

CrystalKiwi Scheduler

Install Instructions for Windows Server 2008/R2

Step 1: Download

Download the three install files from www.recrystallize.com

- Dot Net 4.0
- Crystal Reports Run Time
- CrystalKiwi Scheduler

Step 2: Install using setup files

Run those setup files to install the components of the scheduler

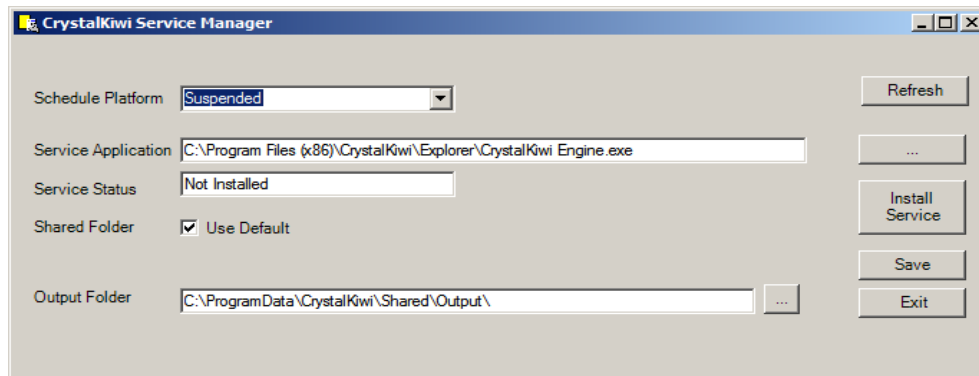
- Dot Net 4.0
- Crystal Reports Run Time
- CrystalKiwi Scheduler

If your server already has Dot Net 4.0 so that the download does not install, it is OK to proceed. A restart may be required for one or more of these installs. Plan your installation so this does not disrupt other users of your server.

At the end of this step, you should have some new menu items.

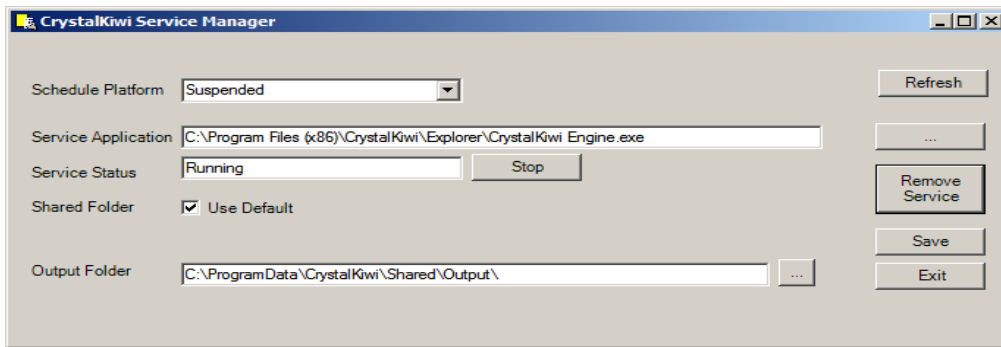
Step 3: Configure Service

Use the menu item CrystalKiwi Service Manager. This can be used at any time to install or remove the service and to set the folder locations used by the service. **You will need administrator access to use this program so when you select it, right-click and “Run as Administrator”.**



By default the schedule platform is “Suspended”. Change it to desktop to run as a desktop scheduler in a similar way to cViewMANAGER. The “Service” option will not appear until the service is installed.

To Install the service, make sure that “CrystalKiwi Engine.exe” is selected as “Service Application”. Browse to a new folder location using the “...” button, if you have installed this elsewhere, or wish to test a new version in a different folder. Click “Install Service”. The form should display a message that it is trying to start the service. You should now see..



