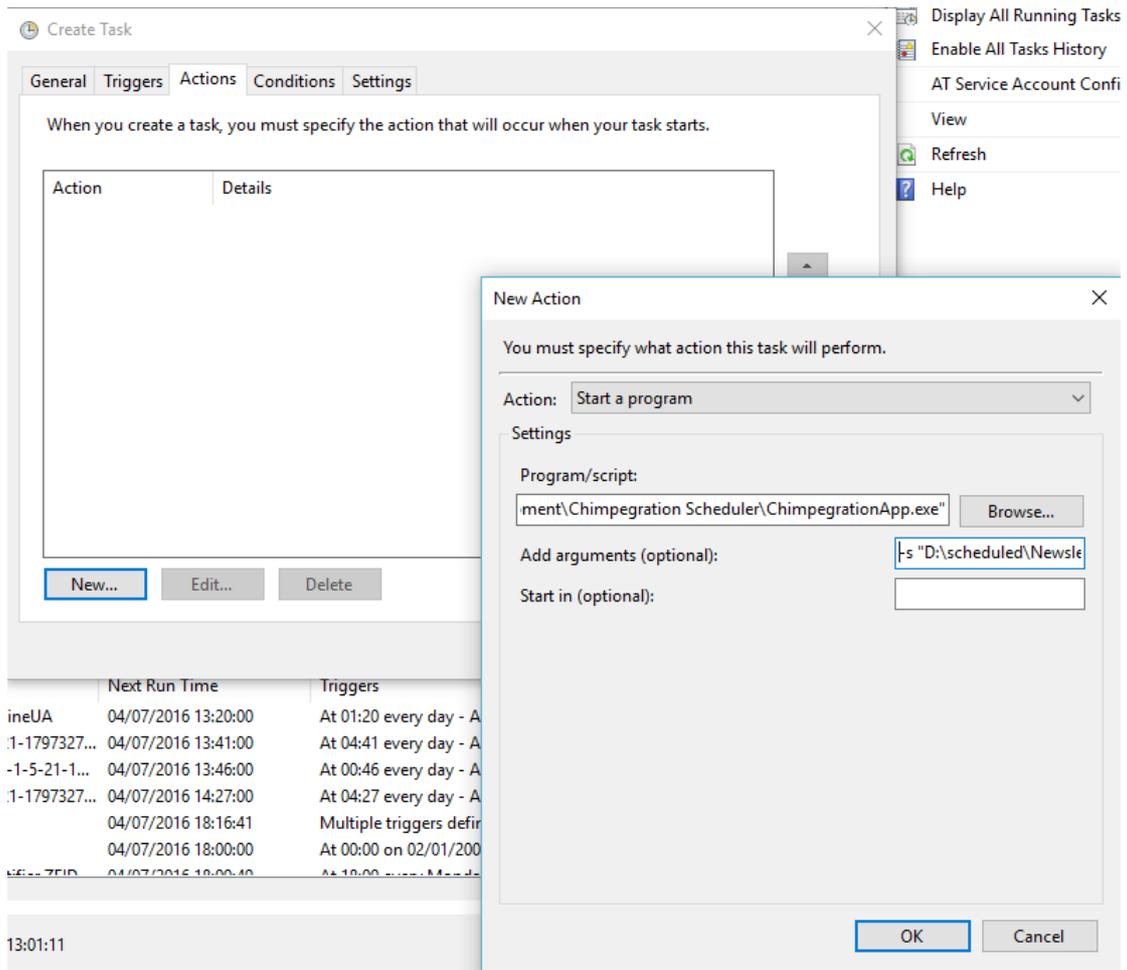


Press OK to add the trigger

Select the Actions tab and press New.

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





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.