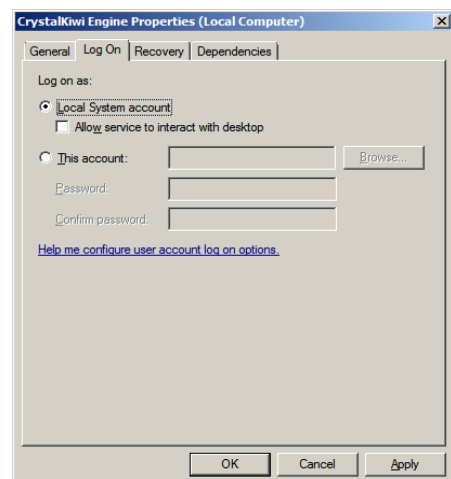
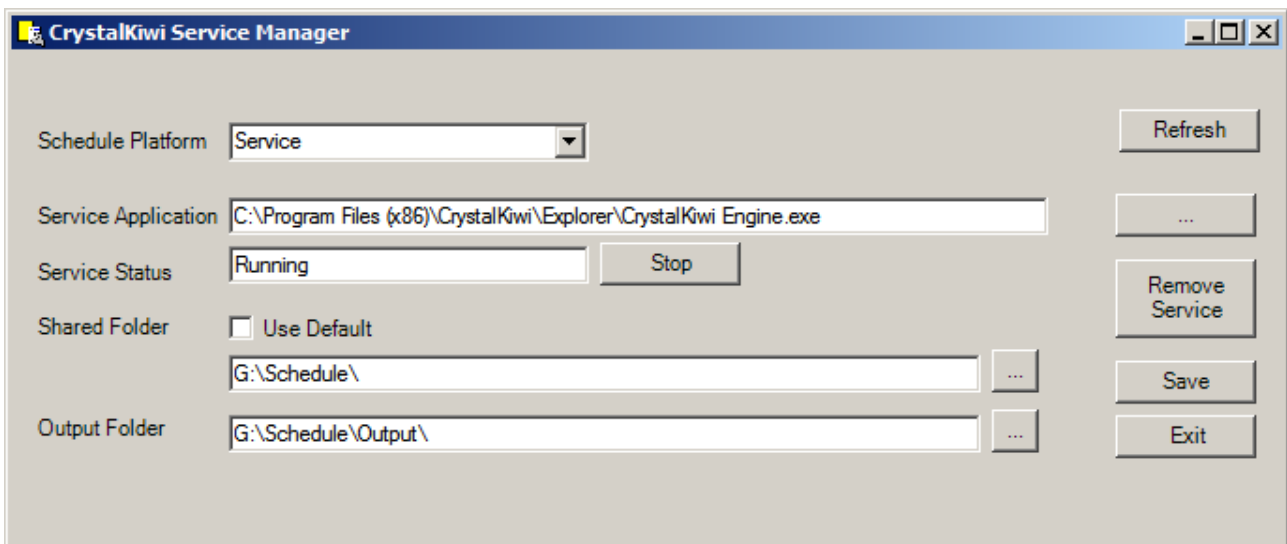
Change the Scheduler Platform to “Service” and Stop and Restart the service

Step 4 (Optional): Change Shared folder location

By Default, CrystalKiwi Scheduler saves schedule information in the C:\ProgramData\CrystalKiwi\Shared folder. This follows the Microsoft recommendations about where applications save the data used by multiple users. On some systems the security settings may have problems with this default folder so you can change this to any folder on your computer. We recommend you do NOT use a network share for this information as it needs to be on a local folder.

If you change the default folder, make sure you start and stop the service so the appropriate sub folder and files are created.

We also recommend you match the “Output Folder” to match any changes to the default shared folder.

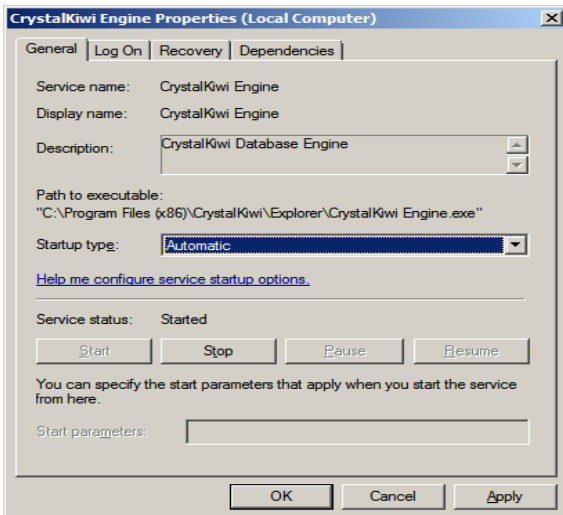


Step 5: Change Service Settings

By Default, the CrystalKiwi Engine is set to Manual and to run under the Local System Account. Use the Control Panel to change these to another account in your domain. Access this via the Control Panel/Administrative Tools

This account must have permission to access all the data sources used by the reports in your schedule.

Also remember that every time the password for that account changes, you will need to change the password for the CrystalKiwi Engine service. For that reason, it can be useful to set the account to never expire the password,



You should also change the account from Manual to Automatic. This means every time the machine restarts, the service will also restart.

Remember to "Apply" these setting changes. You might also need to stop and restart the service to apply any new Log On credentials.

Step 6: Database Client Setup

In most cases the machine you have selected to install CrystalKiwi Scheduler on will either be a new machine dedicated to report scheduling or an existing, low demand server on your network. The other tasks performed by the server may not require a connection to your database.

A report scheduler does require a connection to your database. It is impossible to refresh reports against the live data without setting this up.

This will be site specific. You might use SQL server, which has database clients built into the system, while others might use Oracle, Pervasive SQL, MySQL, DB2 or other products. Crystal can work with all of these (and many others). Your database expert will be able to tell you what database client software needs to be installed on this machine.

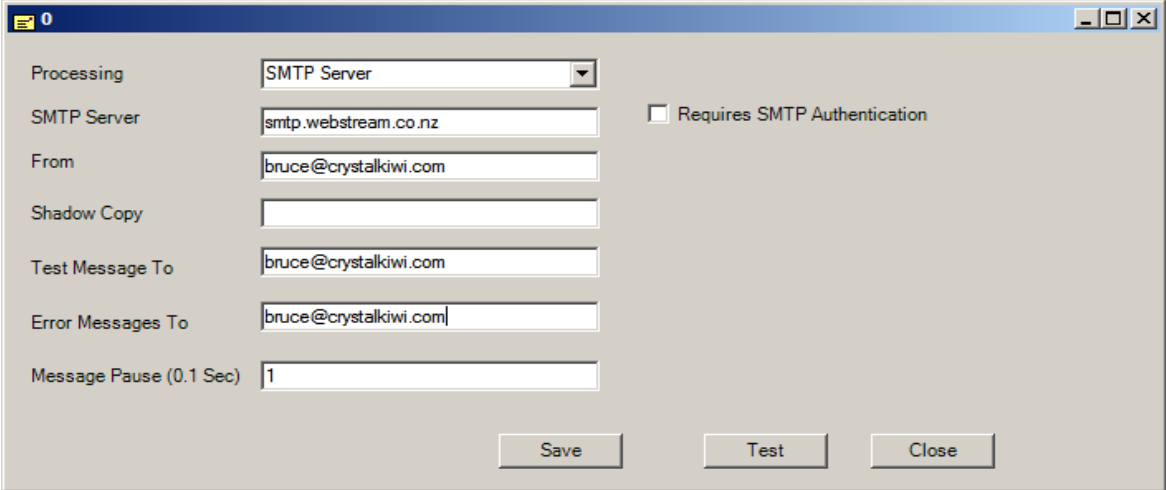
A special note if your reports use ODBC as a connection method. The Crystal Reports run time included with CrystalKiwi Scheduler is a 32 bit run time. It runs fine on a 64 bit server, but requires a 32 bit ODBC setup. The default Control Panel icon takes you to 64 bit ODBC.

You can configure 32 bit ODBC by running C:\Windows\SysWOW64\odbcad32.exe

Step 7: Email Settings

Reports in the schedule can be printed, saved to a local or network disk, or sent via email. The email component uses SMTP to send an email message directly to your mail server. You set this up as follows:

- Use menu item All Programs/CrystalKiwi/Scheduling
- Use the menu item File/Settings/Email Settings



Processing can be “Suspended”, “Use Test Address” or “SMTP Server”. Use “Suspended” or “Use Test Address” while you are testing report bursting, or some other process where you don't want the messages to go out for real. SMTP Server is used to send messages to your mail server

SMTP Server can be a machine name or IP address. It can be an Exchange Server, Domino, or any other mail server that accepts SMTP connections,

The From address is the default sender of all reports. You can also configure individual reports (and individual items within a bursting run) to use an alternate address as the sender. This must be an acceptable sender for the SMTP server, but this may mean it doesn't have to be a valid user on your domain. Some servers only check the domain, so you can use a generic user without a mailbox to receive replies.

Shadow Copy is for testing purposes and means that another user sees a copy of every message sent by the report scheduler. Not recommended for permanent use.

Test Message should be your internal email address. You should also test an external mailbox.

Error Messages to should also be your local email address or some administrator who can help resolve any

report delivery problems.

The message pause value is handy for bulk processing of report bursting runs. You can send hundreds of personalised reports in a few minutes. With one local client we send over 2000 customer statements every month. The process takes about 15 minutes. The problem is that these messages arrive in a flood to the mail server. They are stored in a temporary work space while they are sent to each recipient. If they are sent too fast the work area fills up and overflows.

Two potential solutions to this problem. The first is to break the bulk send into smaller chunks. The bursting form has a "Select Range" option and this seems to work fine with 700-800 messages at a time. A short break of 20 minutes or so and the next block can be sent.

The second solution is to have a pause after each message. By default it is a 0.10 of a second but this can be increased as required. You will find the optimal value for your mail server.

An external mail server is slower to send messages to, so this problem seems to apply mainly where the mail server is on a fast local network but with a slow external connection.

After you have set all this up, click the "Test" button. You should receive an email within a few minutes. Also use an external test address as messages might be fine to people inside your domain but blocked for external addresses.

Sending an email message to a mail server for an external email address is called "Relay". By default, on exchange this is blocked for external addresses. You need to ask your mail administrator to enable relay for the CrystalKiwi Scheduler machine or no external addresses will ever get a report.

Step 8: Test first report

Now you are probably ready to try your first scheduled report. Use the menu item Insert\Crystal Report. Select a simple report using the file browse that menu item displays. We recommend your first report has no subreports, uses simple tables or views and does not have parameters. You can load more complex reports once you get a simple one working properly.

Your reports can be on a network share, but the account running the service requires access to that file and folder. We find everything works best with a local "Reports" folder which has the scheduled reports. They can be copied from the master copies on the network shares.

Set the properties, where you want the report to go, and any parameter values that need to be set.

Use the menu item "Run On Desktop". This will run the report inside the current schedule administrator. You may find the report fails to connect to the database. You will need to use the menu item "File/Settings/Database Connection". Enter the user and password for the database and remember to "Save" the values.

Try "Run On Desktop" again. If this works, try "Run on Server" to see if the service can also run the same report. If that's the case, then you are ready to roll and can load your other reports.

If not, you have a database connection problem to resolve.

If you can Run on Desktop, but not on Server, then the CrystalKiwi Engine is the one having the problem. The account running the service is having a problem. The issue is with the account running the service, or the ODBC should be a System DSN so the service can use it, and things like that.

If the Desktop can't run the report then the service certainly won't. You need to fix the ODBC, the database client and other networking problems.

One way to help test, is to use the menu item Tools/Report Viewer. This will display the CrystalKiwi Explorer Report Viewer. Open a Rpt file and it should display in the viewer panel. Error messages are little easier to see using this approach. It is using the same email and database settings as the scheduler, so once this is working properly, the scheduler should be fully operational as well.